



Department
for Education

School Resource Management:

Building a stronger system

June 2022

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Summary

This publication sets out the department's offer and approach to supporting schools and academy trusts to get the best value from all their resources. Our ambition is to ensure every individual responsible for the management of school resources can make the best possible decisions, based on an understanding of best practice.

Review date

This strategy will be reviewed before June 2027.

Who is this publication for?

This strategy is for:

- Executive leaders, school leaders, school business professionals, teachers and support staff in all schools and academy trusts.
- All responsible boards, including governing bodies for local authority maintained schools and boards of charity trustees for academy trusts

Main points

Building on '[Supporting Excellent School Resource Management](#)', this strategy outlines how we will work with schools and academy trusts to empower school leaders, executive leaders, school business professionals and boards to make effective financial decisions, which target valuable resources towards the best outcomes for pupils.

This strategy sets out the actions we will take to:

1. Support schools and academy trusts to achieve effective School Resource Management (SRM) by investing in development for school business professionals and supporting a culture that values and rewards their skills. We will also strengthen training for boards so all schools and academy trusts can access knowledgeable and skilled people who understand the importance of excellent SRM.
2. Enable schools to develop and deploy their workforce effectively and efficiently to maximise impact, including teaching assistants. We will support schools and academy trusts to develop a culture that embraces flexible working and reduces planning time through digital services. We will support schools to streamline recruitment and reduce associated costs.
3. Support schools and academy trusts to maximise the impact of their non-staff spend, through reducing purchasing costs, supporting effective estate management, supporting better value and use of digital technology, and improving how schools and academy trusts use benchmarking data to inform decisions.

Foreword from the Minister of State for School Standards



Every child and young person deserves an excellent education to realise their full potential. In our White Paper “[Opportunity for All](#)”, we set out our vision for achieving this, building on the strengths of great teachers, school leaders, and other professionals.

We know that teachers succeed by their outstanding commitment, professionalism, and creativity but they also need the right resources and the support of others who work alongside them - within and outside the classroom.

This government is committed to levelling up opportunity for all children and young people. We have delivered the biggest funding boost for schools and academy trusts in a decade, and continue to deliver year-on-year, real terms per pupil increases to school funding. We will invest a further £7 billion by 2024-25 for the core schools budget in England, compared to 2021-22.

Never has it been more important for us to work together to ensure these resources are targeted in the right place to support each and every young person. Rises in energy costs and inflation are creating new challenges, and we are still managing the impacts of coronavirus (COVID-19) across the sector. I am committed to ensuring teachers, leaders, teaching assistants, finance professionals and others working within schools and academy trusts have access to the tools, guidance and front line support they need to excel.

Excellent resource management is about focusing and using resources to create a positive, supportive and professionally enriching environment, striving to achieve best practice using tools, techniques, and technology to encourage innovation and target resources towards what is most important – the needs of our young people. It means putting in place the foundations for a digitally mature education system, so that school and academy trust leaders and teachers can make the most of the benefits digital technology offers, and that data-driven insights can empower our decision makers at every level in the sector. It also means using data and tools to manage the assets of the school estate well.

This new strategy, which builds on the first phase of “[Supporting Excellent School Resource Management](#)”, sets out how we will expand our offer of help. It has been

developed in partnership with the sector, drawing on their experiences of what schools and academy trusts need and want.

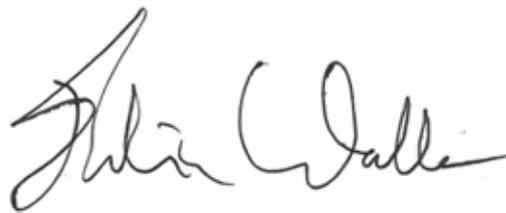
It focuses on how we can work together to further recognise the essential contributions of everyone involved in financial management, including school business professionals, and all those involved in managing school finances, while supporting them with their own professional development.

It offers support to schools and academy trust leaders to focus on and invest time in the things our young people need, while striving to ensure staff have a reasonable work/life balance and time for professional development. Creating a supportive culture for everyone to thrive is critical to the future of the sector.

The strategy also sets out the next phase of our offer of direct support to help schools achieve efficiencies and get the best value from every pound of taxpayers' money they spend.

While "Opportunity for All" outlined our vision for a trust-led system by 2030, this strategy is relevant to every school now. Therefore, my ambition is that every school, whatever their setting, makes use of the School Resource Management (SRM) offer and together, we constantly strive to ensure resources are targeted to the right places.

I want to end by thanking you for your resilience and leadership so far. We now need to look ahead to the future, work together, and share best practice, so we can develop an even stronger education system to ensure a successful future for our young people.

A handwritten signature in black ink, appearing to read "Robin Walker". The signature is fluid and cursive, with a large initial 'R' and 'W'.

Robin Walker MP

Minister of State for School Standards

Foreword from the Institute of School Business Leadership



A school's resources are not limited to tangible objects – they are everything: the people we develop, the quality of our leaders, the premises we occupy, the technology we use, and the equipment and facilities we rely on to deliver high-quality teaching and learning.

