

Schools Financial Benchmarking Guidance

The government's Schools Financial Benchmarking site allows you to check how your school's finances compare with other similar schools up and down the country.

You can [compare your school's income and expenditure with other schools in similar circumstances](#) (benchmarking), to see if spending could be more efficient.

You can:

- identify schools that are similar to yours, or with similar challenges
- compare your school's financial data with similar schools
- find contact details for schools

Benchmarking helps you plan

For school budgets, there are 4 main cost areas:

- teachers
- other staff
- supplies and services
- buildings and land

Benchmarking helps you:

- look at spend in these areas overall, as well as sub-categories of spend
- compare your spend with other similar schools
- inform your school development process

Benchmarking helps you make changes

Benchmarking helps you to consider how to use your resources to support high-quality teaching and the best education outcomes for your pupils.

Benchmarking helps you to connect with other schools to discuss challenges and successes. This can help you consider whether:

- your resource allocations are working for you
- you can improve outcomes by doing things differently

Other benefits

- Helps demonstrate best value for money
- Helps question the norm and to make changes
- Helps identify savings
- Targets areas for improvement

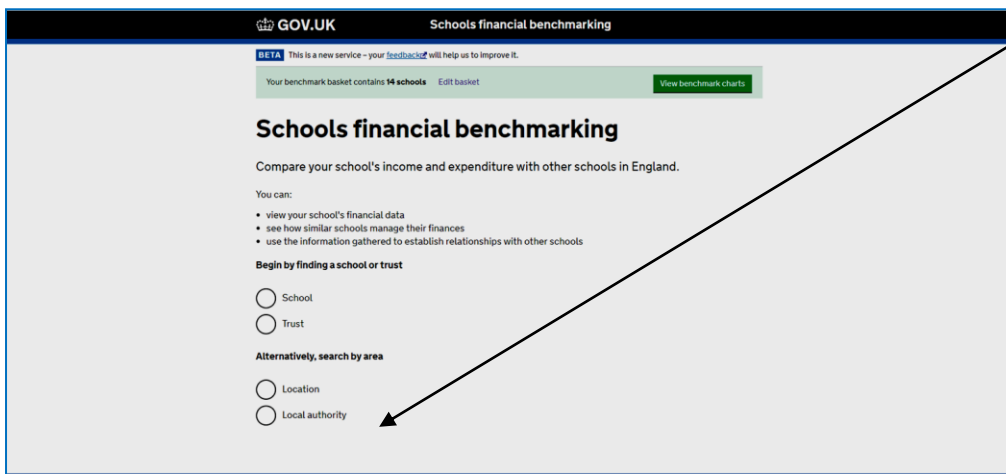
Limitations of benchmarking

Benchmarking is only a guide. Some schools may find themselves at the lower or upper extremes of the data and these are the areas to focus on. You should consider other things you know about your school when assessing the data. Different schools may code income/expenditure in different ways despite the CFR guidelines, which is human nature.

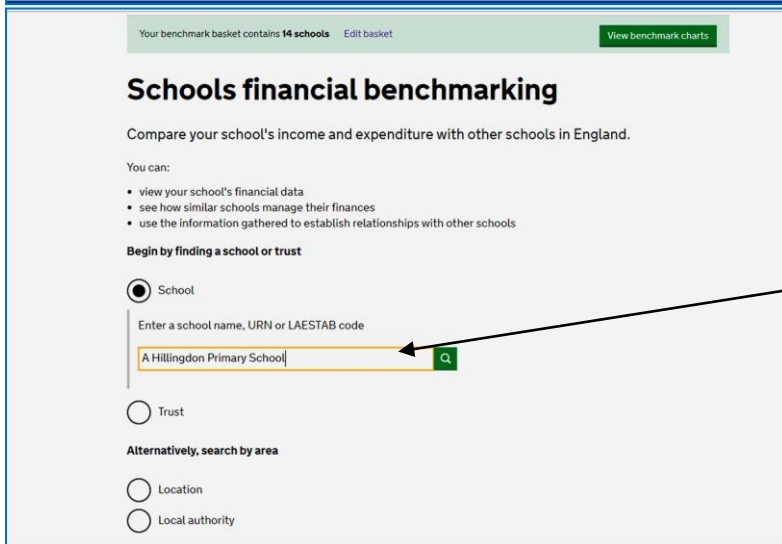
Getting Started

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

- Once you have accessed the web page you need to select your school by selecting the criteria



