

#KyraJournal



TEACHING
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ALLIANCE



Togetherness through Tighter Times

July 2017

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A Warm Welcome to this edition of the **Kyra Journal**

As we all prepare for a much deserved summer break, we can reflect on a year when the issue of school funding has loomed large for so many of us. Even with the recent and very welcome announcement of additional funding as part of the new National Funding Formula (meaning that per pupil spend will now be maintained in real terms) we must still work hard to ensure that our money goes further. The message has to be 'let's prepare – together – as best we can'.

Spending money efficiently and effectively so that it has the maximum impact on pupils' learning requires us to think differently and to work together. We need to look at how we procure services, maximise the talents of our staff, and consider our capacity for seeking additional funding and income generation so that we can make the most of every penny.

This edition of the journal shares some useful hints and tips. We've included a case study on how Mount Street, Benjamin Adlard and Lincoln Carlton are sharing staff and expertise to reduce external spend and make the most of talent. We've also included a focus on Marcus Adams who sets out how school business managers in the county are collaborating - saving money and gaining better value from suppliers as a result. Sarah Ginns has also provided some hints and tips on effective bid writing – something schools are doing much more of in the current climate.

The key message is that by working together we can mitigate some of the challenges. The next few years are still not going to be easy, but we must – where possible - begin to plan and to develop new ways of working that ensures our schools and pupils can continue to thrive.

I hope you enjoy reading this edition of the journal. Have a lovely summer break!

Helen Barker





Pooling our talent: partnership for more efficient and effective site management

We often hear of how collaboration is so important to school improvement, yet, it seems, we are still scratching the surface of what can be achieved in other areas that ultimately impact on pupils' experience of school. For Mount Street Academy, Benjamin Adlard Primary School, and Lincoln Carlton Academy the benefits are becoming evident in other ways – not least in terms of the improvements to the learning environment and the ability to spend money much more efficiently in the process. Here, Michael Pain speaks to Carla Wray, Andrew Stokes and Paul Quincey about what has been achieved through better co-ordination and partnership across the three schools.

When Benjamin Adlard joined Mount Street and Lincoln Carlton in 2014, the onus – quite rightly – was on school improvement. The story of how teachers, leaders and support staff have raised standards, with support from colleagues across the Kyra alliance, has been well documented. Yet in the background other developments were afoot. The schools' executive leadership team were keen to take a new approach that ensured that premises and site managers were working together, drawing on their collective skills and maximising the use of resources and expertise across the three schools. There was a strong belief that collaboration should be making a difference to the schools on a whole number of levels.

“We wanted to develop a shared sense of ownership and involvement across our premises management team” says Carla Wray, Business Manager across the three schools. “That meant ensuring they had more responsibility within their individual schools and also that they were involved wherever required in supporting other schools across the group.” The starting point was to change the hours and job descriptions of premises / site managers, so that – unlike traditional caretaker roles – they were at school throughout the day, responding to the needs of staff and children as and when required.



“We made some key changes” says Carla “because we wanted our premises team to be able to serve the schools and the staff as and when they needed it. Issues crop up during the day and it can impact on learning. We also wanted to take the opportunity to create more flexibility, so that premises staff could take holidays during term time because they were covered across the three schools, but also because it would free them up to do essential works and improvements during the holidays. Ultimately it was about making best use of the skills and talents of our premises team and reducing our reliance on outside contractors.”

“Ultimately it was about making best use of our premises team and reducing our reliance on outside contractors.”

The second development was to look at the skills and backgrounds of site managers across the three schools, so that each was aware of how they could draw upon one another when necessary. “Paul and Mick Burns, site manager at Lincoln Carlton) have a lot of experience gained from their time in the building and maintenance sector” says Carla, “so when we looked to reappoint to the site manager role at Mount Street last year we were very attracted to Andrew’s background in project management and grounds maintenance. It complemented the skills we had and the benefits have been evident over the past year.”

Indeed, Andrew’s appointment in September 2016 signalled the real shift towards the new approach. The schools have stopped using external contractors in areas such as grounds maintenance and have been in a much better position to deploy the team where appropriate to their skill sets. “Now, if we have a particular project or problem across the schools” says Paul, “we have been able to pool our resources by bringing the various roles together and operating more as a team. It can be challenging because it does require some co-ordination, but we are seeing the benefits both in terms of how responsive we are to the schools’ needs and in reducing costs.”

