

School Resource Management

in partnership with



Department
for Education

An Introduction to Benchmarking – Resource Pack
School Resource Management Self-Assessment Tool

December 2020

Additional guidance is available on these websites:

Academies: <https://www.gov.uk/government/publications/school-resource-management-self-assessment-tool>

Maintained: <https://www.gov.uk/government/publications/schools-financial-value-standard-sfvs>

Self-Assessment Tool Dashboard – Step-by-step Guide

School resource management self-assessment dashboard

Effective resource management is about how a trust uses its resources to drive outcomes for its pupils. A trust can improve outcomes by using its resources more effectively.

The dashboard below is designed to help trusts identify areas for improved resource management. It shows how a school compares to thresholds on a range of key indicators.

A. Information about your school(s)

Using the dashboard

The dashboard data should be completed at school level. Sixth form colleges do not need to complete the dashboard.

Schools and trusts should use the most up to date data available to them, and not rely on lagged published data.

Complete all highlighted cells.

Click here to add another school →

School name:	<input style="width: 80%;" type="text"/>
Phase:	<input style="width: 80%;" type="text"/>
Region:	<input style="width: 80%;" type="text"/> <ul style="list-style-type: none"> Primary Secondary with sixth form Secondary without sixth form All-through Special Nursery
Number of pupils	<input style="width: 80%;" type="text"/>
% of pupils eligible for FSM:	<input style="width: 80%;" type="text"/>
I'm entering data for the	<input style="width: 80%;" type="text"/>

Academies: Can use this to look at all schools in your MAT

Phase of school entered here (options expanded since launch)

Note the academy and maintained sheets look slightly different but another than the function to look at multiple schools at once are fundamentally the same

Self-Assessment Tool Dashboard

A. Information about your school

School name:	
School LA/Estab number:	
Phase:	
Region:	
Number of pupils:	
% of pupils eligible for FSM:	
I'm entering data for the year:	

[Click here](#) to see the RAG rating data for this school

Input the school's percentages and ratios directly below, or [click here](#) to input raw spending and characteristics data for your school

To reset the form to draw from the raw spending and characteristics data, [click here](#). Macros must be enabled

This school is being compared to other:

	The school's data	Rating against thresholds
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B. Spending as a percentage of total expenditure		
Spend on teaching staff as a percentage of total expenditure	Guidance	
Spend on supply staff as a percentage of total expenditure	Guidance	
Spend on education support staff as a percentage of total expenditure	Guidance	
Spend on administrative and clerical staff as a percentage of total expenditure	Guidance	
Spend on other staff costs as a percentage of total expenditure	Guidance	
Spend on premises (including staff costs) as a percentage of total expenditure	Guidance	
Spend on teaching resources as a percentage of total expenditure	Guidance	
Spend on energy as a percentage of total expenditure	Guidance	
Other spending as a percentage of total expenditure (balancing line)	Guidance	

C. Reserves / balances as a percentage of total income		
In-year balance as a percentage of total income	Guidance	
Revenue reserve as a percentage of total income	Guidance	

D. School characteristics		
Average teacher cost (£)	Guidance	
Senior leaders as a percentage of workforce	Guidance	
Pupil to teacher ratio	Guidance	
Pupil to adult ratio	Guidance	
Teacher contact ratio (less than 1.0)	Guidance	
Predicted percentage pupil number change in 3-5 years	Guidance	
Average class size	Guidance	

E. Outcomes		
Ofsted rating	Guidance	
Progress 8 score	Guidance	
Progress score in reading	Guidance	
Progress score in writing	Guidance	
Progress score in maths	Guidance	

Complete sections B to E on the dashboard tab to get some RAG ratings comparing you to similar schools, as per the basic information you complete in section A

Note section B must add up to 100%.

These metrics are covered by the Integrated Curriculum Financial Planning (ICFP) metrics deep dive short course available to book on <https://www.educationspace.co.uk/SRM/>

Self-Assessment Tool Dashboard

Raw data form

This form can be used to input raw spend and characteristics information. If used, the information in this table will be used to calculate the percentages and ratios required in the dashboard. The percentages and ratios can also be inputted directly into the dashboard.

Schools should use the most up to date information available to them, and not rely on lagged published data.

All of the data should refer to the same financial year.

Add up to 20 schools by using the **Click here to add another school** buttons. Macros must be enabled for this feature.