The screenshot shows the top of the 'Schools financial benchmarking' website. At the top, it says 'GOV.UK' and 'Schools financial benchmarking'. Below that, there is a 'BETA' notice and a status bar indicating 'Your benchmark basket contains 14 schools' with an 'Edit basket' link and a 'View benchmark charts' button. The main heading is 'Schools financial benchmarking' followed by the text 'Compare your school's income and expenditure with other schools in England.' Underneath, it lists 'You can:' with three bullet points: 'view your school's financial data', 'see how similar schools manage their finances', and 'use the information gathered to establish relationships with other schools'. The section 'Begin by finding a school or trust' has two radio buttons: 'School' and 'Trust'. Below that, 'Alternatively, search by area' has two radio buttons: 'Location' and 'Local authority'. An arrow points from the 'Local authority' option to the next screenshot.



This screenshot shows the same website but with the 'School' radio button selected. Below the radio buttons, there is a text input field with the placeholder text 'Enter a school name, URN or LAESTAB code'. The field contains the text 'A Hillingdon Primary School' and has a green search icon to its right. An arrow points from a text box on the right to this search field.

Enter name of school

GOV.UK Schools financial benchmarking

Your benchmark set contains 16 schools [Edit benchmark set](#) [View benchmark charts](#)

Home

School

There are now several ways for you to compare this school against others.

[Start a comparison >](#)

[Add to benchmark set](#) [Download data for this school](#) [Print page](#)

Dashboard 2021 - 2022 **Details** Finance Workforce

Expenditure £3.21m **Income** £3.31m **In-year balance** £98.2k **Revenue reserve** £121.5k

This school's spending rating against similar schools

[View characteristics used](#)

Teaching staff Supply staff Education support staff Admin. and clerical staff Other staff costs Premises costs Educational supplies Energy

51.7%
Broadly in line with similar schools

51.6% - 54.1%

See more at this school's [self-assessment dashboard](#)

Financial data for the school appears on the Dashboard 20xx-20xx tab

Select Dashboard, Details, Finance or Workforce tabs

By clicking on the headings, you will be able to see at a glance how you compare with others with a percentage figure and a RAG rating

A quick comparison of this school's expenditure against similar schools

[View characteristics used](#) [View as tables](#)

Total expenditure Staff Premises Occupation Supplies and services Community expenditure Special facilities

| School | Per pupil |
|--|---------------|
| Rhodes Avenue Primary School | £6,437 |
| Collis Primary School | £6,172 |
| Coldfall Primary School | £5,995 |
| Marksath Junior And Infant School | £5,966 |
| Shewen Mount Primary School | £5,887 |
| Chase Bridge Primary School | £5,727 |
| Wimblader Park Primary School | £5,552 |
| St James's Roman Catholic Primary School | £5,510 |
| Eversley Primary School | £5,475 |
| Little Easing Primary School | £5,382 |
| Altenbrook Primary School | £5,260 |
| school | £5,156 |
| Danson Primary School | £5,125 |
| Middleton Primary And Nursery School | £4,733 |
| Brooklands Primary School | £4,729 |

See the [full version](#) of this quick comparison

Below is a quick comparison of overall expenditure per pupil against comparator schools. This can then be broken down by various categories such as Staff, Premises etc.

Next Steps

Related resources and services

Resources and services that complement the data shown on Schools financial benchmarking.

[School resource management collection](#)
This collection helps improve outcomes for pupils by getting the best value from school resources. We have produced a [short video](#) to explain how schools can maximise the impact on pupil outcomes.

[Explore education statistics](#)
Browse education statistical summaries, create tables and download data sets.