How we manage and deploy these precious resources can be defining to the success of our schools and trusts. Effective resource management necessitates an integrated approach to leadership where the three pillars of pedagogy, business and governance work seamlessly together and shoulder the responsibility equally. It also requires access to highly skilled and experienced school business professionals and robust governance oversight.

The Institute of School Business Leadership welcomes the emphasis on the importance of SRM within the White Paper and subsequent refreshed SRM strategy and the extent to which it places school business professionals at the centre of improvements. Over the years, the Department for Education has developed a suite of guidance, tools and access to data that facilitates the optimal use of resources and helps schools and trusts benchmark their approach. The new SRM strategy includes further investment in training, a commitment to encouraging greater engagement from all school leaders, and the continuation of the successful School Resource Management Adviser (SRMA) programme.

This refreshed SRM strategy also expands on the existing range of resources, with new tools, support and guidance underpinned by the lessons learned during the last three years.

Stephen Morales

CEO, Institute of School Business Leadership

Introduction

Excellent School Resource Management (SRM) is about schools¹ and academy trusts² investing and targeting valuable resources as effectively as possible to secure the best outcome for pupils, and value for money for the taxpayer. It is about pursuing a culture in which effective resource prioritisation and financial decision-making are recognised as key to schools' core mission of delivering a world-class education.

The overall ambition of this strategy and offer is to equip every individual responsible for the management of school resources to make the best possible decisions, including effective use of technology to improve digital resilience. We recognise that academy trusts and schools will deliver excellent SRM in accordance with their structure and role as part of the school system. It is for the board³ to determine the SRM strategy across the school(s) in their remit, in accordance with their structure and role. But executive leaders, school leaders, and the wide range of school business professionals⁴ (SBPs) and other staff who are responsible for resource management in schools and academy trusts are, together, critical to ensuring this strategy is used to support excellent practice.

We know lots of schools and academy trusts do this well already and there are beacons of excellence across the sector. The sector has shown extraordinary resilience in dealing with the challenges caused by the Covid-19 pandemic. We have also seen increased pressures on staffing, and significant cost of living pressures, including rapid rises in the cost of energy which we know will impact schools.

This strategy is relevant to, and supports, all schools and academy trusts, helping them to target their resources effectively. It is also relevant to local authorities (LAs) and diocese/religious bodies. We want to work in partnership with the sector to help drive a step change in the way SRM is prioritised and delivered. Ultimately our ambition is that, in future years, when all schools are part of an academy trust in an independent, sustainable school system, schools and academy trusts maximise every opportunity to pursue excellent resource management. Our children and young people deserve nothing less.

¹ Throughout this document we use the term 'schools' to mean all state schools in England, including local authority maintained schools, academies and free schools, voluntary aided and voluntary controlled schools, foundation schools, schools with a religious character, SEND and alternative provision settings. This also includes maintained nursery schools and early years settings within a school setting. Where it is important to distinguish between different types of settings we have done so.

² Includes single academy trusts (SATs) and multi-academy trusts (MATs). Academy trusts are set up as charitable companies limited by guarantee.

³ In an academy trust the accountable body will be the board/trust board of charity trustees; in a local authority maintained school, the accountable body will be the governing body or federation body.

⁴ School Business Professional (SBP) is a term for a range of roles that contribute to the common goal of ensuring schools and academy trusts operate to deliver the best education to their pupils. This includes responsibility for one, or more than one, school business function, across finance, operations, commercial, human resources, and estate management.

Strategy Overview

This strategy is an enabler – it aims to provide schools and academy trusts with resource management tools, capability and confidence to support the delivery of the aims within “[Opportunity for All](#)”. It can help secure the benefits and economies of scale that can be achieved through families of schools coming together and pooling expertise and resources.

We have worked with a range of experts and system leaders in developing this strategy. They have told us what government needs to do to help our school leaders achieve outstanding financial effectiveness.

People are at the centre of our approach: the executive leaders⁵, school leaders⁶, boards, the wide range of school business professionals (SBPs), teachers, and support staff – all of the people that play a role and are crucial to managing resources in schools and academy trusts strategically and effectively, in support of excellent outcomes for pupils. We need to continue to work in partnership with the sector to ensure every school and academy trust has access to people with the skills, knowledge and capacity to achieve effective resource management.

In our original [School Resource Management \(SRM\) strategy](#) published in 2018, we set out our ambition to help schools and academy trusts with costs of recruitment. Now we want to go beyond this to support all schools and academy trusts to recruit and deploy their teaching and non-teaching workforce even more efficiently and effectively.

Finally, we want to build on the progress made since our first strategy, to enable all schools and academy trusts to make the resource management decisions that will unlock efficiencies and help them deliver their ambitions. Our range of tools and resources, including direct, expert support, are not intended to be exhaustive or final, but to target key areas that schools and academy trusts tell us can help, and have been shown to be successful⁷. This includes support for the sustainable, long-term use of technology to improve outcomes and efficiencies.

