

ANNEX A

School Resource Management Adviser Role Specification

1.1 Outline of role

School Resource Management Advisers will be 'school business experts' who will use their expertise to help schools and trusts to drive transformational change within the sector by supporting them to maximise their use of resources in order to deliver positive educational outcomes including through effective integration of curriculum and financial planning. They will support Academy Trusts and LA maintained schools who have come to the department's attention as having poor financial health, either now or in the future, to restore the school's/trust's financial position(s). School Resource Management Advisers will take a holistic view of the school's/trust's financial situation, including consideration of the following issues:

- Human resources:
 - Efficient curriculum delivery
 - Workforce planning
 - Wider use of staff and leadership time
- School management and governance
 - financial management and challenge
 - curriculum & financial planning
- School Resources:
 - Procurement (including, for example, consideration of National Deals, schools' buying strategies etc.)
 - Value for money
 - Capital finance and estate management

School Resource Management Advisers (Accredited Persons) will need to be experienced professionals with extensive up-to-date and practical experience and knowledge of the sector, and a record of success in their profession. People working in an educationally or financially failing institution are unlikely to be suitable to be School Resource Management Advisers.

1.2 Key responsibilities

- Identify issues and provide challenge/scrutiny by:
 - Investigating underlying reasons why the school/trust is facing financial difficulty, avoiding taking a single-issue approach. i.e. taking the broad approach to consider resource and capital funds and pressures, and how the full range of funding streams, such as the Pupil Premium are being utilised.
 - Considering the extent to which the trust/school is taking an integrated approach to its curriculum and financial planning (ICFP).
 - Examining existing structures, plans and practices.
 - Reviewing the efficiency with which the school's/trust's leadership is deployed to support the delivery of pupils' outcomes.

- Based on the issues identified, develop recommended actions for the trust or school to take to support it to achieve long term sustainability, identifying the costed savings of taking these actions. Recommendations should include, as appropriate:
 - Suggesting ways to streamline and improve existing plans and practices, potentially including embedding ICFP, minimising burdens on staff and removing unnecessary workload;
 - Ensuring that recommended measures are proportionate and do not unnecessarily increase staff workload (however noting that some recommendations may require additional input for the staff);
 - Ensuring the time and capacity of school leadership is maximised;
 - Seeking, and/or signposting to, additional expertise and advice in matters outside of their proficiency (e.g. infrastructure); and
 - Signposting existing support
- Support the trust's or school's development of a financial recovery plan. The SRMA's report should incorporate their recommended actions, but the school or trust itself will own, and be responsible for implementing, the financial recovery plan, which will set out how it intends to address its financial situation.

1.3 Qualifications and Experience

- Must have significant experience of school business management and running effective schools
- Must have a high level of skill and experience in business management
- Must have significant financial experience
- Must have a thorough understanding of sector specific operational issues
- May have relevant accounting qualifications
- May have specialist experience of working with Special Schools or Alternative Provision settings
- A more detailed level of expertise in particular areas, such as estate management and capital investment/VfM, procurement or human resources may provide added value. Such skills should be identified when the prospective School Resource Management Advisers are selected. Where advisers do not have detailed experience, they would be expected to note the relevant issues as part of their initial investigations, drawing in expertise where relevant, and use the final report to clearly signpost the need for further expert advice.
- Accredited Persons will have passed through an accreditation process. The accreditation process will provide assurance that the Accredited Persons will be able to use the findings of their review (including analysis and discussions with trust/school leaders) to develop appropriate recommendations, with costed savings, for the trust/school to take to improve their use of resources.