A key example of this was when Mount Street suffered a major boiler breakdown earlier this year (during the winter months!). The team were able to draw on the skills of Mick (site manager at Lincoln Carlton), who has significant experience of programming and maintaining boilers. Mick was able to perform a diagnostic and to identify the particular issue. The team were then able to brief their contractors quite specifically on the fault and the area requiring repair – ensuring they were able to limit the costs. The team consider this saving to have been in the region of £3000.

“By providing the planning, the labour and going direct to suppliers (and negotiating with them) we have been able to create a bespoke outdoor area, which has been produced at a fraction of the cost of an ‘off the shelf’ product.”



The benefits have not been limited to reactive issues. The team have also been much better placed to undertake projects that, again, would otherwise have been undertaken by external contractors. “Because we have the range of skills, the strong links with teachers, and the ability to work during the holidays, we were able to take on a major project to create an inspiring outdoor area for the children at Mount Street” says Andrew. “The teachers know we are not just here to open up and keep things ticking over, and when the opportunity came up to create the new outdoor space they were able to work with us to shape the ideas from the outset. From the beginning we were able to draw on my skills in project management and sourcing materials, on Paul’s and Mick’s craftsmanship and handy skills, and on the input of teachers and support staff – who have been able to input at all stages. By providing the planning, the labour and going direct to suppliers (and negotiating with them) we have been able to create a bespoke outdoor area, which has been produced at a fraction of the cost of an ‘off the shelf’ product. It’s a real testament to what can be achieved by working together across schools and making the most of our collective resources and skills.”

The outdoor area was launched at the end of June and has transformed the Mount Street site. It features sensory paths, weather proof astroturf flooring, reading corners, climbing frames and a wildlife corner. The area has proven to be a big hit with the children – revamping a large area of the playground which was, until February, covered by mobile classrooms. Alongside developing the area, the team have also been able to provide in house risk assessments and training for teachers so that they have been able to make best use of the area – as well as ongoing maintenance and support going forward.

“Because the team were able to work together, a relatively simple job didn’t become an unnecessarily expensive one.”



Carla is very clear that the new approach is bearing fruit and leading to savings on a day to day basis: “We are not using any additional time. The team would be here anyway, working within the individual schools, so there is no extra resource. Instead we are using that resource far more intelligently and it can make a difference in the smallest ways. For example, the lights in the hall at Benjamin Adlard needed cleaning and in some cases replacing. That should be a simple job but because we needed scaffolding it would have required two suitably qualified people on site and would therefore in other circumstances have required an external contractor’s support. Because the team were able to work together, a relatively simple job didn’t become an unnecessarily expensive one – yet these cases do often rely on our ability to work as a team.”

There is clearly huge potential in the approach. Kyra’s SBM group is already giving some thought as to how the alliance can create a skills directory, whereby schools can access support from one another where required. “We’re only scratching the surface of what can be achieved” says Carla, “but with budgets as tight as they are, I think it will spur us on to really think out of the box about what more we can achieved through collaboration at all levels.”

The discussions will be picked up at the next meeting of the Kyra SBM and Administrators’ forum next term.

See our interview with Andrew and Paul on the Kyra TSA youtube channel: <https://www.youtube.com/watch?v=SdF6pnEPYi8>



Kyra School Business Professional Development Day



Tuesday 20 June 2017 saw the inaugural Kyra School Business Development Day, held at Bishop Grossteste University and attended by 32 school business colleagues from both Kyra schools and other schools across Lincolnshire.

Colleagues began arriving early for the event and there was soon a fantastic buzz in the air as we all looked forward to an inspirational day with a range of speakers who shared their perspectives on the current school landscape and its implications for school business leadership and management.

Helen Barker, Head of the Kyra Teaching School Alliance, welcomed colleagues to the event with a very moving presentation which addressed the scale and pace of change within our schools and reflected on whether all this change is actually making the children in our schools any happier and/or leading to better outcomes for them. She praised the vital role school business colleagues have in the running of their schools and in enabling the delivery of a curriculum that will inspire every child to realise their dreams.

The event had come about due to the ambition, enthusiasm and persistence of the Kyra SBM Administrator Forum, who had first met a year ago to the day with just a handful of members; and Helen thanked Carla Wray (Chair of the Forum) and Sue Gorden (Vice-Chair) for their ongoing commitment to the Forum and without whom the development day would not have come to fruition.