We want every school and academy trust to consider our offer and use the tools – or suitable alternatives – to help ensure they are achieving excellent school resource management. All elements of the SRM offer can be accessed through our [GOV.UK collection page](#), including how to request free expert support from our advisers. Through our offer, we aim to help schools and academy trusts collectively unlock £1 billion of efficiencies for them to reinvest to secure excellent outcomes and meet the vision set out

⁵ By executive leaders, we mean those held to account for the performance of the organisation by the board, including Chief Executives, Chief Financial Officers, Chief Operating Officers and Boards.

⁶ School leaders include all members of the leadership team in a school that may have a role in managing school resources, which will include school business professionals, finance leads, senior leadership teams, headteachers and governing bodies.

⁷ [Financial sustainability of schools in England - National Audit Office \(NAO\) Report](#)

in “Opportunity for All”.

The remainder of this strategy is structured around our three key aims:

- i. For every school and academy trust to be led by those with the skills, knowledge and capacity to achieve excellent school resource management.
- ii. To support schools and academy trusts to recruit, develop and deploy their staff effectively and efficiently.
- iii. To help schools and academy trusts get the best value and impact from their non-staff resources, so these can be directed in ways that will make a greater positive difference to children and young people’s outcomes.

Supporting professionals to achieve effective SRM

All people involved in the financial management of schools and academy trusts including boards, executive leaders, school leaders, and the wide range of SBPs are necessary to driving success in SRM practice, individually and working together across leadership and governance. As the education landscape continues to change, so will the roles of these people. There will be increasing scope to work collaboratively, to manage resources flexibly and achieve economies of scale. This strategy seeks to support that growth.

We are seeking to support a diverse group, operating in different circumstances from small, maintained primaries to large, cross-phase Multi Academy Trusts (MATs). We know individuals will have very different starting points and we will therefore make available a wide range of support, so that schools, academy trusts and individuals can draw from this to meet their particular needs.

To build a strong system we will target two ambitions:

- A. School leaders, executive leaders, SBPs, and boards develop their skills and knowledge as part of building excellent school business capability.
- B. Schools and academy trusts are supported to build a rewarding, positive and inclusive culture for business professionals.

Actions we will take:

A. We will support school leaders, executive leaders, SBPs, and boards to access opportunities to develop their skills and knowledge as part of building excellent school business capability

We will target investment in training and professional development

We will continue to support schools and academy trusts through our offer of free online

webinars on SRM, covering areas such as strategic planning, financial planning, Integrated Curriculum Financial Planning (ICFP), data visualisation tools (including benchmarking), and procurement. We will continue to roll out this training and aim to deliver the next phase of training from autumn 2022. We will continue to evaluate and publish key headline figures on the perceived impact of the training.

We will extend our current pilot programme of bursaries to a second cohort of aspiring Chief Financial Officers (CFOs) and Chief Operating Officers (COOs), and others interested in pursuing this opportunity, to enable them to access the Chartered Institute of Public Finance and Accountancy (CIPFA) Diploma in School Financial and Operational Leadership⁸. This investment will support new CFOs and COOs with additional support as they step up into these demanding roles. We aim to run the second round of bursaries by early 2023 and will publish findings from the pilot in 2023. We are also funding a pilot CFO mentoring programme (from 2021-22) for new CFOs in academy trusts and will share key learnings with the sector before deciding on next steps.

Current and aspiring SBPs need to know where they can access high quality training, development and qualifications. Recent research⁹ has found that SBPs view professional development opportunities as high priority but we have also heard from some SBPs that they face barriers in consistently accessing such opportunities. We will conduct a review into barriers experienced by SBPs and what can be done to support them.

We will support updated school business leadership professional standards and strengthen guidance on effective SRM practice, better tailoring this to different needs

Clear professional standards and expectations of effective SRM will help individuals know where to focus their professional development. The Institute of School Business Leadership (ISBL) plan to refresh the sector's existing professional standards to ensure they are underpinned by current evidence; and reflect skills and knowledge required to deliver effective SRM that supports each school and each academy trust in realising their own vision, ethos and priorities. We will support ISBL with this through research into good practice and ensure the skills and knowledge in the standards are mapped to the [School Resource Management Self-Assessment Checklist](#) (SRMSAC) for academies, and [Schools Financial Value Standard](#) (SFVS) for maintained schools. This greater clarity on 'what good looks like' will help SBPs to tailor and manage their own professional development and support other school leaders and boards to understand recommended roles, skills and knowledge to achieve effective SRM. We expect to start publishing research by April 2023.

⁸ This innovative training course has been developed for current and aspiring chief finance and operating officers and has been assessed by CIPFA to be broadly equivalent to a level seven (post-graduate) qualification.

⁹ [Hays Education Salary & Recruitment Trends Survey Findings 2022 \(isbl.org.uk\)](#)

In our Green Paper, “[Right Support, right place, right time](#)”, we set out an ambitious vision for a system that offers children and young people with special educational needs and disabilities (SEND) the opportunity to thrive. In support of this vision, we will work to better tailor our resources to meet the needs of special and alternative provision (AP) providers, who have told us they sometimes find it difficult to apply SRM guidance and tools designed for mainstream schools unless they are adapted to the special and AP context. We have recently developed a tailored version of our ICFP tool for these settings, and we will work with the sector to consider how else we can tailor the SRM offer to their needs.

