



# Financial Services Newsletter



## Issue 3

January 2018

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### Dates for the Diary

- 14<sup>th</sup> February 2018-Financial Services Away Day (The department will be closed all day)
- 17<sup>th</sup> April 2018-Financial Services Open Day- All invited

## Finance News

Happy New Year and welcome to the latest edition of the Financial Services newsletter.

Financial Services received 10 compliance plus awards in the recent CSE audit. Also there have been major changes to the department - ASIS Support, Data Records and Student Records have now relocated and joined the rest of the department on level 8 in the Schwann Building.

## Customer Service Excellence Achievement



For the fourth year running, Financial Services have been operating under the Customer Service Excellence Standard and here are the findings of our most recent audit in July 2017.

### Background

At our previous assessment in July 2016, the Service was found to be fully compliant, there were no areas identified as partially compliant and in 4 areas, the Service was found to be at a compliance plus level. After our last assessment, the Assessor was delighted to confirm that Financial Services now had increased the amount of compliance pluses to 10 areas of the Standard.

### Executive Summary by the Assessor

### Overall impression

It was the Assessor's opinion that, having carried out the assessment, Financial Services met the requirements of the Customer Service Excellence Standard. The Assessor found strong positive correlations between the verbal, documentary and observed evidence during the assessment.

Financial Services were clearly focused on providing the best services for students and staff. Staff that worked for Financial Services came across as being firmly

committed to the success of the institution through the provision of effective services to the many people that came into contact with them.

## Strengths

The Assessor witnessed a part of an institution that was well tuned to the requirements of the CSE framework and had developed several areas which merited compliance plus awards. The reason for the 10 compliance plus awards being recommended was that a cornucopia of evidence was found where Financial Services were exceeding the Standard (going far beyond what was expected – confirmed by customers), exceptional practice or delivery (now seen as best practice by other institutions) and were an exemplar to others (several awards received over the years).

Members of staff interviewed by the Assessor were very clear on the standards which were expected of them and were extremely conscious of how their particular roles (and those of their colleagues) firmly assisted with the delivery of quality services to customers in terms of responsiveness, focus, use of customer insight, flexibility, developing new approaches, meeting deadlines and also ensuring the provision of overall high quality financial services. *'Keeping the customer happy is key at all times'.*

Flexibility, receptiveness, approachability and continuous improvement of customer services were key maxims for Financial Services staff in terms of completely aligning themselves to the objectives of the institution and also when supporting their customers.



With regard to identifying customers' needs at the first point of contact, people were clear on how important this was, how this was achieved and also how they liaised with the customers and their colleagues if an immediate resolution could not be achieved (e.g. Student Ambassadors, dedicated staff and clear signposting protocols).

In terms of benchmarking & comparisons, Financial Services used evidence on performance in line with KPI's, management reports, NSS data and the achievement of/or nominations for Awards (e.g. Excellence in Procurement Awards – 2017/18 finalists).

All in all, the Assessor was very impressed with his visit to Financial Services and he left satisfied that CSE was embedded into the working life of everyone within the Service. Furthermore, he requested if we would consider being put forward by his company as a best practice department for the national CSE website. Following the assessment, the Head of Procurement John Thompson (CSE co-ordinator) presented, along with our Assessor, at the annual Conference on University Purchasing held in September 2017.

## Student Records Team



### Relocation

Following relocation from Level 9 Schwann Building in late December 2017, the Student Records Team has now settled into our new surroundings in the Student Finance Office on Level 8. The Team thanks their Financial Services colleagues for making them feel so welcome, and look forward to developing closer working relationships with them.

### Fond Farewell

Paula Morrison will be leaving the Student Records Team at the end of January to start a new role in the School of Art, Design and Architecture. She will be missed - we all wish her well in her new role.

### Enrolment

September enrolment took place in the Oastler Building for the first time in September 2017; this space worked really well and it is hoped that the same area can be used for the September 2018 enrolment. Approximately 6,500 September start enrolments were processed!

The Student Records Team is currently enrolling January start students at the Student Records Help Desk, which is located in Student Central. This is on a much smaller scale to the September intake and we expect to process approximately 300 new enrolments.

### Student Records Help Desk, Student Central

The Student Records Help Desk is open from 10am to 4pm until the end of January. Opening hours will then change to 11am to 2pm until the Easter break. Outside these hours enquiries are dealt with by iPoint in the first instance.

### Meetings with Schools

The Student Records Team is focusing on building closer working relationships with School Administrative Teams and have met with five out of the seven School Administrative Teams so far, with meetings for the remaining two Schools to take place this term.

