

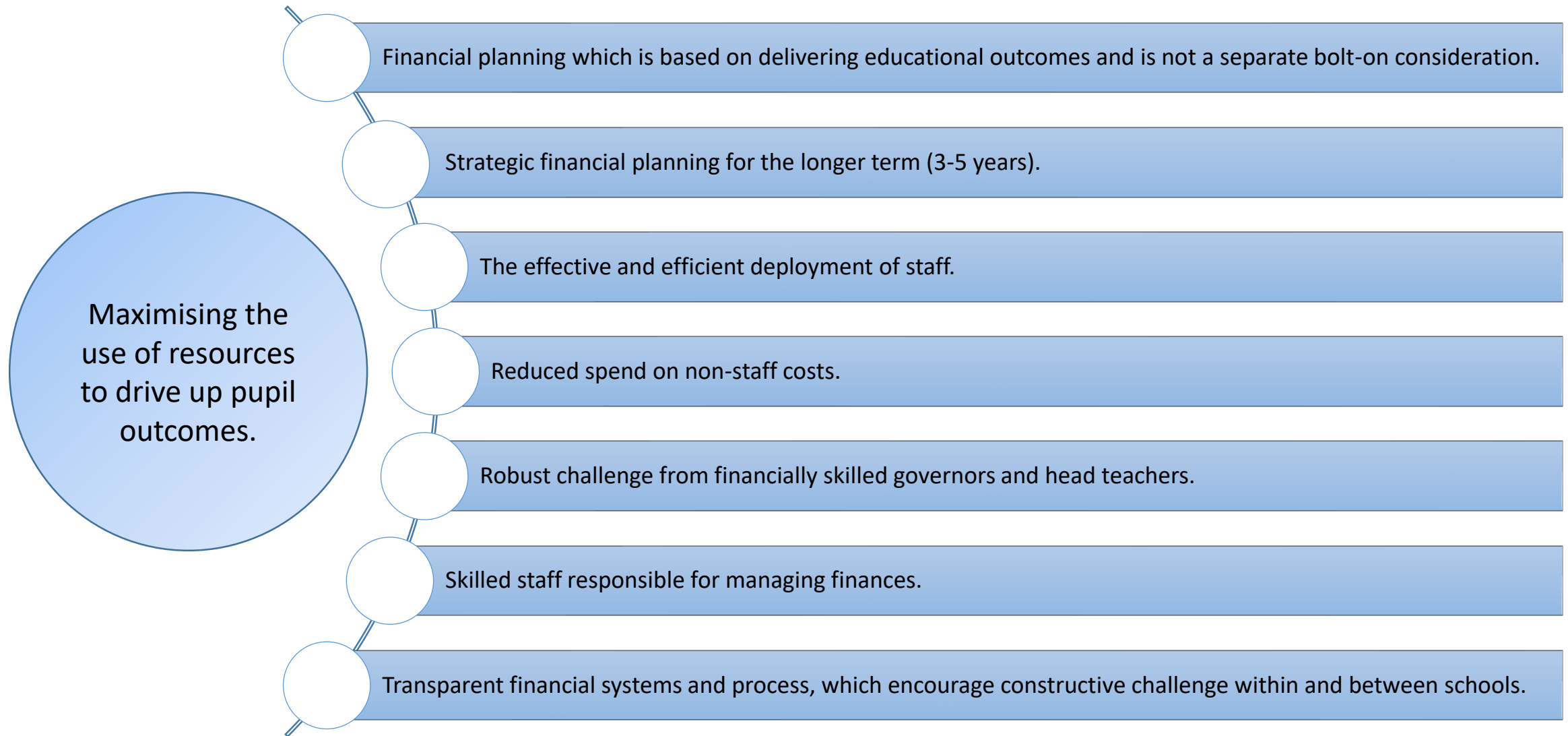
School Resource Management

School resource management tools available, including the school resource management advisor scheme