We will strengthen our support for boards, and executive leaders

We developed the National Professional Qualifications (NPQs) for executive and school leaders to offer training on prioritising, allocating and managing resources. We will continue to review and look to improve these to reflect the changing roles of school leaders.

We will invest in training for boards, to support their capability and confidence in financial oversight, including review and scrutiny of financial forecasts. We are already exploring ways to help school and executive leaders with their multi-year planning and internal budget setting practices, taking account of their differing circumstances and requirements. We will develop new guidance for boards alongside this, to support them in their oversight role, including outlining expectations of data they should see. We will publish this guidance in autumn 2022. We will also continue to build on existing SRM resources for boards, including the [top ten planning checks](#), the [top ten estates checks for boards](#), and a downloadable summary within the ‘[View my financial insights](#)’ (VMFI) tool¹⁰.

We will continue to develop and improve our [SRM collection page on GOV.UK](#), building on user feedback, to make it easier for boards and school leaders to access departmental training, guidance, information, and key SRM updates, making it clearer which elements apply to who.

B. Building a rewarding, positive and inclusive culture for professionals

We expect all schools and academy trusts to place school business knowledge at the centre of leadership decision making

We will undertake and publish research to understand how CFOs and COOs in strong academy trusts work at executive and school leadership level with headteachers and their boards to ensure an effective tripartite leadership with the accounting officer and the non-executive team. As part of this we will also explore how these trusts make use of

¹⁰ A downloadable output for boards which contains a snapshot of the key financial performance metrics for their academy trust

their SBPs to support their strategic goals.

We will support connection and peer learning across the school business profession and provide SBPs with access to a community of experts

We will continue to support the 108 live SBP networks identified through our [GOV.UK directory](#), which are open to SBPs in all types of schools. This includes the National Network of Special Schools (NNOSS) which we have supported since its launch in 2020. We will continue to hold a termly National Network Leaders' Forum for all network leads to share best practice and exchange feedback and updates with the department.

Our [School Resource Management Advisers](#) (SRMAs) offer all schools and academy trusts, whatever their financial position, the opportunity to access free, expert support from experienced school business leaders. SRMA visits are tailored to the individual context and setting; the core of most deployments includes practical advice on inclusive use of ICFP, along with other SRM tools and resources, to support leaders' decision-making. SRMAs can help school leaders to identify opportunities to make better use of their funding, enabling them to target resources where they will have the most impact on outcomes for children. We have capacity to support at least 600 SRMA visits each year, up to August 2024, with flexibility to expand.

The SRMA offer is available to any LA, school or academy trust that would welcome additional advice or support. Feedback from previous visits highlights the value of tailored SRMA advice, especially around using ICFP, metrics and benchmarking to deliver school improvement priorities. We want schools and academy trusts to make use of this free expert advice where appropriate. To access this support or to find out more, please contact ESFA.SRMA@education.gov.uk.

We will support schools and academy trusts to induct finance professionals, including school business roles efficiently and effectively

We will engage with unions and associations, including ISBL, the National Governance Association (NGA), the Confederation of School Trusts (CST), the Association of School and College Leaders (ASCL), NAHT the school leadership union and others, with the aim of developing induction materials and career development guidance for SBPs and others involved in financial decision making. As part of this, we will ensure new recruits know where to go for extra support and feel part of a wider community, for example by participating in SBP networks.

We will encourage and support schools and academy trusts to apply principles of wellbeing and flexible working for all staff

We will continue to work with the sector to review evidence and consult with stakeholders on plans for staff mental health and wellbeing support. We will encourage schools and academy trusts to adopt the [Education Staff Wellbeing Charter](#), which is intended to

apply to all types of settings and to all staff.

The next section sets out a range of wellbeing and flexible working support for schools and academy trusts. We will review evidence and consult on plans to address issues that are specific to school business professionals in a tailored way.

Finally, we will look for opportunities to streamline processes

We will bring together a task group, with representation from different types of school settings, to explore opportunities to streamline the demands made on school business functions by the department, including potential rationalisation of guidance. These demands vary from one setting to another, so our approach will reflect this.

We will continue to enhance our data visualisation tools, helping SBPs to prioritise areas of spend for investigation, reducing the time needed to analyse data locally. We will continue to work with financial management system providers to implement the Chart of Accounts (CoA), which standardises academies' financial returns. This includes automation which may help to reduce the burden of submitting financial information, and help to reduce SBPs' workload, freeing up time to focus on other activities.

Effectiveness and efficiency in the school's workforce

Quality of teaching and learning is the single most important in-school factor in improving outcomes for children. Schools and academy trusts spend over £40 billion each year on their workforce. Whilst schools and academy trusts have freedoms in how they recruit and deploy their workforce, everyone in the school system has a duty to ensure this funding and staff time is used wisely and invested in resource and activity that best supports good pupil outcomes.

All schools and academy trusts have their own unique context and leaders make decisions about their workforce that best fit this and their pupils. Investing in all staff, creating a positive and supportive school culture, and having high-quality staff training and continuous professional development (CPD) is fundamental to success. "Opportunity for All", sets out work to support this, including our "golden thread" of teacher development and the [Education Staff Wellbeing Charter](#). Workforce efficiency and effectiveness is about maximising the impact of workforce spend and, when suitable, reducing unnecessary cost.

