

# **SCHOOLS FORUM**

**Meeting date: 29<sup>th</sup> October 2019**

**From: Dan Barton  
Assistant Director – Education & Skills**

## **SCHOOL RESOURCE MANAGEMENT ADVISORS (SRMA) UPDATE**

### **1.0 EXECUTIVE SUMMARY**

- 1.1 *This report updates the Schools Forum members on the progress of the Schools Resource Management Advisors (SRMA) programme.*

### **2.0 STRATEGIC PLANNING AND EQUALITY IMPLICATIONS**

- 2.1 *Improving the management of resources is supportive of the Council Plan outcome that ‘People in Cumbria are healthy and safe’.*

### **3.0 RECOMMENDATION**

- 3.1 *The Schools Forum is asked to note the contents of this paper and the action that the local authority is taking to support maintained schools that are in financial difficulty.*

### **4.0 BACKGROUND**

- 4.1 In 2017, DfE announced that it would be recruiting SRMAs to go into schools from January 2018 as part of a pilot programme to help schools balance their budgets and to demonstrate the link between strong financial management, school improvement and pupil outcomes. The support was free of charge to schools and in June 2018 the ESFA selected Cumbria County Council to take part in the pilot programme having already established a Schools Forum working group following concern about the number of maintained schools in deficit and declining surplus balances.
- 4.2 Four schools were selected to take part in the ESFA pilot and the SRMA approach of providing an independent and impartial assessment of the schools financial health was well received and as a result it was agreed between the ESFA and Cumbria that the standards, approach and systems

developed by the ESFA national programme should be developed into a local programme and funding made available through the School Improvement Monitoring and Brokering Grant to deploy nationally accredited SRMAs to carry out local SRMA deployments in Cumbria. A report was presented at the Schools Forum meeting held on 3<sup>rd</sup> July 2018 on the role of School Efficiency Advisors (now referred to as School Resource Management Advisors) which sought to expand the number of SRMAs within Cumbria in order to strengthen financial and educational outcomes.

## **5.0 OUTCOME OF THE PILOT PHASE**

5.1 The four schools that took part in the pilot stage were:

- Ulverston Victoria High School
- The Lakes School
- Netherhall School
- Dowdales School

5.2 The net projected deficit of these schools at the time of the deployments taking place for financial year 2019-20 was £2.375m. Following the deployments a report for each school was prepared by the SRMA which identified a number of potential recommended savings options for the schools to consider together with a financial risk assessment. In total the estimated potential savings identified for the four pilot schools was £2.4m over three years. This figure included strategies to increase funding through increasing pupil numbers which, whilst a priority for all pilot the schools, is not easily achievable. The schools were asked to consider each recommendation in turn and draw up an action plan detailing the recommendations that had the potential to be taken forward and, with the approval of their governing body, submit a recovery plan for review by the local authority.

5.3 The recommendations included a number of common themes where there was potential to make savings. A key area was the savings that could be achieved through either increasing class sizes or increasing teacher contact time and involved the schools being open to sharing details of their curriculum plan timetable and the deployment of its teachers to establish the classroom costs, a process commonly referred to as integrated curriculum and financial planning.

5.4 Three of the schools have sixth forms and recommendations included reviewing the range of subject options available, increasing class sizes or combining year 12 and 13 classes where possible. Other areas for review included support staff, senior leadership teams, curriculum offer, procurement and contract review savings.

5.5 The current net projected deficit of the four schools that took part in the pilot is £1.687m for 2019-20, a reduction of £0.688m from their original predictions for the same year. Following the SRMA recommendations, two schools subsequently started redundancy proceedings and this measure has saved the schools a total of £0.491m over three years. However, all four pilot schools are still predicting in-year deficits and further work is required by the schools to return to a financially sustainable position. The level of continued support from the local authority in returning these

schools to a financially stable position will be assessed once the schools have submitted their revised October budget plans and the full impact of the 2020-21 school budget shares is known.

## **6.0 ROLL OUT OF CUMBRIA SRMAS**

- 6.1 Following the pilot stage, expressions of interest were received from 4 Cumbria school business managers who have all completed the Institute of School Business Leadership (ISBL) Induction and Accreditation Process and are now working with the local authority on the local programme. The SRMAs include experience of both the primary and secondary sectors.
- 6.2 Following the submission of the May budget plans 21 schools have been identified by the local authority as potentially benefiting from an SRMA deployment. This includes 5 maintained nursery schools, which following changes to the early years funding formula and the uncertainty surrounding the continuance of the maintained nursery supplementary grant after August 2020, will need to review their expenditure plans to ensure that they remain financially viable going forward.
- 6.3 The deployments will be allocated on a priority basis and are also dependent on the availability of the SRMAs who, under the national SRMA programme, are required to complete at least 2 deployments a year in addition to the local Cumbria deployments. However, between now and the end of this financial year it is planned that 10 local deployments will take place.
- 6.4 A report will be presented to Schools Forum on the outcome of the forthcoming deployments and the impact of the savings achieved in due course.

## **7.0 OPTIONS**

- 7.1 There are no options, the Schools Forum is asked to note the progress made through the local SRMA programme and the action that the local authority is taking to support maintained schools in financial difficulty.

## **8.0 RESOURCE AND VALUE FOR MONEY IMPLICATIONS**

- 8.1 Resource and value for money implications are considered throughout this report.

## **9.0 CONCLUSION**

- 9.1 This paper updates the Schools Forum on the SRMA programme.

**Amanda Chew**  
**Finance Manager – Education & Skills**

*4<sup>th</sup> October 2019*

---

## **REPORT AUTHOR**

Contact:

Amanda Chew

Finance Manager – Education & Skills

Email: [amanda.chew@cumbria.gov.uk](mailto:amanda.chew@cumbria.gov.uk)

Telephone: 01228 226560