[Click here to add another school →](#)

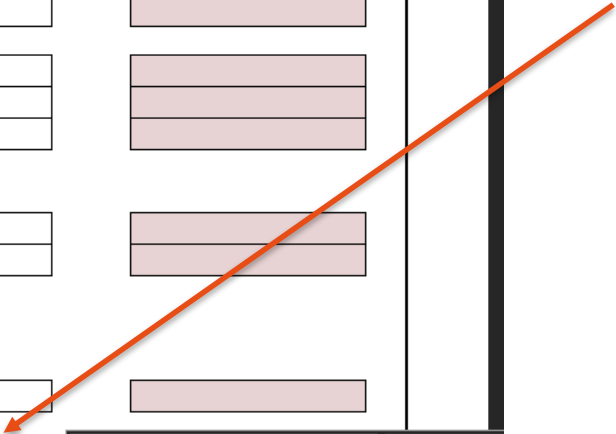
School name:

and characteristics data for this school below, or [click here](#) to input the school's percentages and ratios directly into the dashboard

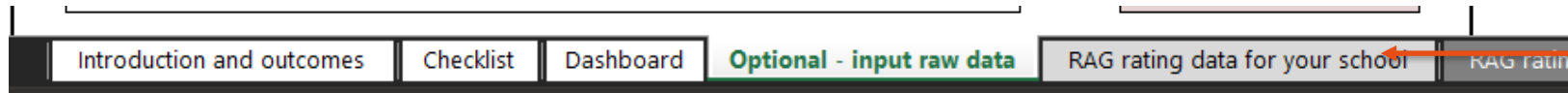
Full time equivalent number of teachers (classroom and leadership)	
Full time equivalent of teachers in the leadership group	
Full time equivalent of total school workforce	
Total expenditure	
Total income	
Revenue balances (committed and uncommitted)	
<i>For secondary and all-through schools:</i>	
Teaching periods in the timetable cycle	
Total lessons taught by all teachers in the timetable cycle	
<i>For primary schools:</i>	
Total number of classes	

Introduction and outcomes
Checklist
Dashboard
Optional - input raw data
RAG rating data for your school
RAG rating

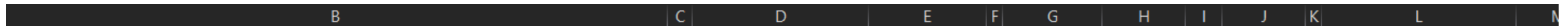
You can enter raw data into this tab and the form will automatically calculate your percentages and ratios used in the Dashboard. Note this is optional.



Self-Assessment Tool Dashboard



This tab contains what numbers fit into the RAG rating system used



Select which school to show the RAG ratings for:

Example School

Your school has been identified as:

- a secondary school with a sixth form
- outside London
- a large school because it has more than 1085 pupils
- a school with high levels of FSM because more than 11% of pupils are eligible

You have identified your data as 2019/20

The thresholds for the RAG ratings are based on these characteristics and are:

B. Your spending as a percentage of expenditure

	Red rating	Amber rating	Light green rating
Spend on teaching staff as a percentage of total expenditure	Less than or equal to 47.5% Or more than 61.7%	Between 47.5% and 48.8% Or between 59.3% and 61.7%	Between 48.8% and 59.3% Or between 61.7% and 56.0%

This can be useful if you want to see, for example, how far your school needs to go to get into a green category

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An online version of the Self-Assessment Dashboard can be found on the Schools Financial Benchmarking Website.

<https://schools-financial-benchmarking.service.gov.uk/>

If required, full details of how to get here is shown in that resource pack

School X

🚩 **Set as default school** 📄 **View quick comparison report** ?

Compare with other schools Remove from benchmark basket

Address:

Telephone number:

Local authority: [Southwark](#)

School type: **Academy converter**

School phase: **Secondary**

Number of pupils: **2026**

URN:

Ofsted rating: **1 Outstanding** | [Ofsted report](#)
Inspected 15 June 2017

LAESTAB: **210 4265**

Age range of pupils: **11 to 18**

Headteacher's name:

Has sixth form: **Yes**

Has nursery: **No**

Date of opening: **01 November 2010**

School website:

Data from other services: [School performance tables](#) | [Get more information](#)

[Do you have a query about this school's data?](#)

This school's analytics

[Efficiency metric ranking](#)

[Self-assessment dashboard](#)



Self Assessment Dashboard can be accessed here

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The output is essentially the same as in the spreadsheet version

You can click on the ? beside each category for a breakdown of the RAG ratings.

