

School Resource Management Advisor (SRMA) Application

BACKGROUND ON SRMAS

The role of an SRMA is to support Academy Trusts and Local Authority Maintained Schools to identify and further develop best practise or offer support to improve their financial health.

SRMAs take a holistic view of the school's/trust's financial situation, including consideration of the following issues:

- Human resources: Effective curriculum delivery, workforce planning and wider use of staff and leadership time through the use of Integrated Curriculum and Financial Planning (ICFP).
- School management and governance: financial management and challenge across the senior leadership team and board of governors.
- Resources: Procurement (including, for example, consideration of National Deals, schools' buying strategies etc.), value for money, capital finance and estate management.
- Asset Management: Good Estates Management and strategic vision for the schools' assets.

SRMAs support effective resource management by providing independent and impartial advice to schools and trusts on how to maximise resources in order to maintain and improve educational outcomes for all pupils, including those with SEND. SRMAs should take into account the nature and context of the school, i.e. whether it is academy or maintained, MAT or SAT, mainstream, special or Alternative Provision, primary or secondary, and whether it is a faith school.

SRMAs can offer support in a number of ways and are deployed in differing capacities depending upon the individual needs of the school/trust. These include:

- Where the school or trust is in good financial health, the SRMA shall be required to make recommendations on how the school or trust can further improve its approach to financial management to ensure every possible resource is being directed to the areas that have greatest impact on educational outcomes; part of this will be determined by the school or trust's approach to ICFP.
- Where a school is experiencing difficulties the SRMA can support a school or trust to develop a viable budget plan by examining its financial planning and proposed spending plans. As part of this, the SRMA will be expected to consider whether the trust or school uses an ICFP approach and, if so, how this is carried out. This includes identifying whether it uses ICFP diagnostic tools and models and how.
- Where the trust or school does take an ICFP approach, the SRMA shall work through the key metrics to identify options that could potentially deliver improvements in the way staff are deployed.
- Where the trust or school does not use ICFP, the SRMA shall help it introduce ICFP into its planning processes as well as suggesting other options for improvements.
- Where a school or trust has a new CFO the SRMA can be deployed as a mentor to support the growth and development of the new CFO.
- In most instances, SRMAs will be expected to carry out a 'follow-up' deployment to the same setting at least six months after report submission. The purpose of this deployment will be to check on progress against the recommendations.

All SRMAs **must carry out a minimum of two deployments per year** (from the date of their accreditation) to maintain their accredited status. Full details are available on our website www.northyorks.gov.uk

North Yorkshire County 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.

ACCREDITATION PROCESS

| Essential skills for SRMAs | Desirable skills for SRMAs |
|--|--|
| SRMAs must have: <ul style="list-style-type: none">• at least two years' experience of:<ul style="list-style-type: none">- School business management, or- Financial management in a school setting;• a good understanding of how the school system works• be experts in the concepts of ICFP and benchmarking.• have a good understanding of excellent resource management and know how best value from budgets can be obtained through procurement, recruitment, financial governance and financial forecasting. | A minimum of two years' experience as an accountant or similar role. |

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

- Attendance at an online induction event (approx. 1.5hrs).
- A one to one call with an experienced SRMA.
- 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.

As a supplier organisation, North Yorkshire Councils NYES FMS team will support you through this process and will hold supplementary training sessions, provide you with mock case studies and run through the panel process with you so that you are as prepared as possible. A payment of £400 is available for attendance at the accreditation day but only upon successful completion.

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 £400 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

| Personal Information | |
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| Name: | |
| Email Address: <small>(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.)</small> | |
| Telephone Number: <small>(This can be school / home / mobile whichever is best for contacting you)</small> | |
| Home Address: | |
| Name and address of your employer/ consultancy company/ self employed:* | |
| <small>(SRMAs can be self-employed consultants or be employed by a company / school or trust.)</small> | |
| Please confirm you hold a clear Enhanced DBS clearance to work in schools? <small>(You will be required to <i>provide a copy.</i>)</small> | |
| 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> | |

| Background and Experience | |
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| <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> | |
| Please give an example of your understanding of the | |

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| financial management cycle in LA Maintained and Academy school settings. | | | |
| Please give details of any experiences you have giving you a wider understanding of the sector. e.g speaking / journals / sustainability. | | | |
| Please detail any Qualifications you may have. <i>(Attach CV)</i> | | | |
| Please give details of your experience working as part of a governing body. - in your own organisation / as a governor / as a trustee. | | | |
| Please explain how you manage working relationships in school / with governors/Trustees and other stakeholders e.g. MAT Central Services or LA. | | | |
| Please circle all areas you have strong experience in: <i>(This helps us to match you to deployments)</i> | Nursery | Primary | Secondary |
| | Post 16 | Pupil Referral Units | Special Schools |
| | Free Schools | UTCs | Maintained schools |
| | Single Academy Trusts | Multi Academy Trust | Independent Schools |
| | Faith Schools: - Catholic - Church of England - Jewish - Sikh - Other please detail | | |
| | | | |
| Please provide a brief outline of your experience of: <i>(This helps us to match you to deployments)</i> | School Finance - ICFP - Audit - Accountancy - Book Keeping | | |
| | HR - Recruitment - Staff deployment & timetabling - Staff management - Workforce development | | |
| | MAT central services structures and strategy | | |
| | Payroll | | |
| | Pensions | | |
| | Estates & Asset Management | | |
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| | <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 | |
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| | 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. |

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| Name | |
| Signature | |
| Date of Application | |