



Peterborough Diocesan Board of Education

Proposal to provide Audit and Accountancy
Compliance Services

Date. June 2022



Dear Peter

I am delighted to have the opportunity to present this proposal. Thank you for giving us the opportunity to tender for the provision of audit and accountancy compliance services and for the information on the company's activities and requirements.

I will take personal responsibility to ensure that we maintain a high level of communication with you and that you receive a prompt service from your Azets team.

This document provides more background to us as a company, details of how we anticipate working with you, together with our proposed fees.

If you have any questions, or if you would like to meet with any of the team, please do contact me.

Yours sincerely

Paul Tyler
Partner

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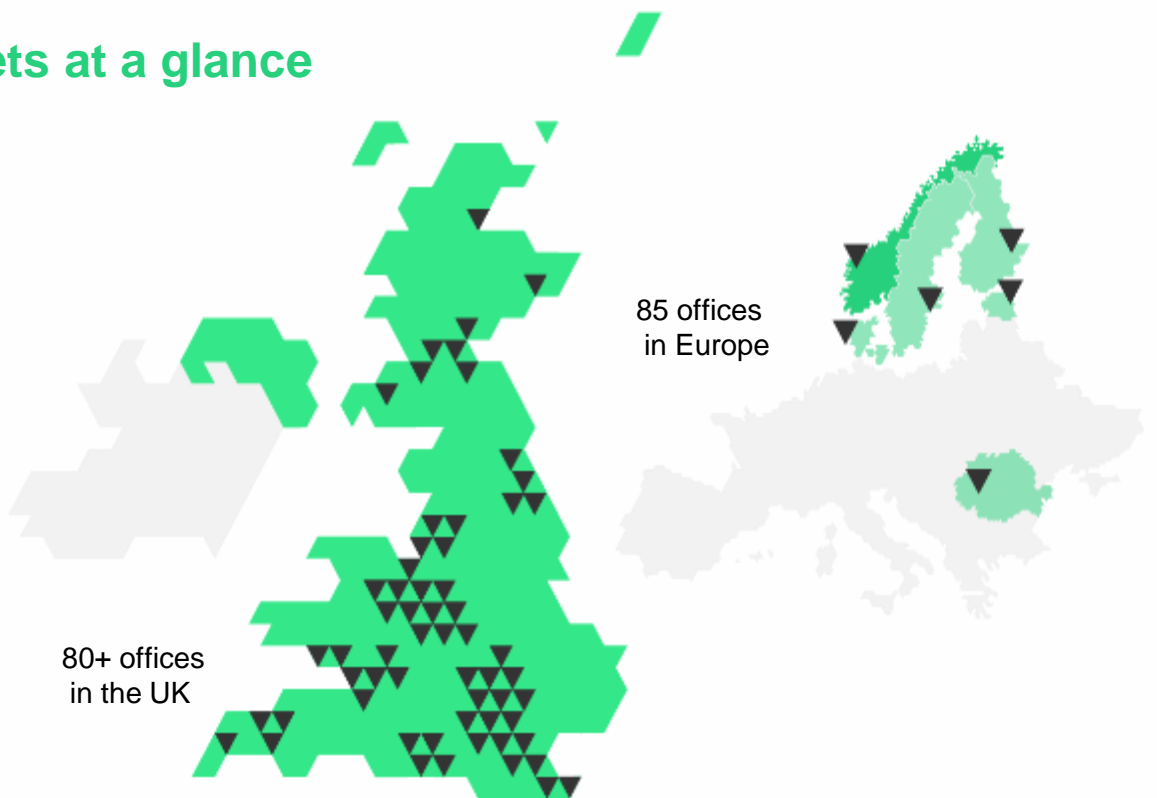


About Azets

We are an international accounting, tax, audit, advisory and business services group that believes in delivering a personal experience, both digitally and at your door.

With over 6,500 specialists across our office network, we help people and organisations of all shapes and sizes save time, work smart and achieve their goals. Our job is to give you the support you need so you can focus on what you do best.

Azets at a glance



160+ Offices



6,500 People



£500m+ Turnover



120,000 Clients



Our services

Helping businesses and individuals achieve their ambitions.

We offer a wide range of accountancy and business advisory services to help you every step of the way. Our specialists can support you with many aspects of your business. Whatever your size or sector, our local teams across the UK are ready with practical, personal advice.



Accounting & Compliance



Tax



Audit & Assurance Services



Business Services



Advisory



Payroll

Our sector experience

We work with clients in various sectors and our team of experts have in-depth knowledge to help you with issues that affect you most.



Arts & Media



Brewing & Distilling



Charities & NFP



Education



Healthcare



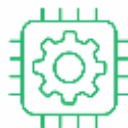
Retail



Rural



Public Sector



Technology



Professional Services



Manufacturing



Construction

For more information on all the services we provide and on our sector experience please visit www.azets.co.uk, where you will also find information about our free webinars, ensuring you are up to date on all the latest news and guidance.