This section sets out our tools, guidance and programme of work to support schools and academy trusts with their workforce. We will target four ambitions:

- A. Supporting schools and academy trusts and school and executive leaders to develop and deploy their workforce efficiently. We also want to help schools to realise the full potential and impact of teaching assistants, who are a large and critical part of a

school's workforce.

- B. Helping school and executive leaders to build and maintain supportive and positive cultures where this isn't the case already.
- C. Helping schools and academy trusts to use technology to realise efficiencies alongside supporting innovation and spreading evidence-based practice.
- D. Supporting schools and academy trusts to streamline recruitment costs, including of supply teachers.

We will achieve this by

A. Supporting schools and academy trusts to develop and deploy their workforce efficiently and realise the full potential and impact of teaching assistants (TAs)

We will support schools and academy trusts with workforce deployment as we move towards a system where all schools are part of an academy trust

Effective, efficient workforce planning, and deployment is a critical part of leading a school or academy trust. We know that leaders plan and deploy their workforce in different ways, and we have provided tools such as ICFP to support this. ICFP is a management process that helps schools and academy trusts to plan the best curriculum to meet the needs of all of their pupils with the funding they have available, and which can result in a more productive, efficient use of staff time. We want all schools and academy trusts to be using ICFP to measure and plan their curriculum, staffing structure and finances, taking account of pupils needs, to realise these benefits. We will support this through continuing to improve our ICFP guidance, templates, and tools, including an ICFP component on VMFI and tailored resources for SEND schools and AP providers.

We also believe there are a number of principles that academy trusts and school leaders should use to guide their planning and inform decision-making about their workforce, based on the evidence we see from strong¹¹ academy trusts and school leaders. We will refresh our school workforce planning guidance to reflect these principles. This will help to maximise workforce deployment in all schools and highlight the opportunities that come with being part of a strong MAT.

We will support the development of TAs

TAs have a critical role in supporting pupil outcomes and provide a huge breadth of support to pupils in different contexts, from group-work to individual pupils with SEND, to

¹¹ 'Strong Trust' as defined and set out in "[Opportunity for All](#)"

interventions as part of the National Tutoring Programme. We also expect that TAs will play a crucial part in achieving “The Parent Pledge” as set out in “Opportunity for All”. This is the government’s promise that any child that falls behind in English or Maths should receive timely and evidence-based support to enable them to reach their potential.

We are committing to reviewing our policy and support for TAs. This is to ensure their impact and effectiveness is consistent across the system and the different roles they undertake. We will also explore ways of helping all schools and academy trusts to use their resources to recruit outstanding TAs, train them and deploy them where they can have the strongest impact.

B. A positive culture in schools and for the workforce

We will support schools and academy trusts to establish a positive culture and working conditions that can underpin an effective, efficient workforce

In “Opportunity for All” we committed to working together with school leaders to ensure schools and academy trusts have cultures that support wellbeing and tackle excessive teacher workload, where this still exists. To create this culture for all staff, we encourage them to sign up to the recently published [Education Staff Wellbeing Charter](#) and to use the recently updated [School Workload Reduction Toolkit](#), which has been developed with school leaders.

We provide guidance on [GOV.UK](#) to support school leaders to implement a whole school approach to mental health and wellbeing and are providing senior mental health lead training grants to state-funded schools.

We will continue to support flexible working

Flexible working arrangements can help to retain experienced staff, promote wellbeing and improve staff motivation, and are part of effective workforce practice. We have published a suite of resources to support schools and academy trusts to implement flexible working on [GOV.UK](#). We have appointed eight [Flexible Working Ambassador Schools](#) to act as champions, share best practice and provide peer support to other schools locally and we would encourage schools and academy trusts to make use of this support.

C. Workforce efficiencies through digital services

We will improve our digital services to save schools time

The department currently provides a large number of separate digital services, data collections, and interactive forms to the education sector, but these are generally on a “one service per policy” basis. We know school leaders and staff find it difficult to

navigate our services, which creates burdens and reduces the time and financial resources available to school leaders to support and develop their teachers. This also negatively affects teacher, school leader and administrator workload. Over the next three years, we will improve the join up of our digital services, communications and data so schools and academy trusts can engage more effectively with the department. They will receive personalised information, signposting them to practical support and services to facilitate school improvement. This will make it easier to see any changes to guidance and regulations and support administrators with data and information returns.

A new curriculum body will help to reduce planning time and workload for teachers

In “Opportunity for All” we set out our plans to establish an arms-length national curriculum body, building on the success of Oak National Academy’s work in the pandemic. The curriculum body will work with teachers to co-design, create and provide a variety of resources across each curriculum subject from key stage 1 to key stage 4. This will include packages of optional, free, adaptable curriculum resources and video lessons.

