



# ICFP Toolkit Lite

User Guide

July 2020

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## Introduction

EPI delivers high performance, education focused business services to schools in the UK.

EPI was founded in 2015 with a focus on providing robust business management services. Since then, we have grown our business and become a supplier to the Department of Education for School Resource Management and an approved supplier to the ESFA for financial support for schools. In addition to this we have worked nationally and internationally to support schools in a range of financial matters.

Our vision is to work with every school, empowering education in partnership through our innovative approach to the business of education.

This toolkit has been developed alongside the SRMA programme which represents a major opportunity for EPI to be nationally recognised as an organisation that supports schools with strategic school resource management.

This toolkit can be used by a range of stakeholders in the sector and is designed to support: Primary, Secondary, Special, Alternative, Nursery and Multi-Academy Trusts. As the toolkit is developed with schools, we will continually update functionality and make this available to the sector.

## What's available in our Efficiency Toolkit

The current version of the Efficiency Toolkit has the ability to:

1. Input staffing and budget data
2. Calculate Headline KPI's (Contact Ratio, PTR etc.).
3. Calculate KPI's as a percentage on income and expenditure
4. Calculate Per Pupil Metrics
5. Benchmark these KPI's against national data thresholds for Primary and Secondary Schools using DFE School Resource Management 2019/20 Data.
6. Forecast KPI's over future years based upon proposed budgetary and staffing changes.

## Future planned developments

We are working on a new online version of our toolkit which in addition to the above will:

1. Allow MAT's to input their Trust wide data into one tool
2. Allow MAT's to benchmark all schools across the trust in one dashboard, as well as a single school against national benchmarks or targets
3. Enable Trustees and Senior Leaders to set targets to measure against through an academic year and multiple years
4. Create measurable actions linked to a schools Improvement Plan and ICFP metrics
5. Assess the Trusts KPI's against national benchmarks, including DFE, Kreston Reeves, OGAT, ASCL as well as our own developing dataset, with the ability to select appropriate benchmarks against key context characteristics for each school or trust
6. Support greater analysis of curriculum structure, including deployment of teaching, TA,s and support staff as well as a SEN specific curriculum designer
7. Import staffing, budget and current curriculum data from SIMS, HCSS, FMS and PSF.



- Total Income
- Total Expenditure
- Total Non Staff Costs
- Supply Costs
- Facilities Management
- Cleaning & Catering
- Educational Supplies
- Premises
- Business Admin
- Energy

Within the metric dashboard, calculations are made for each year against the selections made in the budget mapping. It is acceptable to select more than one line of the budget to map to one matrix.

### Curriculum Data

The Curriculum tab allows you to setup your current year curriculum and cross check this against your staffing input into the Staffing tab. The following fields are available to input:

Field	Notes
Faculty	Free text to enter the faculty associated to a subject.
Subject	Enter the name of each subject being taught. This then becomes an available subject in the staffing tab to map your curriculum against.
Forms of Entry	For each year confirm the forms of entry
Number of Groups	Specify by Year the number of groups for each subject.
Number of Lessons	Specify by Year the number of lessons for each group.

Curriculum Input		Year N	Year R	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Total Teaching Periods Required	Teaching Periods Available	Difference
Faculty	Subject	Number of Students	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
		Forms of Entry																	
		Number of Groups																	
		Separate Lessons																	
		Number of Periods	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
		Number of Groups																	
		Separate Lessons																	
		Number of Periods	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

The calculated columns at the end inform you of how many periods are required for each subject vs. the allocated periods in the Staffing tab. This data is then used to calculate key metrics available on the Dashboard.

### Staffing Data

The Staffing Input sheet should be used to map across from your chosen HR system into the toolkit. Input data into each of the headings as follows:

Field	Notes.
First Name	Optional.
Last Name	Optional.

