

SCHOOLS FORUM

Meeting date: 16th January 2019

**From: Daniel Barton
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SRMA (SCHOOL RESOURCE MANAGEMENT ADVISOR) CUMBRIAN PILOT PROGRAMME UPDATE

1.0 EXECUTIVE SUMMARY

- 1.1** *Nationally, the ESFA (Education and Skills Funding Agency) has been working on a programme to promote better financial management in schools.*
- 1.2** *The programme, initially referring to those delivering the service as School Efficiency Advisors (SEAs), was available to academy schools only.*
- 1.3** *Following discussion with the ESFA, DfE and a Cumbrian SEA, work was undertaken, with sign-off from the Cumbrian Schools Forum in spring 2018, to explore a further development of this programme, to enable Local Authority maintained schools to benefit.*
- 1.4** *A working party sub-group of the Schools Forum has been steering the development of the programme*
- 1.5** *The following serves as an update as to progress.*

2.0 STRATEGIC PLANNING AND EQUALITY IMPLICATIONS

- 2.1** Ensuring that all Cumbrian schools are equally well supported with management of finances is supportive of all of the Council Plan outcomes.

3.0 RECOMMENDATION

- 3.1** The Schools Forum notes this summary progress report, activity undertaken this far, and proposed next steps

4.0 ACTIVITY IN 2018

- 4.1 The extension of the SRMA programme as a Cumbrian pilot for deployment in Local Authority maintained schools was proposed at Schools Forum in the spring of 2018, and raised as a proposal at the meeting of Cumbrian school business managers association (CASBAM) on 10 October 2018.
- 4.2 An update brought to Schools Forum on 16 October 2018.
- 4.3 Recruitment of volunteers from within the cohort of Cumbrian school business managers was sought, with a total of six volunteers forthcoming in the initial rounds, from across the primary and secondary phases.
- 4.4 Of the initial cohort, a total of three have been trained and have undertaken an accredited qualification. 100% of Cumbrian candidates have been successful thus far.
- 4.5 The remainder of the initial cohort will undertake training and assessment very shortly.
- 4.6 Thus far, four Cumbrian secondary academy schools have undertaken an SRMA review. Visits were received and engaged with positively, and a significant level of *possible* savings identified in each school.

5.0 NEXT STEPS

- 5.1 With 3 Cumbrian SRMAs now available for deployment, the steering group, in conversation with stakeholder groups (LIS, LA Finance Department, CASH, and PHA) will identify schools which might benefit from an SRMA visit.
- 5.2 *Case study summaries and testimonials from earlier SRMA visits will be developed for use in 'selling' the potential value of the programme.*

6.0 CONCLUSION

- 6.1 The Schools Forum members are asked to note the summary update report and raise questions in relation to the proposed next steps for deployment.

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