



Department
for Education

Schools financial health checks – advice for suppliers

This document aims to help suppliers providing financial health checks to schools provide a professional service. You may wish to read the information relating to schools on selecting a supplier to gain a better understanding of the financial health checks.

Being approached by a school

Schools will be able to see your details in the schools financial health check supplier directory. If a school wants to find out more about the services that you offer they will contact you directly.

When the school first makes contact with your organisation they may need to discuss what their requirements are and whether or not you can help fulfil them.

If the school knows exactly what they require, you should allow some time to ask any necessary questions and provide a response to their needs.

If the school is not entirely clear on what it is that they require then you should advise them to the best of your ability. When advising the school you should avoid using standard packages developed as part of your services. Your aim should be to help the school develop their own requirements.

The delivery of the health check should not lead to any on going commitment for the school. If the department is made aware of any situation such as this you may be suspended from the supplier list.

Providing the right information

Any information you provided when you registered as a supplier will help schools and trusts to identify a suitable supplier. It is your responsibility to make sure the information you provide is accurate. If the department is made aware of any false information that you have provided you may be suspended from the supplier list.

When a school gets in contact with you they are likely to ask a number of questions. The questions could include:

- what other schools and trusts have you worked with?
- which person/people (“the health check team”) will deliver the services?

- how will the skills, knowledge and experience of the health check team be used to deliver the health check?
- how well do the members of the health check team know the education landscape and the challenges currently facing schools?
- how well do the members of the health check team understand the context and circumstances of my own school / trust?
- what form will the review take?
- how long will it take?
- how much will you charge?
- who would you need to speak to?
- how much of their time will you need?
- what information would schools need to provide to you?
- what will your health check report include?
- how will this information be communicated to the school?
- do you include free follow on guidance as part of the service you are offering and, if so, what are the limits to this?
- can you meet the school's timescales?

What you need to provide

When you complete a financial health check for a school, the advice you provide to them could impact on their resources in the future. As part of your final report you should include at least:

- a summary of issues you were brought in to address
- a description of the work undertaken
- conclusions, recommendations and action required
- educational benefits
- list of potential efficiency savings
- options which were considered and reasons for your recommendations

Filling out the supplier registration form

You will need to provide:

- details of your organisation
- relevant skills and experience
- the types of support you can provide from the schools financial health checks structure

- a declaration that all of the information provided is correct
- an electronic signature from a person with suitable authority in your organisation

Schools will contact you if they want to find out more about the services you offer.

Suppliers already listed in the directory should also use the form to let us know of any changes to their information.

Please note that:

- the schools financial health checks supplier directory is not a complete list of organisations that provide financial support to schools
- organisations listed in the supplier directory are not endorsed by the government, DfE or EFA
- if a supplier is in financial difficulty, or is the subject of a financial investigation, the DfE reserves the right not to include them as a supplier
- the estimated value of a single contract issued by any school, academy or MAT should not comprise a value in excess of the appropriate EU procurement threshold

We have provided the following guidance to assist you in filling out your supplier registration form. When drafting your entry:

- you may include descriptions of your core business that does not correspond directly with financial health checks but please do not seek to use the directory as a means of selling other services that you provide
- do not use the form to promote services aimed at personal financial advice to school staff
- consider what level of business you can support in deciding how widely to advertise your services on the directory to schools across the country
- please do not write comments about government policy in your entry
- ensure that your entry is concise and clearly details what financial health checks service you can offer to schools
- before you submit your form, please check the spelling, punctuation, grammar, and accuracy of your entry
- please be aware that once you submit your form, it may take up to a month for your entry to appear on the directory
- note that we will be in touch to confirm when your entry is listed