



Education & Skills
Funding Agency

School Resource Management Advisers: Information for Local Authorities and Maintained Schools

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About School Resource Management Advisers

Following the success of the pilot in 2017/18, the Department for Education continues to offer independent and accredited School Resource Management Advisers (SRMAs) to support schools and academy trusts. SRMAs are independent advisers, not employed directly by the department, who have experience of managing resources in the education sector. They are trained to suggest alternative uses for the available resources to find more efficient ways to deliver the best possible educational outcomes for pupils.

SRMAs may be practicing school business managers and school leaders, currently working in schools or academy trusts, or consultants working for themselves or for an education consultancy organisation. They all have significant experience of school business management and have undergone a challenging accreditation process. Education Performance Improvement Ltd is currently contracted to deliver induction and accreditation for new SRMAs to ensure they have the right skills and experience for their role. All SRMAs are linked with one of the SRMA suppliers, North Yorkshire County Council (NYCC) or The Institute of School Business Leadership (ISBL).

Each SRMA supplier and the SRMAs working with them are legally bound to maintain confidentiality and comply with data protection rules while carrying out deployments. You can view information about the School Resource Management Adviser contracts the department has in place with the suppliers on the [Contracts Finder](#) website.

SRMA deployments are funded by the department; schools or local authorities (LAs) do not have to pay for this support. However, the LA's approval is required before a deployment takes place.

Overview and Purpose of an SRMA deployment

1. The SRMA offer is open to all schools. The objective of most SRMA deployments is to support schools to make best use of available resource to provide an outstanding education for pupils. In all cases a named case lead in the department will commission the visit and act as a point of contact for the school, the local authority and the SRMA.
2. In cases where a school is financially stable, the SRMA will work with the school to consider different ways they could optimise their resources and potentially reduce unnecessary spend that could be reinvested in the areas that are of most importance in delivering the best possible education to pupils.

3. Where a school has a deficit or is forecasting a deficit the SRMA will look at the underlying reasons for this position and support the school to develop strategies to return the school to financial stability.
4. At each deployment, the SRMA will conduct an initial review of the school's financial data and metrics. They will arrange a series of meetings with key people at the school, including members of SLT and governors, to discuss the school's data and their approach to financial and resource management and to obtain a better understanding of their vision, the challenges the school faces, and use this context to inform the data. Conversations will cover the range of school resource management tools and guidance available, with a focus on integrated curriculum and financial planning (ICFP). If the school is not already using ICFP, the SRMA will talk through the benefits of this approach, the tools available, and will run through a diagnostic. If the school already uses ICFP, the SRMA will discuss how the metrics are being used to support the school's planning.
5. At the end of the deployment, the SRMA will discuss their findings with the school and present recommendations for the school to consider; it is up to each school, in collaboration with their LA, to decide which recommendations they want to take forward. The SRMA will ask the school for their initial feedback at this point.
6. SRMAs will produce a draft report for each deployment, which follows a standard template but can be adapted to suit each setting. The report will include key efficiency metrics, the SRMA's analysis and their recommendations based on their review. The SRMA will share their findings and draft report with the department. All reports are quality assured to ensure they are clear and factually accurate. Once finalised, the case lead will send the final report to the LA to send on to the school.
7. Six months after sending the report to the LA, all deployments are followed up with an evaluation workbook for the school to complete. This is an opportunity for the school to consider progress and next steps. The workbook helps the department measure the impact of the programme and gather feedback to ensure the programme continues to meet schools' and trusts' needs.

Before the SRMA's meetings with the LA and schools

8. Once a deployment has been agreed, by both the LA and the school(s), the LA will be asked to complete a data information sheet for the school(s), which will

assist the department in commissioning the most suitable SRMA. The department will commission an SRMA from one of our two suppliers: the Institute of School Business Leadership (ISBL) or North Yorkshire County Council (NYCC). The case lead will contact the LA to confirm the allocated SRMA's name and check there is no conflict of interest from either the LA or the school(s) perspective. We expect conflicts of interest to be rare; examples of conflicts could be that the school employs a close relative of the SRMA, or that they are a previous employee of the LA.

9. As part of the deployment process, where the school has set up a **View My Financial Insights (VMFI)** account, SRMAs are encouraged to use this tool to complete their initial review of the school. The department will ask the school to grant the allocated SRMA access to the school's information through the portal, for the duration of the deployment.

10. The department will brief the SRMA on the background to the school(s) and highlight any key areas of possible focus for their meetings, after which a virtual three-way conversation between the case lead, SRMA and LA, will take place, to ensure all parties are clear on what is expected, and by when. During this meeting the SRMA will confirm any additional information they need ahead of their meetings with the LA and the school(s), as well as the things they will want to have sight of during the meeting.

11. The SRMA will contact the schools to agree the date of their meeting and request any further information they require to support the deployment which may include:
In advance of the meeting:
 - Latest budget and financial plan – to include at least one previous year and the starting balances for the current year
 - Pupil numbers actual and forecast
 - Staff list and Staffing Structure – ideally including total teaching staff FTE and support staff FTE, teaching, support and non-curriculum staff costs, SLT and TLR costs
 - Curriculum planning documents
 - Completed Schools Financial Value Standard (SFVS)
 - Contracts and SLA register

During the meeting:

- Management accounts, budget projections and medium-term financial plan
- LA Scheme for Financing Schools and LA finance policy

- Latest governing body or Interim Executive Board meeting or finance committee meeting reports and minutes.
 - LA audit report
 - Any recent relevant Schools Forum decisions
 - The level of finance support provided by the LA either as part of its statutory duties or via a traded service
 - Any LA school place planning issues which may impact on school organisation e.g. pupil numbers, potential Federation options, move from three tier to two tier etc.
12. The SRMA will use the information that the LA and school(s) provide to develop an understanding of the school's financial health and approach to school resource management, how it compares against benchmarks and to consider areas of focus for their meetings. We encourage SRMAs to use their own ICFP diagnostic tools as well as the department's ICFP resources [here](#), financial benchmarking tool [here](#), the Self-Assessment and the workforce-benchmarking tool [here](#).