Self-assessment dashboard

Assessing **School X** using 2018/2019 finance data. This data includes MAT central finance.

[View characteristics used](#)

[Download page](#) [Print page](#)

Add a side-by-side scenario

2018/2019 submitted data

Scenario year 2018/2019
[Edit data](#)

Reserve and balance

Assessment area	School data	% of income	Rating against thresholds
In-year balance	-£79,000.00	-1.0%	Medium Risk ?
Revenue reserve	£14,000.00	0.0%	Low Risk ?

Spending

Assessment area	School data	% of exp.	Rating against thresholds
Teaching staff	£8,766,000.00	57.0%	Middle 20% of similar schools ?
Supply staff	£974,000.00	6.0%	Highest 10% of similar schools ?
Education support staff	£286,000.00	2.0%	Broadly in line with similar schools ?
Administrative and clerical staff	£244,000.00	2.0%	Broadly in line with similar schools ?
Other staff costs	£28,000.00	0.0%	Broadly in line with similar schools ?
Premises costs	£981,000.00	6.0%	Broadly in line with similar schools ?
Teaching resources	£1,246,000.00	8.0%	Broadly in line with similar schools ?
Energy	£218,000.00	1.0%	Broadly in line with similar schools ?

% of exp.	Rating against thresholds
0.0% - 50.5%	Lowest 10% of similar schools
50.5% - 53.0%	Lowest 20% of similar schools
53.0% - 56.0%	Broadly in line with similar schools
56.0% - 58.5%	Middle 20% of similar schools
58.5% - 61.5%	Broadly in line with similar schools
61.5% - 64.0%	Highest 20% of similar schools
64.0% - 100.0%	Highest 10% of similar schools

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 Download page  Print page

Add a side-by-side scenario

2018/2019 submitted data

Scenario year 2018/2019

[Edit data](#)

Customisable elements of the Self-Assessment Dashboard are done by clicking either: Edit data or Add a side-by-side scenario.

NB – these are **not saved** for other users – they are only saved in your own browser. You can clear the data easily, and this should be done when using a shared computer to protect sensitive scenario planning.

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An example of an added scenario which can be easily compared to other school scenarios as well as with the results of your comparison group.

2018/2019 submitted data

Scenario year 2018/2019

[Edit data](#) | [Remove](#)

Reduction in Pupil numbers

Scenario year 2019/2020

[Edit data](#) | [Remove](#)

Reserve and balance			Reduction in Pupil numbers			
Assessment area	School data	% of inc.	Rating against thresholds	School data	% of inc.	Rating against thresholds
In-year balance	-£79,000.00	-0.5%	Medium Risk ?	-£400,000.00	-2.7%	Medium Risk ?
Revenue reserve	£14,000.00	0.1%	Low Risk ?	£5.00	0.0%	Low Risk ?

Spending			Reduction in Pupil numbers			
Assessment area	School data	% of exp.	Rating against thresholds	School data	% of exp.	Rating against thresholds
Teaching staff	£8,766,000.00	56.9%	Middle 20% of similar schools ?	£8,600,000.00	55.8%	Broadly in line with similar schools ?
Supply staff	£974,000.00	6.3%	Highest 10% of similar schools ?	£800,000.00	5.2%	Highest 10% of similar schools ?
Education support staff	£286,000.00	1.9%	Broadly in line with similar schools ?	£200,000.00	1.3%	Broadly in line with similar schools ?
Administrative and clerical staff	£244,000.00	1.6%	Broadly in line with similar schools ?	£240,000.00	1.6%	Broadly in line with similar schools ?
Other staff costs	£28,000.00	0.2%	Broadly in line with similar schools ?	£10,000.00	0.1%	Broadly in line with similar schools ?
Premises costs	£981,000.00	6.4%	Broadly in line with similar schools ?	£990,000.00	6.4%	Broadly in line with similar schools ?
Educational supplies	£1,246,000.00	8.1%	Broadly in line with similar schools ?	£1,246,000.00	8.1%	Broadly in line with similar schools ?
Energy	£218,000.00	1.4%	Broadly in line with similar schools ?	£400,000.00	2.6%	Highest 10% of similar schools ?



Hard Copy and Recording Available

*A copy of the presentation, as well as a
recording of the talk, is available on
www.educationspace.co.uk/SRM/*