Teacher/Support	Yes/No This determines in a employee should be mapped to the teaching or support staff KPI's. If Teaching is not selected, then this will exclude the record from contact ration and pupil teacher ratio.
SLT	Yes/No
TLR (Amount)	Enter monetary value.
Job Title	Optional.
PY	FTE for Previous Year.
CY	FTE for Current Year.
FY1	FTE for Forecast Year 1 (Predicted or Known).
FY2	FTE for Forecast Year 2 (Predicted for Know).
PY Available Usage	This is calculated for Teaching Staff only. This is FTE x Teaching Periods in the Week. This is for Prior Year only.
PY Teaching Deployment	Enter the number of periods that this employee taught. Exclude MAT leave, PPA, Leadership and any other intervention based teaching.
CY Total Available Usage	This is calculated for Teaching Staff only. This is FTE x Teaching Periods in the Week.
Deployment by Subject	Enter the Current Year teaching for each employee by subject, the subjects are pre-populated from the Curriculum tab.
PPA	Enter the Current Year PPA periods.
Leadership	Enter the Current Year Leadership periods
Other	Enter any other periods associated with the employee for Current Year.
CY Teaching Deployment	This is calculated for Current Year from the Deployment by Year Group data.
Total Deployment	Automatically calculated from CY Teaching Deployment, PPA, Leadership and Other.
Difference	Displays the difference for Current Year between CY Total Available Usage and Total Deployment.
FY1 Available Usage	This is calculated by taking the FY1 FTE x Forecast Year 1 Teaching Periods.
Deployment Teaching Change	Enter the change in periods being taught between the CY Teaching Deployment and the forecast year. If no change, remain blank.
FY1 Teaching Deployment	Calculated by adding the CY Teaching Deployment with the change F1 Change of Teaching Deployment to achieve a revised deployment for the forecast year.
FY2 Available Usage	This is calculated by taking the FY2 FTE x Forecast Year 1 Teaching Periods.
Deployment Teaching Change	Enter the change in periods being taught between the FY1 Teaching Deployment and the forecast year. If no change, remain blank.
FY2 Teaching Deployment	Calculated by adding the FY1 Teaching Deployment with the change F2 Change of Teaching Deployment to achieve a revised deployment for the forecast year.

This is the most complex of the data input pages. There can currently be a maximum of 3000 employees in the data. Once entered, it is envisaged this can be maintained by the user as changes are made.

## School Characteristics

The school characteristics page is the final data entry page where users should:

1. Enter the financial years for the dashboard
2. The school type
3. Whether the school is based in London
4. School census data
5. FSM %
6. Periods per week

School Characteristics				
Enter financial years for ICFP Dashboard				
Year	Prior Year	Current Year	Future Year	Future Year
School Type <input type="text"/>				
Enter data as at October census in that year and future projection:				
Census	Prior Year	Current Year	Future Year	Future Year
N				
R				
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
TOTAL	0	0	0	0
Enter FSM %				
FSM Year	Prior Year	Current Year	Future Year	Future Year
Enter Periods Per Week for Timetable Cycle				
Year	Prior Year	Current Year	Future Year	Future Year

# Dashboard

## EPI ICFP Toolkit

Academy / School Name:

[INSERT ACADEMY NAME]



### Dashboard

Headline KPI's	Prior Year	Benchmark	Current Year	Benchmark	Forecast Year 1	Benchmark	Forecast Year 2	Benchmark
Year	0		0		0		0	
Pupil: teacher ratio	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Pupil: staff ratio	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Average teacher cost (inclusive of on-costs)	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Average class size	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Teacher contact ratio	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Predicted % change in pupil numbers (+/- %)								
Cost of one lesson (running for a year)	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
SLT as % of TTC	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Mgt as % of TTC	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
<b>As % of Expenditure</b>								
Proportion of total spend on staff pay	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Proportion of total spend on teaching staff pay	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Proportion of total spend on classroom support staff pay	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Proportion of total spend on clerical & administrative staff pay	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Proportion of total spend on senior leadership staff pay[6]	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Proportion of teaching staff spend on management costs	#DIV/0!		#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
<b>As % of Income</b>								
Proportion of total spend on staff pay	#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	
Proportion of total spend on teaching staff pay	#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	
Proportion of total spend on classroom support staff pay	#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	
Proportion of total spend on clerical & administrative staff pay	#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	
Proportion of total spend on senior leadership staff pay[6]	#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	
Proportion of teaching staff spend on management costs	#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	
<b>Per Pupil Metrics</b>								
Total income per pupil	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Total expenditure per pupil	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Direct Grant Funding	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Self-Generated Income	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Supply/agency cost per pupil	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Staff	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Non-staff	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Facilities management	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Cleaning & catering	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Educational supplies	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Premises	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Business admin	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Energy	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