The SRMA's meetings

13. Where possible, we suggest the SRMA should conduct their meetings in-person, as this helps them to better understand the school's context and helps build rapport with the school's leadership team. However, recent experience has demonstrated that virtual deployments, conducted through Zoom or Teams calls, can be effective and may be more appropriate in some cases.

SRMA meeting with the schools

14. The SRMA will meet with the individual schools. It is up to the school to agree with the SRMA who should represent them at this meeting, but it might reasonably include the head teacher, the school business manager or someone with responsibility for financial management, as well as the chair of governors. We encourage LA officers to attend the meetings with the schools where appropriate.
15. The SRMA will discuss their initial analysis of the school's data and will also agree a schedule of meetings with the appropriate people at the school. The SRMA is likely to spend a total of 1-2 days at each school. These may be full days or half days, spread over a longer period. The SRMA has **8 weeks** from their initial meeting with a school (or 10 days after their last meeting, whichever is shorter) to submit their report.

16. SRMAs will consider a series of questions about financial governance, resource allocation, benchmarking and ICFP. SRMAs will also make a series of recommendations for using resources to best effect, which may include suggesting ways to streamline and improve existing plans and practices, embedding ICFP, minimising burdens on staff and removing unnecessary workload. They should also discuss and signpost schools to the range of national deals and other tools and resources available.
17. The SRMA will identify the costed savings that each recommended action could generate and produce a first draft of their report. At the end of the deployment, the SRMA will hold a further meeting with the school(s), to which the LA is invited, to present their findings and discuss their recommendations. They will ask the school and the LA for their feedback and initial thoughts regarding their recommendations.
18. Where a school is developing a financial recovery plan, we would expect this to incorporate the SRMA's recommended actions where practical. The school will own its financial plan, which should set out how they intend to address the financial situation.

SRMA meetings with the LA

19. Prior to the SRMA's meetings with the school(s) the SRMA will meet with the LA. This is an opportunity for the LA to identify any specific points of concern and for the SRMA to ask initial questions to better understand the LA's perspective of the individual school's context. The SRMA will confirm any additional information they need from the LA ahead of their meeting with the school(s), as well as specific areas of consideration.
20. A further meeting with the LA will provide opportunity for the SRMA to consider the extent to which the LA is taking an integrated approach to curriculum and financial planning (ICFP) across all their schools. SRMAs may use their own ICFP diagnostic tools as well as the department's financial benchmarking tool, the SFVS and the workforce benchmarking tool. During these meetings, the SRMA will discuss and signpost the LA to the range of national deals and other tools and resources available to schools.

After the meetings

21. The SRMA will share their findings and the draft report for each individual school with the department, along with their draft LA Summary report. All reports are

quality assured to ensure clarity and factual accuracy. The case lead will raise any questions with the SRMA, although it is for the SRMA to make any changes to their report. The case lead will share the final reports with the LA and ask the LA to send the school report(s) to each individual school.

22. It is for the school, in collaboration with the LA, to decide which of the SRMA's recommendations they will take forward, based on their individual circumstances. They may not agree with every recommendation the SRMA suggests. However, the department would expect schools to implement recommendations that will help improve resource management and target funding to the areas that have the greatest impact on pupil outcomes. If the school decides not to take any of the recommendations forward, they should be able to explain why that is the right decision for the school.
23. When the department delivers the SRMA's report to the LA, the email will also include a link to our feedback survey. The views of the LA and schools are important, and the department uses this feedback to understand what is working and what more it can do to improve the programme to best support schools.
24. Six months after the department sends out the SRMA's report, the department asks schools to complete an evaluation workbook, that sets out the SRMA's original recommendations and asks for actual and planned savings against each one. Where the school(s) are not planning to take recommendations forward, or where they have not yet finalised their plans, they will be asked to provide a short narrative explaining their reasoning. The workbook is not intended to question the school's progress on delivering their plans as it is up to them to decide whether things the SRMA has suggested are appropriate for their context. The process is intended to help the department measure the impact of the SRMA programme and better understand its value for the sector. This feedback also helps the department to further tailor the programme to meet schools' needs in future.
25. The department may contact the LA to discuss potential case studies to support the department's understanding of where the SRMA programme added value and where it may benefit from improvement.
26. The department's Schools Commercial Team may offer targeted support through the Get Help Buying for Schools service and may contact the LA to discuss procurement support and approved frameworks in more detail.
27. In some instances, an LA or school may want further advice or support following a deployment and may ask an SRMA or their supplier organisation to provide

this. While we are clear that the purpose of a deployment is not for SRMAs to promote their own independent consultancy offer, the department is supportive of SRMAs continuing to provide support to LAs/school(s) where this is requested, needed, and represents good value for money. Any ongoing support must be agreed independently between the LA/school(s) and the SRMA, taking account of the LA/school(s) procurement processes and SRMA's own contractual obligations and other commitments.