

Guidance

# School resource management advisers: information for local authorities and maintained schools

Updated 15 June 2023

## Applies to England

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# 1. About school resource management advisers

The Department for Education continues to offer independent and accredited school resource management advisers (SRMAs) to support local authorities, 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. There is no charge for this service.

SRMAs may be practicing school business managers and school leaders, currently working in schools or academy trusts, 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 the 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 \(https://www.gov.uk/contracts-finder\)](https://www.gov.uk/contracts-finder) website.

SRMA deployments are funded by the department. Schools and local authorities do not have to pay for this support. However, local authority approval and confirmation of a school's engagement is required before a deployment can take place.

## 2. Overview and purpose of an SRMA deployment

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.

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 which, could be reinvested in the areas that are of most importance in delivering the best possible education to pupils.

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.

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 the senior leadership team (SLT) and governors. They will discuss the school's data and their approach to financial and resource management and obtain a better understanding of their vision and the challenges the school faces.

The SRMA will discuss the range of school resource management tools and guidance available, with a focus on 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.

As part of an SRMA deployment to school(s) the local authority has the option of having a local authority summary report which is a separate report, written specifically for the local authority. It often includes local authority level recommendations and opportunities for the local authority to consider, as well as identifying areas of good practice within the local authority. To write this report, the SRMA will schedule meetings with the LA to consider how they approach budget monitoring with their schools and the extent to which the LA utilises integrated curriculum financial planning (ICFP).

At the end of the deployment, the SRMA will discuss their findings with the school and the local authority where appropriate and present recommendations for the school to consider. It is up to each school, in collaboration with their local authority, to decide which recommendations they want to take forward. The SRMA may ask the school for their initial feedback at this point.

SRMAs will produce a draft report for each school within the deployment, which follows a standard template but can be adapted to suit each setting. The report will include 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 local authority to send on to the school.

As part of the SRMA deployment, schools will be expected to complete an evaluation workbook. The workbook helps the department measure the impact of the programme and gather feedback to ensure the programme continues to meet schools' needs and is also an opportunity for the school to consider progress and next steps. The evaluation workbook will be requested six months following the report(s) being issued. However, the department will be in touch prior to this time to offer the school(s) the opportunity of a follow up deployment to support them with completing the evaluation workbook and with implementing the recommendations should this be required.

# 3. Before the SRMA's meetings with the local authority and schools

Once a deployment has been agreed, by both the local authority and the school(s), the school(s) will be asked to complete a data information sheet in collaboration with the local authority, which will assist the department in commissioning the most suitable SRMA.

The department will commission an SRMA from one of two suppliers: the Institute of School Business Leadership (ISBL) or North Yorkshire County Council (NYCC). The case lead will contact the local authority to confirm the allocated SRMA's name and check there is no conflict of interest from either the local authority 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 local authority.

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.

The department will brief the SRMA on the background to the school(s) and highlight any areas of possible focus for their meetings, after which a virtual conversation between the case lead, SRMA and local authority 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 local authority and the school(s), as well as the things they will want to have sight of during the meeting.

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:

## 3.1 Before 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 full-time equivalent (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

## 3.2 During the meeting:

- management accounts, budget projections and medium-term financial plan
- local authority scheme for financing schools and local authority finance policy
- latest governing body or interim executive board meeting or finance committee meeting reports and minutes
- local authority audit reports
- any recent relevant schools forum decisions
- the level of finance support provided by the local authority either as part of its statutory duties or via a traded service
- any local authority school place planning issues which may impact on school organisation, for example: pupil numbers, potential federation options or, move from three tier to two tier

The SRMA will use the information that the local authority and school(s) provide to develop an understanding of the school's financial health and approach to school resource management. The SRMA will also make comparisons against benchmarks and 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 \(https://www.gov.uk/guidance/integrated-curriculum-and-financial-planning-icfp\)](https://www.gov.uk/guidance/integrated-curriculum-and-financial-planning-icfp), [financial benchmarking tool \(https://schools-financial-benchmarking.service.gov.uk/\)](https://schools-financial-benchmarking.service.gov.uk/), the [self-assessment and the workforce-benchmarking tool \(https://department-for-education.shinyapps.io/schools-workforce-benchmarking/\)](https://department-for-education.shinyapps.io/schools-workforce-benchmarking/).

## 4. The SRMA's meetings

Where possible, we suggest the SRMA should conduct their meetings in-person, as this helps them to better understand the school's context and 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. During all meetings, we expect all stakeholders to conduct themselves in accordance with the [Nolan Principles. \(https://www.gov.uk/government/publications/the-7-principles-of-public-life/the-7-principles-of-public-life--2\)](https://www.gov.uk/government/publications/the-7-principles-of-public-life/the-7-principles-of-public-life--2)

### 4.1 SRMA meeting with the schools

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 local authority officers to attend the meetings with the schools where appropriate.

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 to 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.

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.

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 local authority is invited, to present their findings and discuss their recommendations. They will ask the school and the local authority for their feedback and initial thoughts regarding their recommendations.

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.

## **4.2 SRMA meetings with the local authority**

Prior to the SRMA's meeting with the school(s), the SRMA will usually meet with the local authority. This is an opportunity for the local authority to identify any specific points of concern and for the SRMA to ask initial questions to better understand the local authority's perspective of the individual school's context. The SRMA will confirm any additional information they need from the local authority ahead of their meeting with the school(s), as well as specific areas of consideration.

A further meeting with the local authority will provide opportunity for the SRMA to consider the extent to which the local authority is taking an integrated approach to curriculum and financial planning across all their schools. This meeting will also allow the SRMA to ask relevant questions in relation to the local authority's budget monitoring systems, which will support the completion of the local authority summary report if this is required. SRMAs may use their own ICFP diagnostic tools as well as the department's financial benchmarking tool, the Schools Financial Value Standards (SFVS) and the workforce benchmarking tool. During these meetings, the SRMA will discuss and signpost the local authority to the range of national deals, tools and resources available to schools.

## **5. After the meetings**

The SRMA will share their findings and the draft report for each individual school with the department, along with their draft local authority summary report, where

applicable. 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 school report(s) with the local authority and ask for the report(s) to be sent to each individual school.

It is for the school in collaboration with the local authority 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. When the department delivers the SRMA's report to the local authority, a link to a feedback survey will be included. The views of the local authority 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.

## **5.1 Follow up and evaluation workbook**

The department requires the completion of an evaluation workbook for all deployments 6 months after the reports are sent to the local authority. The workbook is not intended to question the school's progress on delivering their plans as it is up to them to decide whether the SRMA's recommendations are appropriate for them. Where schools 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 to explain their reasoning. 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.

To support schools with completing their workbook, four months after the reports are sent to the local authority, the department will offer an SRMA follow up deployment. This offer is optional and is aimed at supporting the school(s) in implementing the recommendations set out in the original report and help with the completion of the evaluation workbook. As part of the follow up deployment, the SRMA will produce a short report, summarising their key findings and provide further recommendations and advice where appropriate. The report will be shared with the school(s) and LA upon completion of the deployment.

The department may contact the local authority 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. The department's Schools Commercial Team may offer targeted support through the Get Help Buying for Schools service and may contact the local authority to discuss procurement support and approved frameworks in more detail.



In some instances, a local authority 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 local authorities and school(s) where this is requested, needed, and represents good value for money. Any ongoing support must be agreed independently between the local authority or school(s) and the SRMA, taking account of the local authority and school(s) procurement processes and SRMA's own contractual obligations and other commitments.

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