Helen shared an emotional video clip with colleagues from the 1992 Barcelona Olympics, where Derek Redmond pulled up injured and his father burst out of the crowd to help him across the finishing line. Challenging times are so much easier when we have others to lean on for support. In today's climate of not enough time or money, greater responsibilities and more demands, it is even more vital that no school or professional should be operating in isolation. Our partnerships and relationships must sustain us, support growth and innovation and be grounded in moral purpose and joint professional development. Everything we do in our schools must be focused on giving every child the best possible start in life – irrespective of background or circumstance. Children have just one chance, and we want to give them the best chance possible.

Helen described the characteristics of strong and deep partnerships, which are sustained and long-term, and grounded in strong leadership, governance and accountability. The Kyra SBMA Forum is proving itself to be such a partnership, moving forward with clear goals and aspirations and overcoming challenges with compassion and actions. Helen told colleagues that she hoped they would come away from the event feeling inspired, supported and truly part of a collaborative and professional learning network.



Val Andrew

Next to speak was Val Andrew from the Association of School and College Leaders (ASCL), whose interesting and informative presentation brought colleagues fully up to date with a range of key policy issues.

Val noted that the snap general election meant that implementation of the National Funding Formula (NFF) was likely to be delayed by at least a year (however, there are now clear indications that it will be introduced in April 2018). ASCL has been campaigning for a more equitable funding formula for schools for 20 years so is supportive of the NFF in principle but hopes to work with the DfE to refine it.

Val emphasised that there are two key issues regarding school funding – distribution AND sufficiency. Whilst the NFF (if done properly) would address the current distribution problems, the core concern is that is simply not enough money in the education pot to sustain the school system. ASCL is therefore lobbying hard for both issues to be addressed by the new government as a matter of urgency.

Val urged colleagues to develop three versions of their school budget – the best case scenario, the worst case; and the most likely version given current knowledge. In doing so, Val suggested that colleagues should work on the basis that the NFF will go ahead but also develop a scenario that considers what might happen to their budget if the NFF doesn't go ahead.

In terms of the expansion of MATs, school business colleagues are likely to have a core role in due diligence activities, the centralisation of business functions, the coordination of MAT governance functions and associated training; and in developing marketing and recruitment policy and activity across the MAT. Val suggested that whilst the Certificate of School Business Management (CSBM) and Diploma of School Business Management (DSBM) qualifications are still relevant within the sector, as their roles develop, colleagues might wish to consider whether other professional qualifications might be more relevant to their roles, such as those relating to HR or finance.

Jeff Marshall

Colleagues then had an informative and challenging discussion from Jeff Marshall, who has been a school governor for 24 years and a chair of governors for 20 years at one of the first primary schools to convert to academy status. Jeff's school is in Trafford and regularly attracts several times more applications for entry to reception than there are spaces – this year there were 276 applications for just 30 places. Jeff described the school's journey to academy conversion, which had also enabled the school to provide the wraparound care that parents needed while raising valuable additional income for the school. The school is able to provide bonuses for all of its staff, which are unrelated to academic achievements, as well as a range of other benefits. Staff have also been responsible for developing their own inspiring curriculum.

Jeff highlighted that it remains the government's intention for all schools to become academies, and although they will no longer be forced to do so, schools will increasingly find themselves with little choice as the number of academies in local authorities reaches a tipping point (making the maintained school system unsustainable).

Jeff suggested that maintained schools have the option to do nothing and see what happens, but that they should really be thinking about either joining an existing MAT or creating a MAT themselves, in which case they should undertake appropriate due diligence and reviews of teaching and learning, leadership and management, governance, finances and condition surveys. For standalone academies, they also have the option of doing nothing and seeing what happens, or again joining a wider MAT or creating one themselves, whilst ensuring robust due diligence.

Kaele Pilcher

Colleagues then heard from Kaele Pilcher, who is a pension fund representative from the local government pension scheme. Kaele explained that the LGPS is a nationwide pension scheme, and membership is automatic if a colleague is employed by an academy or LA maintained school. Kaele explained the key features of the scheme, covering issues such as retirement age, contribution rates, options for colleagues in financial difficulty, and options for paying extra into the scheme. Kaele also explained to colleagues how to interpret the pension benefits statement, so that they can support colleagues in school.

