

School Resource Management Advisor (SRMA) Application

Essential skills for SRMAs	Desirable skills for SRMAs
<p>SRMAs must have:</p> <ul style="list-style-type: none"> • Have at least two years' experience of school or trust business management, or financial management in a school setting. • Have a good understanding of how the school system works, including understanding the differences between local authority and academy trust funding and frameworks. • <i>Must be an expert with broad and deep knowledge of the concepts of ICFP</i> and benchmarking and be able to demonstrate how they would use these tools practically in different settings. • Have a good understanding of excellent resource management and know how to obtain best value for school and trust budgets through procurement, recruitment, financial governance, and financial forecasting using DfE tools and other commercial solutions. • Not be currently working in an academy trust or local authority maintained setting that is in deficit or subject to DfE intervention. An exception to this may be granted if the deficit and/or intervention pre-exists the mentor's appointment with the trust or school. • Have excellent interpersonal and communication skills supported by strong emotional intelligence and report writing skills. • 	<ul style="list-style-type: none"> • A minimum of two years' experience as an accountant or similar role. • Experience of managing funding for SEND and Alternative Provision.

Essential skills for SBP Mentors
<ul style="list-style-type: none"> • Have at least 2 years' experience of working as a CFO in an academy trust, or School Business Manager (or equivalent) in a maintained setting and be able to evidence working knowledge of up-to-date sector developments. Mentors should be appropriately role-matched to their mentees as far as possible, e.g. a CFO mentor for a CFO mentee, but not matching a CFO mentee with a mentor who has not also held an equivalent role. • Not be currently working in an academy trust or local authority-maintained setting that is in deficit or subject to DfE intervention. An exception to this may be granted if the deficit and/or intervention pre-exists the mentor's appointment with the trust or school. • Have a strong working knowledge of the concepts of Integrated Curriculum Financial Planning (ICFP) and benchmarking. • Have a good understanding of excellent resource management and know how to obtain best value for school and trust budgets through procurement, recruitment, financial governance, and financial forecasting using DfE tools and other commercial solutions. • Have excellent interpersonal and communication skills supported by strong emotional intelligence.

The accreditation process is managed by a company called [EPI](#) and involves the following:

SRMA

- Attendance at an online induction event (approx. 1.5hrs).
- A one-to-one call with an experienced SRMA.
- Attendance at ICFP Essentials session
- Attendance at ICFP Application session
- Completion of a case study. Candidates will have a 24-hour period in which to complete and return this.
- Attendance at an assessment panel where the candidate will be interviewed, and will present their case study.

SBP

- Attendance at an online induction event (approx. 1.5hrs).
- A one-to-one call with an experienced SRMA.
- Complete a Self-assessment form
- Attend online training session – candidates will be expected to participate in activities and discussions
- Complete a short personal statement reflecting why they want to be a SBP mentor (half a page) Candidates will have a 24-hour period following the training session in which to complete and return this.
- Attendance at accreditation discussion with assessor

As a supplier organisation, North Yorkshire Councils NYES FMS team will support you through this process, provide you with mock case studies and run through the panel process with you so that you are as prepared as possible.

All deployments are matched to SRMAs location and experiences to ensure both SRMA and school/trust receive maximum benefit from the experience. The SRMA is paid at £600 per day plus travel expenses.

If you would like to join our team, please complete the following application form and return to SRMA@northyorks.gov.uk together with a full CV.

School Resource Management Advisor Application Form

North Yorkshire Council is committed to safeguarding and promoting the welfare of children and we expect all SRMA's to share this commitment. This post is exempt from the Rehabilitation of Offenders Act 1974; safer recruitment checks will be carried out, including relevant checks with statutory bodies.

Personal Information	
Name:	
Email Address: (This will be the main way of contacting and working with you so you will need to be able to access / open documents e.g Word / Excel / PDF / Zip.)	
Telephone Number: (This can be school / home / mobile whichever is best for contacting you)	
Home Address:	
Name and address of your employer/ consultancy company/ self employed:.* (SRMAs can be self-employed consultants or be employed by a company / school or trust.)	
Please confirm you hold a clear Enhanced DBS clearance to work in schools? (You will be required to <i>provide a copy</i> .)	
Please let us know if you have an additional needs or disability requirements?	
<p>*For self-employed consultants - once accredited, we will carry out an IR35 assessment to determine whether off-payroll working rules apply. If these rules do apply then income tax and employee/employer NI contributions will be deducted from fees. Further information can be found here: Understanding off-payroll working (IR35) - GOV.UK (www.gov.uk)</p> <p>For those based in a school, trust or local authority – once accredited, payments will be made directly to the organisation.</p>	