### Contact us!

If you have any queries/comments about Student Records related processes please contact us; email us at [studentrecords@hud.ac.uk](mailto:studentrecords@hud.ac.uk) or telephone us on extension 3330.

## Meet the ASIS Support Team



Here are the faces of your new ASIS support team. All the posts have now been filled with the latest team members joining us in December. With the refurbishment completed we are now located in the Finance Office on level 8 of the Schwann Building.

The team is gradually getting to grips with the system, through specific Tribal training and firefighting support calls.

We will be coming out to Schools and Services to meet the users as we explore business processes and test the upgrade. To contact the team please use the ASIS support email address [asissup@hud.ac.uk](mailto:asissup@hud.ac.uk) rather than individuals.

## Management and Financial Accounting

Financial Services would like to say a big thank you to everyone who contributed to the production of The University's Financial Statements for the year end 31 July 2017, for keeping to the timetable and meeting the deadlines for information. Below is a summary of the University's results for the year to 31 July 2017:

	<u>2017</u>	<u>2016</u>
	<u>£'000</u>	<u>£'000</u>
Income	165,312	162,599
Expenditure	(151,509)	(138,853)
Surplus for the year	13,803	23,746

The University is pleased to record a healthy operating surplus for the year at 8.4% of total income.

### Budgets and Forecasts

The University's annual budget setting process commences shortly with the setting of assumptions for the 2018-19 budget and following year's forecasts. This is followed by the creating of the resource allocation model and detailed allocation of budgets by all schools and services. The process ends with the final sign-off by Council in early July and the submission of forecasts to HEFCE. Anyone involved in the process or just interested in how it works can find details of the 'Financial Forecast Timetable 2018' at: <https://staff.hud.ac.uk/finance/>

## PAYE Settlement 2018



Just a gentle reminder that expenses spreadsheets for the PAYE Settlement should be submitted on a monthly basis by all Schools and Services with the final information for the full tax year (6 April 2017 – 5 April 2018) being sent to Maureen Chambers by Friday 27<sup>th</sup> April

2018. Just remember, adding information to the spreadsheet does not automatically mean the expense will be subjected to a Tax and NI calculation. However, it will demonstrate to HMRC that the University is carrying out a thorough examination of its expenses.

And for those of you who think accountants are grey.....

*Why did the cannibal accountant get disciplined? For buttering up her clients*

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## Agresso Support

### New Local Asset Register

The New Year brings more change and challenges to the Agresso Support team. The next big project is a new University wide system for monitoring each School's and Service's small assets. Work is currently underway to replace the current LAR system with a more efficient one and members of the team will be visiting Schools and Services to develop this in the first quarter of 2018.

### Agresso Upgrade

Just when you thought you had come to terms with using Agresso, the Supplier has released a new version and we need to upgrade to this to ensure we remain supported by the authors. This is scheduled to go live early Summer 2018, once testing and training has taken place.

### Support

Lindsey Smith has joined the Agresso Team as front line support in January 2018 and last October Richard Squires was appointed as Financial Systems Manager. The team will be having regular meetings and training every other Tuesday at 10am starting on 19th January 2018, so if everyone could avoid phoning the help desk between 10am and 11.30am on these days this would be greatly appreciated. Please feel free to send emails during this time and we will pick these up when we return to the office. We are also introducing TopDesk to Agresso support; this ticketing helpdesk will help us to provide more efficient and effective support to our customers. As we all become familiar with TopDesk, it may take us a little longer to log tickets but we are confident we will be back up to speed in no time at all.

### Expenses

The expenses system on Agresso is now live and rolled out to nearly all Schools and Services. Please note that all expense claims must be processed within 28 days of

the claim taking place and that advances should be raised 2 weeks prior to the expense being incurred. Initial usage has been good and the system is beginning to bed in. The policy and procedure notes can be found by using the following link <https://www.hud.ac.uk/media/policydocuments/Expenses-and-BenefitsPolicy-and-Procedure.pdf> and should assist claimants when making a claim.

You can contact Agresso Support by email – [agresso@hud.ac.uk](mailto:agresso@hud.ac.uk) or phone extension 3833.

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## The Runners!



At the end of 2017, we said ta-ta, cheerio and goodbye to Jenny Stawman, Stella Fulton and Nathalie Chavrimootoo. Collectively, they have given 70 years of service to the University and we wish them well as they embark on their new adventures. They will be sorely missed, not only within the department, but by many throughout the University.

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## Financial Services Open Day- Save the Date

