

Service Definition Document

Collection Fund Accounting Services

GCloud15



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About Moore Insight

Experts In Our Field

For more than 30 years, Moore Insight has delivered flexible, high-quality change management, technology, and business advisory services to organisations across both the UK public and private sectors. We specialise in the review, enhancement, procurement, implementation, and ongoing support of Enterprise Resource Planning (ERP).

All About People

People are at the centre of everything we do: our clients, our colleagues, and the communities we serve. Our aim is to develop solutions that inspire and empower individuals and organisations to reach their full potential.

As a member of the Moore Global network, an international association of more than 260 professional services firms across 116 countries, we share a collective commitment to providing innovative, client-focused services that enable organisations worldwide to achieve exceptional outcomes for their customers and citizens.

Delivering Excellence

We have established a strong reputation for enabling meaningful and lasting transformation, guiding organisations through some of the most complex system replacement and improvement programmes within the public sector, including central and local government, higher education, healthcare, and emergency services, as well as across private and not-for-profit sectors.

At the core of our ethos is the belief in truly “making systems work.” We go beyond the technology to gain a deep understanding of the business, operational, and regulatory environments in which our clients operate. As a result, our clients consistently realise measurable benefits from their transformation programmes, such as significantly improved and streamlined ways of working, enhanced financial and management reporting, improved service delivery, and substantial cost savings.

Our Winning Team

We operate through blended, highly skilled teams comprised of both permanent employees and trusted associates, enabling us to draw on a wide range of capabilities and provide the flexibility required to meet each client’s unique needs.

Flexibility Of Resources to Support You

Our core consultancy team is complemented by a network of more than 50 specialist associates. In addition, we collaborate with software providers and consultancy partners across the UK and internationally, ensuring that we can deliver a tailored, comprehensive service to our clients.

Our consultants are hand-selected for their expertise and are committed to working collaboratively with our clients. Through this joint approach, we are able to leverage local



knowledge, strengthen team integration, and promote the exchange of skills and insight. This collaborative model is one of our particular strengths.

From the outset, our specialist team will work closely with you to understand your business needs and guide you through the methodology we apply to achieve the best possible solution.

Meeting Standards of Excellence

To uphold the highest professional standards, we have built a team whose expertise is grounded in both recognised qualifications and deep practical experience. Our consultants hold credentials such as CIMA, ACCA, ICAEW, CIPFA, CIPD, PRINCE2, CISM, and CISA, reflecting the breadth and depth of capability within the organisation. This combination of professional accreditation and real-world experience ensures that the services we deliver are aligned with your business needs and meet the standards of excellence you expect.

Benefits of Working with Us

- We are seasoned practitioners across the professional disciplines that ERP systems support—including accountancy, finance, human resource management, procurement, and payroll—bringing both specialist knowledge and hands-on expertise.
- Our team has extensive experience within the UK public sector and a strong understanding of government structures, operational processes, and the relevant legislative and regulatory frameworks that underpin them.
- We deliver services in close partnership with our clients, working as integrated teams to ensure smooth navigation of business systems and effective knowledge transfer. We take pride in communicating best practice in clear, accessible language that is easily understood by both internal users and external third parties.
- We are deeply committed to unlocking business value from both change management initiatives and technology-led improvements. We are equally comfortable providing part-time strategic and operational advisory support as we are acting as full implementation partners and project managers.
- Quality underpins everything we do and is supported by our accreditations, including ISO9001 for Quality Management Systems and Cyber Essentials Plus. Each engagement is overseen by a designated Client Delivery Director who ensures quality outcomes and high levels of client satisfaction.
- While we are fully equipped to deliver services remotely, we also provide on-site support where appropriate. Our consultants are mobile and able to work across the UK as required.
- We operate as an ethical and environmentally responsible employer and partner. We are recognised as a “Great Place to Work” and are committed to fair and inclusive employment practices, demonstrated through our Real Living Wage and Disability



Confident Employer status. We prioritise prompt payment of suppliers and maintain a zero-tolerance stance on modern slavery within our supply chain.

Previous Experience

You can find testimonials from clients and case studies on our website:

<https://www.moore-insight.com/main-case-studies>

How Our Service Works

Onboarding and Offboarding

Once the service has been commissioned, we will schedule a formal kick-off meeting to introduce members of our consulting team and to meet your key stakeholders. During this session, we will outline the overall delivery approach, confirm expectations, establish communication channels, and address any logistical or administrative considerations such as access to shared workspaces. This introductory phase provides a valuable opportunity for us to gain familiarity with your organisational culture, governance requirements, and preferred working methods.