I would like to apply for: (please circle)		
SRMA	SBP Mentor	Both

Background and Experience			
<p>Please provide a brief outline of your school business leadership experience to date.</p> <p>Please include any specialist knowledge to demonstrate that you meet the essential skills criteria.</p>			
<p>Please give an example of your understanding of the financial management cycle in LA Maintained and Academy school settings.</p>			
<p>Please give details of any experiences you have giving you a wider understanding of the sector. e.g speaking / journals / sustainability.</p>			
<p>Please detail any Qualifications you may have. (Attach CV)</p>			
<p>Please give details of your experience working as part of a governing body. - in your own organisation / as a governor / as a trustee.</p>			
<p>Please explain how you manage working relationships in school / with governors/Trustees and other stakeholders e.g. MAT Central Services or LA.</p>			
<p>Please circle all areas you have strong experience in: (This helps us to match you to deployments)</p>	Nursery	Primary	Secondary
	Post 16	Pupil Referral Units	Special Schools
	Free Schools	UTCs	Maintained schools
	Single Academy Trusts	Multi Academy Trust	Independent Schools
	<p>Faith Schools:</p> <ul style="list-style-type: none"> - Catholic - Church of England - Jewish - Sikh - Other please detail 		
	<p>School Finance</p> <ul style="list-style-type: none"> - ICFP 		

Please provide a brief outline of your experience of: (This helps us to match you to deployments)	<ul style="list-style-type: none"> - Audit - Accountancy - Book Keeping 		
	HR <ul style="list-style-type: none"> - Recruitment - Staff deployment & timetabling - Staff management - Workforce development 		
	MAT central services structures and strategy		
	Payroll		
	Pensions		
	Estates & Asset Management <ul style="list-style-type: none"> - Strategy - Funding – Capital / LAMPA/ SCA / CIF - Health & Safety 		
	Risk Management		
	Governance		
	Systems		
	CFO in SAT		
	CFO in MAT		
	Please circle all areas you are willing to carry out deployments: (This help us to match you to deployments)	East of England and North East London	East Midlands and the Humber
Lancashire and West Yorkshire		North of England	
North West London and South Central London		South East England and South London	
South West Midlands		West Midlands	
<p>To carry out the role of an SRMA it is essential that you have a strong working knowledge of ICFP and are able to demonstrate this through a practical case study and panel discussion.</p> <p>If you are not able to answer yes to the questions below, please undertake additional training to practise your working knowledge of ICFP and benchmarking before applying to become an SRMA.</p> <p>Integrated curriculum and financial planning (ICFP) - GOV.UK (www.gov.uk)</p>			
Do you use ICFP in your current setting?	Yes		
	No		
Do you use benchmarking in your current setting?	Yes		
	No		
Are you able to calculate the 12 key ICFP metrics in your current setting?	Yes		
	No		
Can you support other settings using ICFP?	Yes		
	No		

Please detail your experience of ICFP and how you have applied it.	

Please note: the information you supply in this form will solely be used by NYES for identifying candidates who meet the requirements of the role of SRMA, inviting successful candidates to undertake the accreditation process, and in the event of successful accreditation, to hold securely in our framework for recording skills and experience of SRMAs to help inform assignment to specific deployment needs. We may be required to share your data with the DfE and ESFA as part of our SRMA contracting arrangements.

Once you are successfully accredited as an SRMA you will be required to provide the following information for our records.

Additional information required following successful accreditation
Sight of your clear Enhanced DBS clearance to work in schools?
Evidence of your right to work in the UK.
IR35 if appropriate *For self-employed consultants - we will carry out an IR35 assessment to determine whether off-payroll working rules apply. If these rules do apply then income tax and employee/employer NI contributions will be deducted from fees. Further information can be found here: Understanding off-payroll working (IR35) - GOV.UK (www.gov.uk) .
Confirmation you are not subject to a prohibition order made under section 141B of the Education Act 2002 to carry out teaching work (as defined in regulation 3 of the Teachers' Disciplinary (England) Regulations 2012). <i>I am happy for NYCC to verify this against the lists.</i>
Confirmation you have not been declared bankrupt or are prohibited from serving as a company director. <i>I am happy for NYCC to verify this against the lists.</i>
Confirmation your school or company has current adequate insurances in place. <i>provide copy certificates.</i>
Confirmation you are able to comply with GDPR and Data Protection laws when storing information on deployments. Please confirm any cloud storage used is in the UK.
Confirmation that any FOI requests will be passed to NYCC within 2 days and in line with your contract you will not respond directly to any request.
Details of any particular schools, trusts or local authorities, which you would not be able to undertake deployment with due to conflicts of interest? A conflict of interest will exist where the SRMA has worked for the school/trust in the past or has a close personal or professional relationship with anyone working for the school or trust.

I confirm I have also attached my CV: Yes / No

Name	
Signature	
Date of Application	