

## Join the ISBL School Resource Management Adviser (SRMA) team

### If you are interested to know more about becoming a SRMA

- Call **Sarah Ray** on 07757702318.
- Look at our website info - [isbl.org.uk/SRMA](https://isbl.org.uk/SRMA)
- Email **Stephanie Gerard** at [srma@isbl.org.uk](mailto:srma@isbl.org.uk)

### 'Becoming an SRMA' blog by Carla Bradshaw, SRMA

In August 2019 I left my post to set up as an independent consultant. One of my first actions was to get back in touch with ISBL to become an SRMA (School Resource Management Adviser). Following a conversation with Sarah Ray, ISBL SRMA Contract Manager, I signed up for **Integrated Curriculum and Financial Planning (ICFP) training** in October 2019, completed the SRMA application form and was booked onto the web based **SRMA Induction** in November of that same year. I found the ICFP training very beneficial. Whilst I knew how to plan resources well, could identify issues and balance a school budget, I had not employed the specific ICFP analysis in my schools. The training was detailed, with calculations explained and gave me lots of resources to look into after the course which most certainly helped me. The trainer was also very kind and supported me with various questions I still had well beyond the realms of the training day. Following the course, I did purchase the ISBL **School Optimisation Tool (I-SOT)** to support future independent work and hopefully SRMA work.

Then in early November I attended the **SRMA Induction** which was an intense 2-hour online session with DfE, ESFA and ISBL representatives. It covered why the DfE has set up this programme, how the ESFA would implement the programme and what it expected SRMAs to deliver and ISBL covered the technicalities of the accreditation process. If I had any doubts, following this induction I knew the process would be rigorous to ensure that those who qualified could deal with the variety of deployments that could come their way.



Keen to progress quickly, I asked for the case study to undertake the '**desk top review**' the following week. I was given 24 hours to complete it which, for me, was a proper test. To complete the assessment document, I had to undertake the ICFP calculations such as Teacher Contact Ratio, Pupil Teacher Ratio, Average Class Size, Cost of one lesson, etc. In addition, I had to analyse the financial information over 3 years and give the percentage spend or per pupil spend on various subcategories of expenditure. I gave a big sigh of relief when I received the confirmation email the next morning that my desk top review had been received.

(Photo - Carla Bradshaw)



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Next was the **Assessment Panel**, I would definitely recommend aiming for that, so the information is still fresh in your mind. Whilst the induction session had clearly laid out the process, I found the interview challenging to say the least. Two very experienced SRMAs supported by Sarah Ray asked questions about every detail of the report I had delivered. Why did I in or exclude certain costs, what would my recommendations be and why. How could I evidence the need for the changes I had proposed in order to raise this effectively with the trustees. Aside from the report, the assessors also asked about me, my experience, what I was up to and what capacity I would have to undertake this role. An awful lot was covered in an hour and when it was finished, I had no idea whether I had passed or not.

However, to my great delight I received a phone call to say I had passed. What a relief! Bizarrely I felt very happy but also daunted at the same time. I always knew it would be a privilege to work with schools, but I had also come to realise the huge responsibility. That may sound odd to have only realised it at this stage, but I guess that it just became clear to me that I could be working with any school across the country.

From then on, I was included in the **SRMA Team at ISBL**. I was delighted, I couldn't have landed in a better place. A highly professional and very supportive community of people. Generous with their time, all working to support schools to use their resources as best as possible and committed to the Business Management profession. The regular team meetings and training sessions are invaluable in keeping up to date and the passing on of tips and best practice.

So, there I was looking for my **first deployment**. In late January I was assigned to a Single Academy Trust. By the time I was through the conflict checking process and I had got in touch with the trust, the deployment date was set for late March. I had received most of the information and had started to draft my list of questions in preparation for the visit...and then Covid-19. The ESFA case Lead was happy for the deployment to continue if the trust was happy to do so. The trust preferred the deployment to progress before the start of the new academic year as a new headteacher would be starting and they were keen to have the report in place to guide their decisions going forward.

A virtual meeting date was set for the end of August 2020. I agreed the figures to be used for the calculations and wrote the draft report informed by the various 'good examples' ISBL had provided. They were of real help in ensuring I captured the right information and used the right tone. I had **a virtual call for about 2 hours with the Chair and the Headteacher** where I discussed the findings. I was able to give the trust some clear recommendations to improve their financial position and some possible actions they could consider in order to address the ratios in the medium to longer term and create financial stability. The trust was happy with the report.

Following this meeting I finalised the report and sent it to ISBL for QA. I was nervous about that and concerned that for my first report I would have to rewrite lots of it. The whole assignment had taken me quite a lot longer than the 5 days allocated for it. To my surprise the QA feedback overall was positive with some recommendations which I included. Thereafter I **submitted the report and savings template** to the ESFA with cc to ISBL. My first assignment complete. Another big sigh of relief!

**How do I feel about it now?** Obviously, the pandemic initially made it difficult to obtain further deployments. However, I am now in the process of working with several other trusts and am writing my reports. It still takes me more than 5 days as I want to ensure I cover all aspects required; however, I think it does get better with practice. I look forward to completing many more deployments as part of the ISBL SRMA team.