Debbie Barks

The development day was concluded with an active and inspirational workshop on collaboration, run by Debbie Barks, Head at St Faith's Infant School. Debbie emphasised what can be achieved by everyone working together towards the same aim, and therefore that collaboration, not isolation, is vital, particularly in challenging times.

Collaboration at St Faith's includes membership of several different collaborative groups: including Kyra; and the Mobilise project (which this year has focused on the deployment of teaching assistants). Debbie asked school business colleagues to get involved with this year's Mobilise 2 projects and to add their expertise.

Colleagues discussed the challenges they were facing in school at the moment, which included: 30 hours nursery provision, staffing, and succession planning; and were asked to think about some possible solutions to share with colleagues in the room.

Debbie concluded her session by re-emphasising the importance of collaboration and in supporting each other through both the good times and the challenging times so that everyone can benefit.

Colleagues all agreed that it had been an excellent day, with inspirational and informative speakers, great opportunities for networking and discussion, and providing a feeling of support and collaboration going forward for school business colleagues.

Feedback from the day was really positive, with 84% rating the day as 'excellent' and 16% as 'good'. In addition, all colleagues found the inputs relevant to their own training and development needs.

"It was great to network and catch up with colleagues in the same position, all feeling the same and battling similar issues."

"An excellent day, thank you. A good range of speakers and it was helpful to share good practice."

"Extremely useful day...I have come away with lots of information and ideas. It was also a great opportunity to network."

Leader in Focus: Marcus Adams



When Marcus Adams left his management job in the retail sector twenty years ago to become a part-time administrator at Bucknall Primary School, little did he know the journey his new path would take him on. "I had taken a conscious decision to step away from a pretty cut throat and competitive industry" says Marcus "to instead use my skills to support a small-rural primary school for around six hours a week. I had a small-holding and it was a fairly sedate lifestyle for a little while!" That was all about to change.

Marcus' arrival in the sector coincided with some key developments in how schools were being run. "It became clear early on that schools – including our own – were taking on more and more responsibility for the 'back office' work. In the first few years it became clear that we were expected to do more in terms of HR, site management, and managing the finances. There was also more in the way of regulation and legislation – such as fire risk assessment and legionella. Things began to snowball and most of the sector was not prepared."

Other local schools began to hear of Marcus' role at Bucknall and the fact that his experience had proved to be hugely beneficial for the school and its teachers in managing the increasing workload and responsibilities. "They knew that I was doing limited hours, and I soon received offers to provide support – either on a one-off basis or on a more permanent basis – to other local schools as well." By 2004, Marcus was working across three schools, Bucknall, New York Primary and now also Baumber Primary which had federated with Bucknall. This increased his commitment to three days in total, which soon became four when he also agreed to provide one day's support to Middle Rasen Primary.

"At this point in time" says Marcus, "the role of School Business Manager did not exist. There was no recognition of the role – although some schools did have a bursar. Yet, there were growing numbers of us who were doing the SBM role! It was professional work, and in some of the schools I was advising the head and supporting on issues such as budget planning, staff restructuring, and ensuring that we were meeting statutory responsibilities. There were many other colleagues emerging who were doing the same thing – so we took the opportunity to form the cluster group."



“The cluster group has been absolutely essential for us to get grips with and to share ideas on the increasing responsibilities and legislation that we have to face.”

The cluster group – at that time was known as the ‘administrators’ cluster group’ – was formed to provide a forum of mutual support for administrators working in a number of Lincolnshire schools. “It’s been absolutely essential for us to get to grips with and to share ideas on the increasing responsibilities and legislation that we have to face. Over time the group has become even more essential as the job has become more challenging.”

One key area in which the group provided impetus in the early days was in terms of encouraging and giving administrators the confidence to undertake professional qualifications for business management. “One member of the group took the plunge and enrolled on the Certificate in School Business Management with the National College” says Marcus, “and she was very willing to share the process with us, what the course involved, and the kind of tasks and assessments she was undertaking. Through that we all gained the confidence to do the programme, not least because we were able to support one another through it. Gradually, more and more of the group were recognised professionally as SBMs, and a number have undertaken the Diploma in School Business Management.”