Your Azets team

Paul Tyler will be the partner in charge of this work, supported by David Smith, as audit manager. As and when required we are supported by a number of tax specialists including Kathryn Walshaw based in our Kettering office and Carl Nielsen who has a particular specialism in VAT.

Whilst we cannot guarantee continuity of audit staff, we strive to ensure continuity of members of the audit team. We also recognise that sometimes a 'fresh pair of eyes' can be useful.



Paul Tyler BA (Hons) FCA Partner

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Paul is one of our partners as well as being office managing partner. Paul leads teams on a range of external audits, accounts, taxation and other advisory matters. Clients are varied and range in size from small owner managed business to £50m+ turnover groups and academy schools.

Paul joined the predecessor practice from university in 2001, and qualified as a Chartered Accountant in 2005, working his way to manager level and he was then made a partner in 2012.

Paul has been working in the academy sector since 2012 and before that in the general education sector for 15+ years and has academy clients ranging from small standalone primaries to large Multi Academy Trusts with 12 schools.

Alongside his responsibilities for client work Paul is also responsible for the successful running of the office which he heads.

David Smith ACCA - Audit manager T 01536 514871 E david.smith@azets.co.uk

David is an audit/accounts manager in the Kettering office.

David works closely with the partners and more junior members of staff to ensure all clients deadlines are met and work is produced to a high standard.

David joined the Kettering office in 2012 straight from University and went on to qualify as an ACCA member in 2018. David enjoys the technical side of accounting/auditing and is often the "go to" person in the office for complex accounts or accounting queries.

As well as undertaking a significant amount of work in the education/academy sector David also has a number of clients in both the commercial and agricultural sectors.

Audit methodology & process

Statutory audit is a compliance driven service however, we aim to provide business owners with useful recommendations as a result of the work we do. Any significant issues are formally reported to the Directors in our official management report.

Overall our approach to audit is to ensure that our clients “feel audited” at the end of the process, but that it is done in a friendly and efficient manner.

Our paperless audit software and document sharing portal prevents the endless printing of documentation and increases the efficiency of the audit process.



Your pricing plan

Proposed fees

As part of our commitment to clients, we encourage two-way communication throughout the year and therefore our fees do include as many phone calls to our office as you require. If any significant additional assignments arise from these conversations, a separate charge may apply, but this would be discussed with you at that time.

Service	Price (Exc VAT)
Statutory audit of the accounts for Peterborough Diocesan Board of Education.	£5,000
Preparation of statutory accounts for Peterborough Diocesan Board of Education.	£1,250
The above assumes you maintain fully reconciled and balanced accounts within your own accounting software.	

Please note that our fees exclude VAT.

Additional services to be agreed in advance of the delivery, for example

- Payroll
- HR Support

Audit process

Planning

The plan revolves around ensuring a thorough and robust audit together with regular communication so that everyone knows what is required of them and that there are no last-minute surprises.

Developing working practices

We work with finance team to ensure that the right information is available to us at the right time so that the audit runs smoothly for all of us. Whilst there are many things that we must have as part of the audit we can be flexible with the format of that information and wherever possible we use information already available within the school rather than requiring things in a set format.

We will work with you to get the balance right between working remotely and working with you on site, to ensure an efficient audit. We like to spend at least part of the time with you on site as this often enables records to be seen and questions resolved more efficiently.

Use of technology

We use technology wherever it is helpful to providing an efficient service to our clients. Examples include:

- The electronic transmission of data between us wherever possible;
- The provision of an electronic 'dropbox' to facilitate the transmission of information between us;
- We use specialist audit software to assist in the documentation of our audit work;
- Where appropriate, the electronic extraction and manipulation of accounting data to identify trends and unusual items;
- Meetings held by video conferencing to include people in multiple locations.

Quality assurance

We have a number of quality assurance processes in place. These include continuing professional development for our team, ongoing reviews of audit work, cold file reviews of a sample of audit clients and, where appropriate, the involvement of a second partner. There is also a national compliance team within Azets to address particularly challenging circumstances.

Our vision

To make our services smarter, more effective and more personal every day.

We constantly focus on delivering against our vision statements.

Smarter

We invest in the best digital technology to make life easier for our clients / customers.

Effective

We constantly strive to recruit the brightest people who love what they do, from a diverse range of backgrounds and specialisms.

Personal

We are available everywhere – whether through our network of offices or our digital solutions we are determined that our clients have an expert team who understands what it's like to do business where they are

Our values

Everything we do is driven by a deep human connection between our people and clients.

Collaborative

Stronger together. We share knowledge, ask for help and empower each other to achieve more collectively.

Authentic

We constantly ask ourselves what the right thing is to do for our people, our clients and our business, acting with integrity at all times.

Respectful

We are open minded and value everyone's contribution, embracing our differences and fostering a culture of trust and inclusion.

Dynamic

We adapt quickly to change, finding smart ways to deliver the best results and remain one step ahead.

