



Department  
for Education

# **Monitoring progress and impact of the strategy**

**School Resource Management: Building  
A Stronger System**

**June 2023**

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## Introduction

School resource management: building a stronger system, published in June 2022, sets out the department's offer and approach to supporting schools and academy trusts to get the best value from all their resources. Working in partnership with the sector, the strategy describes how we will support every school and academy trust to:

- Have access to people with the skills, knowledge and capacity to achieve effective resource management;
- Recruit and deploy teaching and non-teaching staff even more efficiently and effectively; and
- Get the best value and impact from their non-staff resources.

This note sets out how we will monitor and report on the progress and impact of this strategy, including through:

- Measuring the savings schools have realised through their use of SRM tools and services, which they can then reinvest in school priorities and improving pupil outcomes.
- Assessing the effectiveness of resource management practices and financial decision-making across the schools' sector; and analysing data and information from schools and across the sector to help us identify how this may be changing over time.
- Tracking engagement with, and use of, SRM tools and services. We want to further expand and develop our offer to reflect the changing needs of schools and maximise their reach and impact across the sector, so that all schools and academy trusts can benefit from any efficiencies generated.
- Monitoring wider systemic trends in schools' financial health distribution of spend and the school business profession, to help us assess the strategy's impact and progress of embedding excellent resource management across the system.

# Supporting the sector to create £1bn of reinvestment opportunities

## Our aim

As set out in the White Paper [Opportunity for All](#), the SRM programme has already supported schools to make £1bn savings since 2015-16, against a counterfactual based on maintaining per-pupil non-staff spend in real terms at 2015-16 levels<sup>1</sup>. Building on this, we have committed to expand and refine the programme to secure a minimum of a further £1bn of reinvestment opportunities by 2027.

## What we will measure and publish

We will seek evidence of progress towards this target by monitoring the total savings realised through use of SRM initiatives<sup>2</sup>, which schools can then target in line with their own priorities for their pupils' education. We are continuing to work with schools and with schools sector representatives to refine our offer and maximise opportunities for SRM to provide support. The suite of tools and services on offer through the SRM programme will grow and evolve over the coming years, in response to the changing needs of the sector and the wider economic context. While the precise contribution of individual initiatives to the £1bn target is therefore also likely to change over time, the Department estimates that:

- Just over half of efficiencies will be unlocked through schools' use of the commercial deals and procurement support on offer through the Schools' Buying Programme;
- Up to a further 25% will be delivered through the additional reinvestment opportunities realised by schools following a School Resource Management Adviser visit; and
- The remainder will be achieved through schools' use of the wider suite of SRM tools and services, principally those such as Digital Standards and Connect the Classroom designed to help schools get best value from their use of digital technology.

The method for calculating the savings realised will vary for each element of the offer. For example, the savings realised by schools accessing specialist procurement advice and support through Get Help Buying for Schools are calculated as the difference between the price paid for a contract, lease or purchase and the previous price paid or, where this isn't available, against a benchmark recommended or average retail price. Efficiencies from Digital Standards and associated digital services will be estimated using management information on service usage and on schools' technology spend. Savings

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<sup>1</sup> [School savings in non-staff expenditure](#) sets out our analysis and the evidence underpinning this

<sup>2</sup> This target does not reflect the total financial benefits we expect the SRM programme to deliver. It captures only those elements of the offer where savings can reasonably be measured and attributed to SRM activity.

realised through opportunities identified by a School Resource Management Adviser will be identified using information provided by participating schools and academy trusts. Calculation of savings from Teaching Vacancies and the Risk Protection Arrangement will rely more on spend in comparison to a counterfactual (i.e. what these would otherwise cost the schools).

Final data on the value of efficiencies realised through schools' use of the SRM offer from 2022-23 to 2026-27 will be published by 2028. We aim to publish an interim update reporting on progress towards the target. We also anticipate providing updates on performance of some of our initiatives, as part of key performance indicators for the Education and School Funding Agency (ESFA).

# Supporting schools to make better informed financial decisions

## Our aim

Our vision is a school system and culture in which effective resource prioritisation and financial decision-making are recognised as key to delivering an excellent education. To understand whether this aim is being achieved, we must look beyond evidence of quantifiable savings and ensure our evaluation of the programme's impact also considers wider trends in the adoption of effective school business practices, informed by use of SRM tools and services.

## What we will measure and publish

We already collect evidence of some aspects of SRM practices through the annual School Business Professionals (SBP) survey, which has helped to shape the evidence base underpinning Chapter One of the 2022 SRM Strategy ('Supporting professionals to achieve effective SRM')<sup>3</sup>. We will review the SBP Survey, so that we can use it to monitor key aspects of SRM practice, for example, to identify whether schools or trusts' financial plans are integrated with their plans to improve pupils' outcomes, to understand what actions are being taken following use of benchmarking tools and to explore the impact of using recommended frameworks. We will use this information to support our evaluation of the wider SRM strategy and the design and implementation of new initiatives to strengthen school business capability. We expect to publish findings on an annual basis, starting in 2024.

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<sup>3</sup> Existing analysis from both sources can be found on the [DfE SRM collection page](#).

# **SRM utilisation and engagement**

## **Our aim**

Building on the strong progress that many schools and academy trusts have already made in embedding excellent school resource management, we want to extend the reach and take-up of the offer to enable all schools to take full advantage of the support available.

## **What we will measure and publish**

We will use a survey to monitor annual trends in use of SRM tools and services among a representative sample of schools and academy trusts. This will help to identify whether changing patterns of usage are being driven by a particular group of schools and academy trusts or if they are evenly spread across the sector; or whether the SRM toolkit is reaching a greater number of schools or if broadly the same schools are accessing more elements of the offer. We will aim to minimise the survey burden as much as possible, including by seeking to adapt existing vehicles such as the SBP Survey.

We will publish a summary of findings, including our estimate of the proportion of schools, based on the survey sample, that are already making use of more than one element of the SRM offer. Taking this first data point as a baseline, we will monitor the changing proportion of schools using multiple elements of the offer, reporting on progress annually from 2024.

## Monitoring wider systemic trends

To provide a balanced, holistic picture of progress in embedding excellent school resource management across the system, we will supplement the quantitative and qualitative success measures set out above with system-level data illustrating broader contextual trends in schools' financial health and sustainability. This will support the ongoing growth and evolution of our offer of tools, guidance, training and support, based on the wider context and the needs of schools and academy trusts. We intend to monitor the following trends:

- Proportion of academy trusts and local authority maintained schools in cumulative deficit
- Changes in the distribution of schools' spending across different expenditure categories, including exploring whether there is any correlation with levels of SRM utilisation and engagement

Through the SBP Survey and planned enhancements to the Schools Workforce Census, we will also gather and annually monitor important data on the school business profession – a vital enabler of the SRM Strategy's aims:

- Numbers of SBPs across different roles
- Recruitment and retention
- Salaries and qualification levels
- Characteristics of professionals



## **Next steps**

We will continue to work in partnership with the sector to help support the further take up of tools, support and guidance and will provide further updates on developments and data in coming years.



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