Marcus continued to work across a number of schools. What became evident is that partnership working was achieving efficiencies and better value for money at a number of levels. “From the perspective of the schools I have worked across, each was able to afford someone of business manager level-expertise (despite their size and small budgets) because they were each able to access me for a limited number of hours per week. It’s a model that has worked well until now, and we’ve been able to access good deals with suppliers across the schools because of the purchasing power a shared SBM can use. So the SBM job – at least until recently – has been sustainable for the schools involved where it may not have necessarily been so, and they’ve been able to achieve some economies of scale in the bargain.”

“As a group we have been able to engage with suppliers in a far better way. We contact suppliers and we ask them to visit our group meetings to present on their offer, what they do to provide best value, and to discuss options in terms of price.”

However, Marcus and his colleagues are also demonstrating how economies of scale have been achieved at an even greater level through locality wide partnerships. “As a group we have been able to engage with suppliers in a far better way. We contact suppliers and we ask them to visit our group meetings to present on their offer, what they do to provide best value, and to discuss options in terms of price. This gives us an opportunity to ask the right questions of the suppliers as a group and also to negotiate as a group – because we are bringing the power of joint purchasing to the table. In recent months we’ve engaged with suppliers on introducing new phone systems and health and safety support services – all in response to the needs of schools and members of the group. I believe we’ve made some very informed purchasing decisions and achieved some good savings.”

Looking to the future, Marcus is very frank about the challenges and the need for schools to shift their mindsets. "For many schools these are very challenging times. We can't afford to be making purchasing decisions alone where we can achieve better savings by working together. So, as schools and as business managers we need to be thinking hard about how well we are collaborating and whether we are being open enough about our contracts, our purchasing needs, our budgets, and how – bearing all of that in mind - we can achieve more strategic procurement . The days of working in isolation are over, we simply can't do the job well without collaboration."

Marcus has welcomed the advice and some of the new procurement frameworks provided by central government, however, he is also clear that strategic local procurement between local schools is an option every school should regularly consider: "The national frameworks are a good step and it's important schools are aware of them and make the most of them. However, there is a lot to be said of schools engaging – collectively – with local suppliers who can provide a very responsive service and who are also contributing to the local economy and our communities. Our schools have very different needs, so the one size fits all approach only goes so far, and we expect all our suppliers to recognise the diversity of our schools and to commit to high levels of ongoing customer service."

"It's an uncertain time, however, we have to plan as far as possible because if we don't the challenges are only likely to get harder."

There is no doubt that the sector is facing a challenging time. For Marcus, he feels that for those schools that face falling rolls and tighter budgets, there is a particular need to think strategically about sharing staff and resources. However, for all schools, it is important that they plan – as much as possible – for the next three to five years, taking into account changes to the curriculum, changes in pupil numbers, anticipated capital spend and more.

"Those discussions must be a regular feature of the head and business managers' meetings. It's an uncertain time, however, we have to plan as far as possible because if we don't the challenges are only likely to get harder. For business managers that means working together and sharing ideas and intelligence so that we can continue to support our schools to manage the challenges ahead."

See our interview with Marcus Adams on the Kyra TSA youtube channel: <https://www.youtube.com/watch?v=oli8McawCgk>





Expert Voice: Effective Bid Writing for Schools

Sarah Ginns - Research Manager, Forum Education

In an environment where public funds are getting ever tighter and school budgets are being stretched as never before, it is perhaps unsurprising that an increasing proportion of my work over the past year or so has been focused on supporting schools and groups of schools in bidding for additional funding. When it comes to bid writing, there are some general principles that should guide your decisions, whether your application is to a national body or a small local charity. I've tried to capture a few hints and tips based on my experience.

The advice I would give to any school or group of schools when bidding for any amount of money from any source would have to start with "does this funding fit with our school improvement plan, our vision, ethos and the moral purpose with which we run our school or group of schools?" My apologies if this seems obvious but in the funding environment we find ourselves in, there is risk that schools and groups scramble for any potentially viable pots of money without properly thinking through how it will support their aims. In the words of Steve Munby, "when the watering hole gets smaller, the animals start to look at each other differently"!

In making your decision over whether to submit a bid for funding, please look carefully at the criteria before you start the process, to avoid wasting valuable resources on something you are unlikely to be successful in securing. On the subject of resources, think about whether you have the capacity and expertise, not only to make the bid in the first place, but to enable you to deliver the plans you have for the funding should you be successful. We often find that, particularly for larger pots of money from the DfE for example, joint bids from school groups or clusters are more successful, because they are able to demonstrate a wider expertise and greater capacity for delivering their aims. Think about whether this might be an appropriate approach for you and indeed whether it could help to further strengthen some of the existing collaboration between local schools.