D. We will continue to streamline recruitment costs

We will continue to improve Teaching Vacancies, scoping out potential new initiatives to save time and money

We launched [Teaching Vacancies](#) in 2019. It is a free, national service for searching and listing teaching, leadership and education support roles. We have constantly developed and improved Teaching Vacancies since its launch and it is now the largest source of primary school jobs and second largest source of secondary school jobs listed directly by schools and academy trusts in England. We will invite views on the potential to offer other new initiatives through Teaching Vacancies, such as expanding the scope of roles advertised.

We will update and increase the scope of the Supply Teachers deal

In conjunction with Crown Commercial Service (CCS), we launched the Supply Teachers deal in 2018 to save schools money on supply costs. The current Supply Teachers deal is due to expire in August 2022. Crown Commercial Service are currently leading the procurement of a new deal, which will launch in September 2022. We expect that it will have an increased number of suppliers, allowing more schools and academy trusts to benefit from the savings it provides. We are also undertaking work to better understand the drivers of supply recruitment and usage to help inform future departmental policy, further driving efficiencies and savings to reinvest elsewhere.

Supporting schools and academy trusts to get the best value and impact from non-staff spend

Schools and academy trusts spend over £12 billion each year on non-staff goods and services. Through the SRM offer, we are helping schools and academy trusts get the best value out of every pound. This section sets out our practical offer of support to all schools and academy trusts¹² to help with non-staff spend, and tools to support with planning across all their resources. We will target four ambitions:

- A. Reducing cost, and improving value for money in schools and academy trusts' purchasing of goods and services
- B. Supporting schools and academy trusts to manage their estates effectively and efficiently
- C. Getting better value from and maximising the use of digital technology
- D. Improving how schools and academy trusts use data to benchmark and inform decisions

We will achieve this by:

A. Reducing cost, and improving value for money in schools purchasing of goods and services

We will help schools and academy trusts procure goods and services through our new Get Help Buying for Schools Service

We launched two pilot Buying Hubs in the Southwest and Northwest regions in 2017 to help support schools and academy trusts through complex procurement processes. The hubs supported over 2,000 schools and academy trusts and helped them realise savings of £23.1 million¹³. They also provided valuable insights into the needs of our users, and we have used these lessons to shape and develop our new, national Get Help Buying for Schools service.

The [Get Help Buying for Schools](#) service will provide schools and academy trusts with access to specialist support, advice and guidance for their procurements, including complex procurements such as catering and cleaning, and will provide tailored support and guidance to schools and academy trusts nationally, helping them achieve savings through their non-staff spend.

We will offer schools and academy trusts a range of high-quality routes to

¹² Our offers are almost entirely open to all schools and academy trusts. In the small number of cases where this is not the case, we have noted this in the text.

¹³ [School buying: performance of initiatives - GOV.UK \(www.gov.uk\)](#)

purchase goods and services through our department approved frameworks

Our department-approved frameworks cover a wide range of goods and services, from furniture to ICT. We have approved each framework for use by schools and academy trusts based on the quality of service and value it provides. Using our frameworks also ensures that schools and academy trusts are buying goods and services in a legally compliant way.

In recent months, changes to the energy market have brought new pressures to schools and academy trusts. We understand that the energy market is becoming increasingly complex and volatile, and it is hard for schools to be assured they are taking the right decisions. We are carrying out analysis to understand the impact on schools and academy trusts of different sizes, helping us to address concerns appropriately. We are providing support through our frameworks and through the Get Help Buying for Schools service and drafting a new Code of Conduct and guidance which will help schools and academy trusts negotiate deals with comparable, approved suppliers. We are continuing to research and test ways in which we can support schools to manage down their energy usage over the longer term, for example through facilitating school access to and use of smart meters and energy management systems.

We will continue to develop our frameworks to meet the needs of all schools and academy trusts, drawing on data, user feedback and work with our partners to make them accessible and user friendly, whilst also ensuring they support our new [sustainability and climate change strategy](#).

We will enhance the Risk Protection Arrangement, to address new risks

The [Risk Protection Arrangement \(RPA\)](#) is an alternative to commercial insurance, available to all publicly funded schools, which can help schools and academy trusts save time and money. Through RPA, we are committed to helping schools and academy trusts manage the significant risks they face from damage and disruption from fire, flood, crime and cyber-attacks, which can cause disruption to children's learning and financial loss.

We introduced cyber cover for LA maintained schools to the RPA from April 2022 and from September 2022 this will be extended to academy trusts, to help them achieve savings in their cyber cover spend and mitigate the risks and impact of cyberattacks.

In addition, we will work with schools and academy trusts to deliver targeted resilience measures reducing risk and minimising disruption and financial losses. We will help schools and academy trusts to be more sustainable, in line with our sustainability and climate change strategy. We will:

- i. Identify the schools and academy trusts at greatest risk from flood and work with them to install flood resilience measures in partnership with industry and government partners.
- ii. Help school leaders to be better prepared for and reduce the impact of flooding.

- iii. Support schools and academy trusts to monitor and reduce their energy and water usage, to lower costs and be more sustainable.
- iv. Increase resilience to criminal activity, for example through installing CCTV or better securing schools' perimeters.
- v. Help schools and academy trusts with their overall approach to improving risk management.
- vi. Provide advice and guidance on funding to support resilience measures.