Lewis Montgomery – Education and Skills Funding Agency



Excellent school resource management – key elements



Excellent school resource management – current offer

Area	Summary of existing offer and next steps
Procurement	<ul style="list-style-type: none"> • Risk Protection Arrangement for academies. An alternative to commercial insurance. From Sept 2018, cover now includes overseas travel and cultural assets. Further improvements are planned for 2019. • 36 recommended deals saving time and money for purchases across Facilities, IT, Business Services and Utilities • Pilot buying hubs in the North West and South West: Regional advice and guidance services to help with buying.
Workforce	<ul style="list-style-type: none"> • Agency supply framework – transparency on mark-ups, DBS checks, no temp-to-perm fees after 12 weeks. • Teaching Vacancies – free search and listing service (gov.uk/find-teaching-job). The service is being roll out across England and will be available nationally in early 2019.
Data & Transparency	<ul style="list-style-type: none"> • Financial benchmarking service – allows schools / trusts to compare spend with similar schools / trusts. In early 2019, we will be adding additional functionality to make it easier for users to find comparable schools. • School resource management self-assessment tool – providing academies with RAG ratings on their pattern of spending and helping them to identify where improvement may be possible. A version for maintained schools will go live in 2019. • Efficiency metric – gives schools an indication of efficiency, based on pupil attainment and the money used to achieve it • Guidance on Understanding Your Data for school governors and academy trustees. • Top ten planning checks for governors to help them manage resource effectively
Financial Skills	<ul style="list-style-type: none"> • Support and guidance on Integrated Curriculum & Financial Planning, including an explanatory video and signposts to tiered Financial Health Checks. • Regular updates from the schools business professional contact list.
Support	<ul style="list-style-type: none"> • School Resource Management Adviser pilot – identified c£35m of opportunities from first 72 reviews. • We have procured a longer-term, larger-scale cohort of SRMAs to provide support to more trusts and schools. • Deployed by the Education & Skills Funding Agency.

Focus on data and benchmarking – Self-Assessment tool

The tool exists in two forms:

- **Schools Financial Value Statement** for maintained schools. The 19-20 update has recently been published.
- **The Self-Assessment tool** for academies.

Both tools allow schools to:

- Fill in their characteristics and latest data, which the tool compares to national averages for similar schools or recommended standards.
- View data in an accessible way – easy to print and share, RAG-ratings make areas for discussion clear.

We recommend that schools self-assess regularly and share the results with SLT and governors.



Example:

A. Information about your school

School name:			
Phase:	Region:	Number of pupils:	Percentage of pupils eligible for FSM:
Secondary without sixth form	South East	754	21.7%

	Your school	Rating against thresholds
B. Your spending as a percentage of total expenditure		
Spend on teaching staff as a percentage of total expenditure	44.8%	Lowest 20% of similar schools
Spend on supply staff as a percentage of total expenditure	3.1%	Broadly in line with similar schools
Spend on education support staff as a percentage of total expenditure	19.4%	Highest 10% of similar schools
Spend on administrative and clerical staff as a percentage of total expenditure	7.9%	Broadly in line with similar schools
Spend on other staff costs as a percentage of total expenditure	1.0%	Broadly in line with similar schools
Spend on premises (including staff costs) as a percentage of total expenditure	7.7%	Broadly in line with similar schools
Spend on teaching resources as a percentage of total expenditure	5.6%	Middle 20% of similar schools
Spend on energy as a percentage of total expenditure	3.4%	Highest 10% of similar schools
Other spending as a percentage of total expenditure (balancing line)	7.1%	N/A

C. Reserves / balances as a percentage of total income		
In-year balance as a percentage of total income	0.7%	Low risk
Revenue reserve as a percentage of total income	-1.0%	Medium risk

D. School characteristics		
Average teacher cost (£)	£50,900	Middle 20% of similar schools
Senior leaders as a percentage of workforce	7.9%	Broadly in line with similar schools
Pupil to teacher ratio	17.2	Highest 20% of similar schools
Pupil to adult ratio	8.5	Middle 20% of similar schools
Teacher contact ratio (less than 1.0)	0.80	Broadly in line with recommendations
Predicted percentage pupil number change in 3-5 years	1.5%	Low risk
Average class size	23.8	Highest 20% of similar schools

E. Outcomes		
Ofsted rating	Good	Good
Progress 8 score	0.20	Average or above average

What and who are SRMAs?

- **School Resource Management Advisers**
- **SBMs and other School Leaders** experienced & knowledgeable in how to maximise efficient resource use for benefit of students' education
- **Qualified** to do the role through a stringent assessment process
- **Accredited** by the Department to support schools and academies
- **Able** to help and advise schools and academies on how to improve by:
 - **Analysing** a school/academy's resource using ICFP methodologies
 - **Diagnosing** where the school/academy has potential to improve resource use
 - **Identifying** a range of opportunities for improving resource use
 - **Generating** recommendations for management action to improve the efficiency of resource use to have the greatest impact for the students' benefit



SRMA Pilot Headlines

- Over £35m of savings/revenue opportunities have been identified from 72 completed SRMA deployments during the pilot.
- Savings have been identified across both workforce and non-workforce spend. The goal is now to realise these savings and ultimately reduce or avoid in-year deficits.
- Feedback very positive, with 94% of trusts who responded rating their experience of working with a SRMA good or very good - it was a “useful challenge to our thinking and approach as well as a good sounding board for options to consider”.
- We are hoping to recruit at least 160 SRMAs through 9 suppliers over the coming months – accreditation process is still open.
- Each SRMA needs to go through an accreditation process to ensure they have the expertise and confidence to work with schools and trusts in financial difficulty. This process is run by ISBL, and it is the responsibility of the 9 suppliers to put forward suitable candidates.
- The nine suppliers we have contracted with can be found [here](#), with contact details.

Questions

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