We often find that, particularly for larger pots of money from the DfE for example, joint bids from school groups or clusters are more successful, because they are able to demonstrate a wider expertise and greater capacity for delivering their aims.

The next, but probably the most crucial, element of the bidding process is to look at your evidence. This is two-fold – you must be able to show, through strong data and knowledge of your pupils, a deep understanding of the needs of the different cohorts of pupils in your school, in particular in the context of the community you are working within, so that you can show the need for the funding and how you propose to use it to support pupil outcomes. Secondly, you must also have in place robust KPIs (key performance indicators), through which you can demonstrate that you will be able to show the impact that the funding and consequent interventions have had on pupil outcomes. Whilst it's tempting to use words and phrases we think the DfE and others want to see, my advice would be to avoid platitudes and buzz words at all costs and focus on clarity and robust evidence. Remember that you will mostly be applying for additional public money through these bids, so it is vital that you are able to demonstrate a commitment to being accountable for both impact and value for money.

As with everything relating to education and schools, your people are your greatest asset, so I would urge you to give yourselves time to properly engage with key individuals and groups as you develop your bid. Whilst it will be obvious to engage with certain colleagues and probably governors and trustees (particularly if you are bidding for a fairly large amount), engaging the wider school community, including pupils and parents, can often give you valuable different perspectives on what could be achieved with the additional funding. If you have the time (and most funding opportunities have a reasonable application window) and you are bidding for a relatively large sum, consider doing some simple market research with pupils, parents and the local community to gather their views. However, keep this proportional, as it will depend on the criteria for the funding and how much you are aiming to secure.

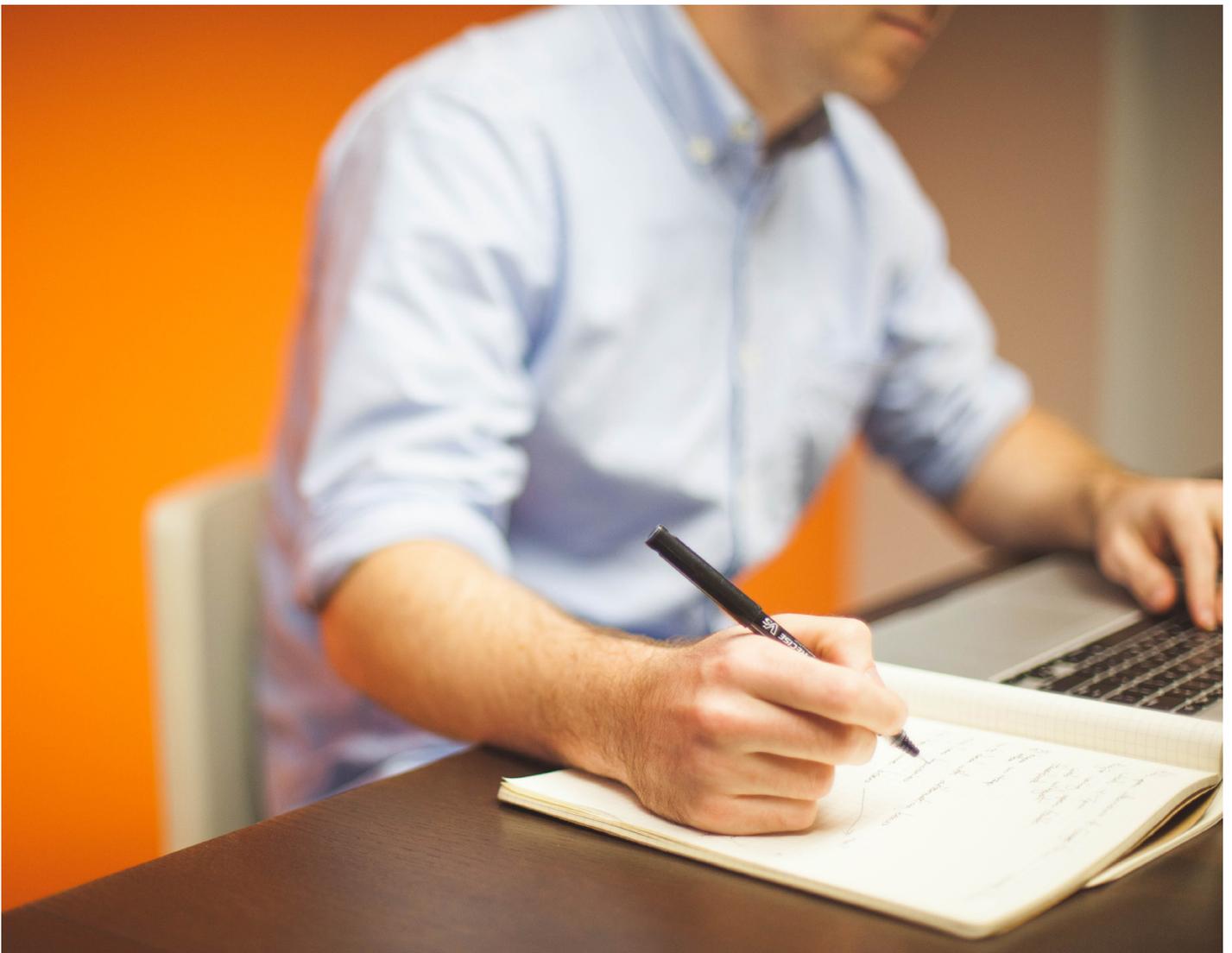
Be creative about using people's capacity to write funding bids and don't be tempted always to approach the same person, just because it naturally falls under their core role. We would always advise schools and groups of schools to undertake a regular skills audit of all their staff and governors/trustees, at least once a year, so that additional interests and capacity beyond their usual roles can be identified. Whilst you may wish to secure external support for larger bids (potentially on a success commission if appropriate), for smaller bids you are likely to find that you have a number of colleagues with a passion and talent for writing strong bids and they might not always be those you expect!