We will continue to work across government to help education settings monitor and reduce their energy consumption and carbon emissions. More detail on these initiatives is included in our [sustainability and climate change strategy](#), in particular, Action area 3: Education estate and digital infrastructure.

B. Supporting schools and academy trusts to manage their estates effectively and efficiently

Safe, well-maintained school buildings are vital to support schools and academy trusts to deliver a high-quality education, so that pupils gain the knowledge, skills and qualifications they need. We expect those who oversee or manage the estate to perform this function strategically and maintain their buildings in a safe working condition that supports effective education, including making appropriate use of revenue funding to support ongoing maintenance and repair. The department has allocated over £13 billion capital funding since 2015 for improving the condition of school buildings, including £1.8 billion committed for financial year 2022-23. These allocations have been informed by consistent data on the condition of the school estate.

We have published a range of information to support schools, academy trusts and authorities and bodies responsible for the school estate in carrying out their roles and meeting legal duties. This includes "[Good Estate Management for Schools](#)" (GEMS) and "[Managing asbestos in your school or college](#)", which provide advice, resources and tools. We expect to refresh GEMS and the "Managing asbestos in schools" guidance in 2023 in collaboration with the sector, bringing these in line with the sustainability and climate change strategy.

The Capital Advisers Programme (CAP) will help academy trusts (and the authorities and bodies responsible for their estate) to increase their estate management capability by offering best practice recommendations, tools and improvement support from experienced technical advisers, in line with GEMS. A pilot, completed in 2021, demonstrated potential positive impacts in improving capability and we will publish an evaluation report this summer. The programme will be rolled-out in stages to enable continuous improvement and maximise impact. We are currently considering criteria for selecting academy trusts for the next phase of the programme, to ensure support is provided to academy trusts who need it most.

Our capital programmes have supported major rebuilding and refurbishment of schools.

The [School Rebuilding Programme](#) (SRP), announced in 2020, will transform the educational environment at 500 schools over the next decade. SRP will provide new buildings that are net zero in operation, with increased resilience to the effects of climate change, such as risk of overheating or flooding.

We are committed to supporting the school estate to become more sustainable and resilient to climate change, as outlined in the [sustainability and climate change strategy](#)". Our vision is for the education sector to be a world leader in sustainability and climate change by 2030. We support sustainability through our capital funding and programmes, both to lower carbon emissions and reduce schools' and academy trusts' operating costs. Condition funding can be used to invest in improving energy efficiency across our existing schools, and we provide guidance on sustainability, managing energy and water use and minimising waste. Funding is also available to schools, such as the [Public Sector Low Carbon Skills Fund](#) and [Public Sector Decarbonisation scheme](#).

C. Getting better value from and maximising the use of digital technology

We have launched our new technology standards and will set out more standards to help school leaders use technology effectively and safely in their schools

We will set out the core technology that we expect all schools and academy trusts to have in place by building on our new [digital, data and technology standards](#), so that teachers can be confident they have the right technology in the classroom to support learning. We will continue to work with sector experts to develop standards that support intelligent procurement practices, sustainable, long-term investment in technology, and sector-wide efficiencies. We want all schools and academy trusts to meet these standards but know some will face barriers, so we will engage with the sector to understand schools' needs and establish how best to support them. We plan to release our next set of standards in autumn 2022.

We know that schools often struggle to choose, switch, or implement the best, most secure and cost-effective Management Information Systems (MIS) to meet their needs. This leads to inefficiencies, increased cyber risk, and negative impact on pupil outcomes. We will provide supporting guidance and tools to help schools through that process more easily.

We will improve connectivity across the sector

We will work with commercial providers to accelerate gigabit-capable broadband rollout to schools, to enable all schools and academy trusts to have access to a high-speed connection by 2025.

To ensure that teachers can make the most of the benefits that digital technology can have in the classroom, we will extend our "connect the classroom" programme by

investing up to £150 million, as set out in “Opportunity for All”, to upgrade schools and academy trusts that fall below our Wi-Fi connectivity standards in priority areas. These upgrades will allow schools to save money by moving their telephony and other systems and services online.

We will continue to support the sector to improve their cyber security, build digital resilience and capability through an evidence-led approach

We recognise that cyber security is a concern for many schools and academy trusts, and attacks on schools cost millions of pounds each year and can cause significant disruption. We will continue to develop the support and tools we offer to schools and academy trusts to improve their cyber security and resilience (including RPA cyber cover) and streamline reporting and data capture to improve mutual understanding between the department and schools.

D. Improving how schools and academy trusts use data to benchmark and inform decisions

Our vision is to provide all those responsible for managing school resources with data insights so they can identify areas for improvement alongside the mechanisms for driving those improvements. We will do this by continuing to develop our tools that provide analysis on how schools spend their funding compared with similar schools. This will help schools and academy trusts to identify specific areas to investigate. We will also continue with our commitment to providing publicly accessible benchmarking tools, for the benefit of wider stakeholders and the public.