Upon completion of the project, we will arrange a project closure meeting to verify that all final activities and agreed deliverables have been completed to your satisfaction. This session will include a full handover, documentation of lessons learned, and confirmation of effective knowledge transfer. We will provide a record of the outcomes to support future reference within your organisation. The closure meeting also offers a forum to discuss any follow-on services, transition arrangements, or additional support you may require.

Any additional onboarding or offboarding activities will be undertaken in accordance with the provisions set out within the Order Form of the Call-Off Contract.

What you can expect from us

- We will take the time to understand your organisation's strategic priorities, objectives, and operational context to ensure that the services we deliver are aligned with your core requirements.
- We will apply proven methodologies and recognised best practices, adapting them to the unique needs of your organisation. From Day One, we will undertake a structured discovery phase and work with you to define a transparent and mutually agreed implementation and communication plan, ensuring effective progress monitoring against key milestones.
- You will be assigned a dedicated Client Delivery Director who will maintain regular strategic engagement with your Senior Responsible Officer or Project Sponsor. Where appropriate, they will participate in project boards, manage the client relationship, monitor delivery satisfaction, and serve as the escalation point for any issues not resolved at project-team level.
- We will safeguard continuity of service and maintain quality throughout the duration of the engagement. Consultant time will be scheduled in alignment with your needs, and named resources will be identified at the outset within the project plan. Should a



change in personnel be required, we will ensure replacement consultants are of equivalent or greater expertise and will seek your approval in advance of any change.

- We will provide knowledge and skills transfer throughout delivery to equip your team with the capabilities needed to adopt and manage new systems, processes, or ways of working. This may include joint working, shadowing, and hands-on learning.
- We will deploy and maintain a secure online collaborative workspace for project documentation, communication, dashboards, and reporting, ensuring transparency, auditability, and a single authoritative source of information.

What we can expect from you

- Establish suitable project controls and governance arrangements, including development of a project plan. Where these are not yet in place, we ask that you participate collaboratively during project initiation to define them.
- Engage actively in project activities, including workshops, interviews, consultation sessions, and decision-making points.
- Ensure that key personnel are available in accordance with the agreed delivery schedule and resource plan, and that backfill arrangements are made where appropriate to minimise disruption to business-as-usual functions.
- Provide timely access to business systems, information, data, and networks where required for the successful completion of project deliverables.
- Review outputs, provide feedback, and formally sign off deliverables in alignment with agreed timelines.



Collection Fund Accounting Services

Service Summary

Provision of specialist collection fund accounting support – budgeting, monitoring and financial close.

Service Features

The main features of this service are:

- Collection fund accounting, budget planning and MTFS
- Business rates and council tax strategy and forecasting
- Collection fund monitoring and surplus/deficit forecasting
- NNDR1, 3, council tax returns support
- Provision for appeals calculations and advice
- Collection fund monitoring tools (quarterly monitoring)
- Collection fund close, apportionments, levy/safety net, S31 grants
- Understand the reason for ongoing surplus or deficit positions
- Understanding in year positions and movements aiding planning

Service Benefits

The main benefits of this service are:

- Safe pair of hands with expertise on collection fund legislation
- Better overview of data with reports providing back-up working papers
- Low risk: responsibility out of buyers hands
- Keep costs low vs hiring internally
- Time saving: service features provide holistic efficiencies
- Ensuring maximisation of resources for the general fund
- Increased overall understanding leads to improved finance management



Further Information

For more information about this or any of our G-Cloud services or to discuss your requirements in more detail, please email info@moore-insight.com and we will be happy to contact you.

Please include the following information in your email so that we can get the best people to deal with your request.

- The name of this service
- The name of your organisation
- Your name and contact details
- A brief description of your business situation
- Your preferred timescales for starting the work





MOORE Insight

Moore Insight have been supporting organisations to transform their Enterprise Resource Planning and back-off systems for over 30 years.

We have a strong reputation for delivering true and innovative transformation, having dealt with some of the most complex systems replacement and improvement programmes across the public and private sectors.

Our ethos is to 'make systems work' by going beyond the technology to gain a deep understanding of our clients' business and regulatory requirements.

Our clients have realised benefits from their change programmes including significantly improved and efficient ways of working, better financial and management information, better service delivery, and cost savings.



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