“Research skills and the ability to present a cohesive and compelling case are at a premium!”

A note of caution; if you are applying for a relatively large amount of funding in order to support a number of different projects within your school or group, please consider engaging a colleague with project management experience who can be responsible for coordinating all the different elements and ensuring that everything remains on track. Research skills and the ability to present a cohesive and compelling case are at a premium! Again, your regular skills audit will be able to help you identify colleagues with these skills.

Finally, a few practical hints and tips:

- An obvious one, but please check the deadline! Don't leave yourselves short of time so that you have to rush the application process; it goes without saying that the more prepared you are the more likely you are to be successful.
- Look at word limits for the different sections – this is particularly important for DfE applications as they almost always have a fairly tight word limit.
- Use the spell checker; AND ask someone else (preferably someone who hasn't actually helped to write the bid) to look at it with a fresh pair of eyes to sense check it against the criteria.
- Check that any references to research or data you refer to in your bid are up-to-date and referenced correctly.
- Be mindful of conflicts of interest for staff, governors or trustees when applying for funding. If they arise, manage them appropriately and be upfront about how you have done so.



Research & Resources Digest

July 2017



This edition's research round-up focuses on the resources available to support schools to become financially more efficient and sustainable, in particular in the context of ongoing uncertainty following the general election about the level of funding that will be available to schools during this parliament. The articles below summarise some of the key guidance from the Department for Education (DfE) and the Education and Skills Funding Agency (ESFA), as well as a couple of recent reports on the subject of school financial sustainability.

Secretary of State announces additional funding and 'transition' to National Funding Formula

The Secretary of State has announced (17th July) that the government will maintain per pupil funding in real terms for the next three years. This is as a result of £1.3 billion additional funding being pledged by the government.

The additional funding will be delivered through the National Funding Formula – which will now be introduced through a phased transition between 2018/19 and 2020. The Secretary of State said that:

"This formula settlement 2019/20 will provide at least £4800 per pupil for every secondary school..... The National Fair Formula will therefore provide higher per pupil funding in respect of every school and in every local area..... It remains our intention that a school's budget should be set on the basis of a single national formula. But a longer transition does make sense to provide the stability for schools.

continued ...