We will continually improve our Schools Financial Benchmarking (SFB) and VMFI Tools

Our [SFB](#) website is publicly accessible and provides users with access to clear charts and easy-to-use information on schools’ income, expenditure and workforce. The SFB service has averaged over 20,000 visits per month for over two years.

Our [VMFI](#) tool provides more tailored messaging with school-specific insights, for individual schools and trusts. Over 90% of academy trusts have used VMFI since its launch, and 60% of LAs have used it since it was extended to support them and their maintained schools in April 2021. VMFI tailors the information so users can instantly identify areas of their spending that they should investigate further, pulling into one place the advice, guidance and commercial frameworks offered by the department to help schools and academy trusts spend their resources efficiently.

We will continue to develop our data visualisation tools in response to feedback from users, ensuring we make these the most effective products for schools and academy trusts to use.

Conclusion

This strategy has set out an ambitious vision to strengthen and improve resource management capability in schools and academy trusts. We expect every school to play its part which is why, in partnership with the sector, we have developed this guidance and support. We hope this will increasingly lead to sharing and spreading best practice, including tools or approaches developed by the sector and tailored to different school contexts.

We will produce a short technical note later this year, explaining how we plan to monitor progress. We anticipate this will focus on use of the SRM offer, and the contribution that our tools and resources make to help schools unlock a further £1 billion of efficiencies, to be targeted into areas that have the greatest impact on educational outcomes, as well as setting out proposals for how we will monitor other areas within the strategy.

Our ultimate ambition is that, in future years, when all schools are part of an academy trust in an independent, sustainable school system, schools and academy trusts can maximise every opportunity for efficiency and continue to strive for excellence. We need to work in partnership to help pupils gain the maximum benefit from the resources at their schools' disposal. It is only by doing so that we will enable them to achieve their full potential.

Annex: Published SRM facts and figures

This strategy sets out our plans to build on the strong progress that many schools and academy trusts have already made in embedding excellent school resource management, including through the challenges of a global pandemic. The table below sets out some facts and figures that illustrate this progress. We have also published research¹⁴ and case studies providing detailed examples of how particular schools and academy trusts have made use of SRM tools and services to help them achieve their goals¹⁵.

Commercial deals

Since 2017 schools and academy trusts have realised an estimated value of £425 million of savings through our Schools Buying Programme (as of April 2020).¹⁶ In 2020-21 members of the department's Risk Protection Arrangement saved an estimated £101.6 million. Non-members saved a further £45.3 million because of increased competition in the commercial market.¹⁵ The department estimates that the Risk Protection Arrangement saved £420 million for members from September 2014 to March 2021¹⁷.

Teaching Vacancies

The department estimates that schools saved some £5 million in 2020/21 as a result of using the department's free service rather than paying for a commercial advertisement.¹⁶

Data Tools

90% of academy trusts used the department's VMFI tool in 2020/21.¹⁶

School Resource Management Advisers

SRMAs have supported 979 academy trusts and local authority-maintained schools since 2018 (to March 2021).¹⁶ As of the end of March 2021, 313 maintained schools and academy trusts providing a return six months after their SRMA visit told us they had already realised £16.9 million of savings and expected to make savings totalling £83.2 million over three years.¹⁶

¹⁴ Source: <https://www.gov.uk/government/publications/school-resource-management-tools-and-resources-formative-evaluation> and <https://www.gov.uk/government/publications/survey-of-school-business-professionals-2021>

¹⁵ Source: [School resource management: case studies - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/case-studies/school-resource-management-case-studies)

¹⁶ Source: [Schools Commercial: Performance of Initiatives \(publishing.service.gov.uk\)](https://publishing.service.gov.uk/government/publications/schools-commercial-performance-of-initiatives)

¹⁷ Source: [Financial sustainability of schools in England - National Audit Office \(NAO\) Report](https://www.nao.org.uk/publications/2021/financial-sustainability-of-schools-in-england/)

Terminology

Term	Definition
Academy trusts	Includes single academy trusts (SATs) and multi-academy trusts (MATs). Academy trusts are set up as charitable companies limited by guarantee.
Board	The accountable body for the school or group of schools. In: <ul style="list-style-type: none"> • A local authority maintained school, this will be the governing body • An academy trust this will be the board of charity trustees
Executive Leaders	Those held to account for the performance of the organisation by the board. Depending on the structure of an organisation, this may be the: <ul style="list-style-type: none"> • Chief executive officer (CEO) • Executive headteacher, headteacher or principal • Other senior employees/staff • Local governing body (LGB) • A committee of a multi-academy trust (MAT) board, established under the trust's articles of association. • Chief finance officer or chief operating officer of a large multi-academy trust (MAT)
School leaders	By school leaders we are referring to all members of the leadership team in a school that may have a role in managing school resources, including school business professionals, finance leads, senior leadership teams, headteachers and governing boards.
Organisation	The school or group of schools being governed.
School business professional	School Business Professional (SBP) is a term for a range of roles that have responsibility for one, or more than one, school business function, across finance, operations, commercial, human resources, and estate management, including: <ul style="list-style-type: none"> • Office administrators in small schools • Business managers and business directors in larger schools • Chief finance officer or chief operating officer of a large multi-academy trust (MAT)



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