



THE BENEFITS OF INDEPENDENT ADVICE

In the Autumn 2021 issue, we discussed the school resource management adviser programme and its impact on improving school finances. As the programme continues, we hear first-hand the positive impact that these visits provide from a satisfied school business professional and from the adviser who provided the support and recommendations.



Cath Marcus

Funded by the Department for Education, school resource management advisers (SRMAs) are specialist school business professionals with considerable experience of managing resources in the education sector. Acting as independent advisers, SRMAs support trusts and schools with resource management by reviewing key financial and staffing metric data and then suggesting alternative uses for available resources and finding more efficient ways to deliver the best possible educational outcomes for your pupils.

The reasons for an SRMA visit are twofold: First, a school may be financially stable but is looking at more

efficient ways to optimise resources and potentially reduce unnecessary spending; and second, if a school is, or forecasted to be, in deficit, then the SRMA will ►

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Rebecca Beaver



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support the school in identifying possible strategies that will lead to a more positive financial outcome. Either way, at the end of each visit, the SRMA will provide a report containing recommendations that the organisation can choose to take forward.

A positive visit

At the heart of an SRMA's work is integrated curriculum financial planning (ICFP).¹ This management process helps schools plan the best curriculum for their pupils with the funding available by measuring current curriculum staffing structure and finances and using the data to create a three- to five-year plan that can help achieve educational success and financial stability.

Cath Marcus, Chief Financial Officer at Cobham Free School, has implemented a number of recommendations following Rebecca Beaver's visit to the school. Rebecca is Resource and Business Management Adviser for RBMA Consultancy and has 20 years' experience working in the education sector, plus 15 years prior to that working in business, finance and purchasing.

Cath explains the reason for Rebecca's visit. "We had submitted a business case to the Education and Skills Funding Agency (ESFA) in relation to funding a significant increase in pupil numbers. As part of the approval process, the ESFA requested an SRMA visit to establish whether the school could financially accommodate the increase."

Rebecca had an initial face-to-face meeting with Cath plus Michaela Khatib, Chief Executive Officer, and Howard Morris, Chair of Trustees, to understand the context of the trust. "It was very clear from this meeting that leaders and trustees were passionate and ambitious about the school," says Rebecca, "and it was also evident that this was a complex case that required clarity around the budget pressures."

This meeting gave the trust the opportunity to share information with Rebecca that informed the review, which, Cath says, "was helpful in assessing certain areas of the school's finances and the presentation of these figures."

Rebecca then held several telephone discussions and communicated via email to clarify data and resolve queries. Then, a final meeting was held with key stakeholders to discuss her findings and recommendations. "Key to these discussions was consideration of achievability, impact, and any barriers to implementation," explains Rebecca.

The recommendations

So what did Rebecca's report say? "Several recommendations were discussed with the school

that offered the trust options relating to resource management and easing budget constraints. This included reviewing non-staffing expenditure on catering, premises cleaning and waste management, learning resources, and recruitment fees. An ICFP review indicated an analysis of teaching staff expenditure was appropriate because this was exceeding the highest benchmark by approximately six per cent, combined with a very low pupil-to-teacher ratio and teaching contact ratio.

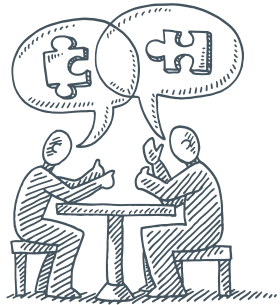
"As an SRMA, I offer options for a school or trust to consider. It is not a case of 'you are spending X above the highest benchmark; you need to spend Y'; it is more 'you are spending X above the highest benchmark; a review is recommended to explore what you are gaining from that additional investment, and is it still appropriate given the circumstances the school is in today?' Sometimes the recommendations sit around income, as they did with Cobham. Simple measures such as ensuring that all pupils who are entitled to additional income are detailed in the census return can make a significant difference to a school budget. For example, schools are often not aware that where unusual circumstances affect pupil attendance on census day – such as severe weather or religious observances – a day and time when the situation is regarded as normal can be used."²

A significant number of Rebecca's recommendations have been implemented so far, as Cath explains. "Rebecca's ICFP review of our primary and secondary departments to optimise teacher contact ratio has led to successfully adjusting our staffing model and teacher contact ratio. We have also strengthened our admin support team to include a development officer who is focusing on income generation, including increased rental income, grant applications and sponsorship, which will help with relieving deficits."

Final thoughts

Rebecca's visit was certainly a positive experience for Cath. "It was a good opportunity to have an independent review by an experienced business professional. Rebecca's wealth of experience from carrying out similar reviews at other schools enabled the sharing of ideas that had been implemented elsewhere. This felt like a collaborative process and that we were all working with the same aim of achieving the best outcome for the pupils by maximising the use of resources. We appreciated that Rebecca took into account the individual circumstances of the school and its values rather than trying to suggest a one-size-fits-all approach."

As for Rebecca, she felt the trust carefully considered which of the recommendations would help them without impacting negatively on outcomes. "It was an absolute pleasure to work with a team of leaders and trustees who were open to the process and who engaged fully in the review, with a commitment that they would not compromise on the curriculum offer that sat central to their initial proposal for the school." ■



INFO

- 1 For more information about how integrated financial planning can help with your finances, visit www.isbl.org.uk/school-resource-management-and-icfp
- 2 Further information on unusual circumstances that may affect your school's census can be found at: www.gov.uk/guidance/complete-the-school-census/census-dates