Rt Hon Justine Greening,
Secretary of State for
Education

In 2018/19 and 2019/20 the national funding formula will set indicative budgets for each school and the total schools funding received by each local authority will be allocated according to our national fair funding formula - and transparently for the first time. Local Authorities will then continue to set a local formula to distribute that funding as they do now and for determining individual school's budgets in 2018/19 and 2019/20 in consultation with schools in that area and I will shortly publish the operational guidelines to allow them to begin that process. To support their planning, in 2018/19 all local authorities will also receive some increase over the amount that they plan to spend on schools and high needs in 2017/18 and we will confirm gains based on that final formula in September."

Rt Hon Justine Greening, Secretary of State for Education, 17th July 2017

The additional money will be achieved by finding efficiencies in the Department for Education's existing budget, and will come from areas such as capital spending and spending on free schools.

Financial sustainability of schools – NAO report

The National Audit Office (NAO) published a report on the financial sustainability of schools in December (2016) (<https://www.nao.org.uk/report/financial-sustainability-in-schools/>) which suggested that the government's approach to managing the risks to schools' financial sustainability could not be judged to be effective or providing value for money until more progress was made. The report stated that the Department for Education (DfE) had not clearly communicated to schools the scale and pace of the savings required and did not know whether schools would achieve them in practice. The report stated that whilst the DfE had developed and published advice and guidance to help schools improve their financial management and achieve efficiency savings, it had not yet completed work to help schools' crucial procurement and workforce savings. The NAO analysis indicated that while the financial position of primary schools had been relatively stable, there were signs of financial challenges in secondary schools. It also suggested that the Education Funding Agency (now the Education and Skills Funding Agency) should intervene earlier and more often with local authorities when it has financial concerns about maintained schools.



Guidance

Schools financial health and efficiency

The DfE and ESFA have, since January 2016, been adding information, tools and guidance to their collection on schools financial health and efficiency. These resources include some 'top tips' for strategic planning and efficiency in schools (<https://www.gov.uk/guidance/making-the-most-of-financial-review-and-self-assessment-tools>) including achieving value for money from teaching costs and support staff, sharing a skilled financial practitioner with other schools, and considering how schools can maximise their income, selling key skills to other schools and achieving income from other areas such as letting space.

The ESFA has also published guidance providing information for schools on making the most of financial review and self-assessment tools (<https://www.gov.uk/guidance/making-the-most-of-financial-review-and-self-assessment-tools>). They have also produced a video where colleagues from the DfE and WISE Academies discuss some of the themes surrounding schools financial health and efficiency, covering benchmarking, sharing good practice, and the role of school business management within an academy trust (<https://www.gov.uk/guidance/answering-questions-on-schools-financial-health-and-efficiency>).

This section of the DfE website also provides a range of resources on financial management and efficient resourcing, which looks at school workforce planning, strategic financial planning, budgeting with a 3 to 5 year plan, the role of the school business manager, and maintaining good financial health (<https://www.gov.uk/government/collections/schools-financial-health-and-efficiency>).

There are a range of case studies, providing examples of how schools and academies have developed effective financial management, resulting in better educational outcomes for children and young people, including around strategic financial planning, staffing and timetabling, procurement and back office efficiency savings, skills and tools for managing school finance effectively, and curriculum based planning (<https://www.gov.uk/government/collections/schools-financial-efficiency-case-studies>).

Guidance for governors and trustees

The DfE and ESFA have produced guidance for school governors and academy trustees, to support them in their key role of ensuring schools manage their finances efficiently. This guidance includes 'top 10 planning checks for governors' (<https://www.gov.uk/guidance/schools-financial-efficiency-top-10-planning-checks-for-governors>) which senior staff in schools and multi-academy trusts will also find useful. The planning checks are:

- Staff pay as percentage of total expenditure
- Average teacher costs
- Pupil to teacher ratio
- Class sizes
- Teacher contact ratio
- Proportion of budget spent on the leadership team
- 3 to 5 year budget projections
- Spend per pupil for non-pay expenditure lines compared to similar schools
- School improvement plan priorities and the relative cost of options
- List of contracts with costs and renewal dates



Schools' buying strategy

The Department for Education (DfE) published guidance (20 January) for schools to help them improve how they buy goods and services (<https://www.gov.uk/government/publications/schools-buying-strategy>) with the aim of supporting schools to save over £1 billion a year by the 2019 to 2020 academic year on non-staff spend. The strategy includes a range of initiatives to support improved schools' buying, including: access to buyers' networks and help with more complex buying, practical help and advice on being a smart consumer, and access to better deals and making buying easier.



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