The dashboard page automatically calculates the KPI's listed based upon the data input into the budget, staffing and school characterises pages. Benchmarking is calculated for the following:

Headline KPI's	Option	Benchmark Source
Year		
Pupil: teacher ratio	Secondary or Primary	DFE
Pupil: staff ratio	Secondary or Primary	DFE
Average teacher cost (inclusive of on-costs)	Secondary or Primary	DFE
Average class size	Secondary or Primary	DFE
Number of periods per week	N/A	N/A
Teacher contact ratio	Secondary or Primary	DFE
Curriculum headroom/curriculum bonus	Secondary or Primary	DFE
Predicted % change in pupil numbers (+/- %)	Secondary or Primary	DFE
Cost of one lesson (running for a year)	Secondary or Primary	DFE
SLT as % of TTC		
Mgt as % of TTC		
<b>As % of Expenditure</b>		
Proportion of total spend on staff pay	Secondary or Primary	Kreston Reeves
Proportion of total spend on teaching staff pay	Secondary or Primary	Kreston Reeves
Proportion of total spend on classroom support staff pay	Secondary or Primary	Kreston Reeves
Proportion of total spend on clerical & administrative staff pay	Secondary or Primary	Kreston Reeves
Proportion of total spend on senior leadership staff pay[6]	Secondary or Primary	Kreston Reeves
Proportion of teaching staff spend on management costs	Secondary or Primary	Kreston Reeves
<b>As % of Income</b>		
Proportion of total spend on staff pay	Secondary or Primary	EPI Dataset
Proportion of total spend on teaching staff pay	Secondary or Primary	EPI Dataset
Proportion of total spend on classroom support staff pay	Secondary or Primary	EPI Dataset
Proportion of total spend on clerical & administrative staff pay	Secondary or Primary	EPI Dataset
Proportion of total spend on senior leadership staff pay[6]	Secondary or Primary	EPI Dataset
Proportion of teaching staff spend on management costs	Secondary or Primary	EPI Dataset
<b>Per Pupil Metrics</b>		
Total income per pupil	Secondary or Primary	Kreston Reeves
Total expenditure per pupil	Secondary or Primary	Kreston Reeves
Direct Grant Funding	Secondary or Primary	Kreston Reeves
Self-Generated Income	Secondary or Primary	Kreston Reeves
Supply/agency cost per pupil	Secondary or Primary	Kreston Reeves

Staff	Secondary or Primary	Kreston Reeves
Non-staff	Secondary or Primary	Kreston Reeves
Facilities management	Secondary or Primary	Kreston Reeves
Cleaning & catering	Secondary or Primary	Kreston Reeves
Educational supplies	Secondary or Primary	Kreston Reeves
Premises	Secondary or Primary	Kreston Reeves
Business admin	Secondary or Primary	Kreston Reeves
Energy	Secondary or Primary	Kreston Reeves

Benchmarking for each of the KPI areas use different colours whether above, below or within a KPI measure. Each category of KPI's is listed below showing which measures are used against the category:

KPI Measure	Colour	Headline KPI	As % Expenditure	As % Income	Per Pupil Measures
Below KPI		✓	✓	Not Available	✓
Within KPI		✓	✓	Not Available	
Above KPI		✓	✓	Not Available	✓

Benchmarking is currently based upon the following datasets:

School Type	Dataset
Primary	Primary
Secondary	Secondary
Special	Primary
Alternative Provision	Secondary
Allthrough	Secondary
Nurse	Primary