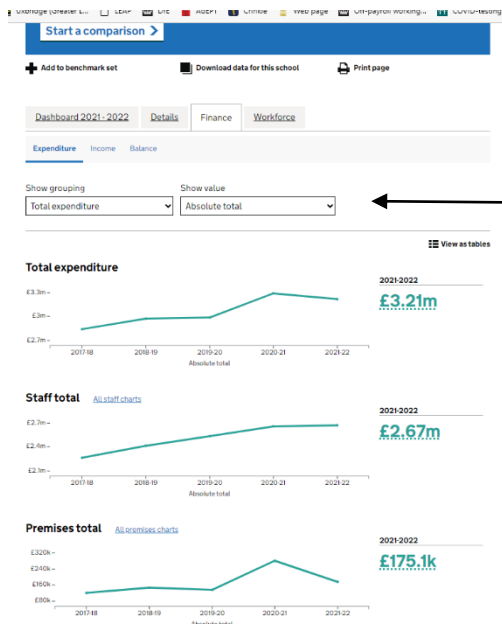
[Find school and college performance data in England!](#)
Search and check the performance of primary, secondary and special needs schools and colleges.

[Get information about schools](#)
Find and download information about schools, colleges, educational organisations and governors in England.

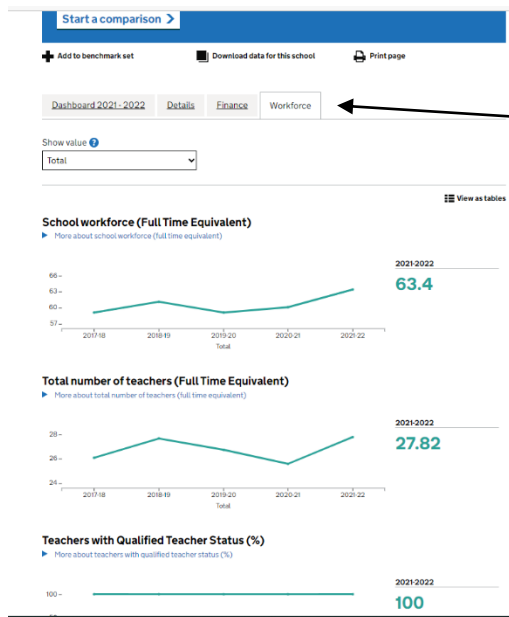
[Statistics at DfE](#)
View how and when the Department for Education publishes official statistics on education and children.

This section provides links to other resources and services that may be of interest

The Details tab provides various public information



The Finance tab gives a benchmark of Total expenditure over a 5 year period with a range of values available including per pupil and per teacher. The dropdown under Show grouping can also be selected for a breakdown of staff, premises, occupation etc. totals



The Workforce tab provides a host of data with options to compare overall totals, headcount per FTE and pupils per staff role

ome

Primary School

There are now several ways for you to compare this school against others.

[Start a comparison >](#)

When you are ready to compare your school with a more specific group of schools or to assess where your school is looking healthy or identify areas that need to be focussed on, click on 'Start a comparison'

[Back](#)

What type of comparison would you like?



Benchmark comparison

Compare against similar schools to yours or schools of your choice.

→ [Create a benchmark comparison](#)



Progress comparison

Examine your school's spending in relation to progress or compare your school against higher progress schools

→ [Highest progress schools comparison](#)
→ [Efficiency metric](#)



Self-assessment dashboard

Formerly the SRMSAT/SPVS dashboard, see areas where your school is looking healthy or may need to focus on.

→ [Self-assessment dashboard](#)

Click on Self-assessment dashboard



Self-assessment dashboard

Assessing [redacted] using 2021/2022 finance data.

[View characteristics used](#)

[Download data](#) [Print data](#)

[Add a custom dashboard](#)

2021/2022 submitted data

Dashboard year: 2021/2022

[Edit data](#)

Reserve and balance

| Assessment area | School data | % of inc. | Rating against thresholds |
|-----------------|-------------|-----------|---------------------------|
| In-year balance | £98,234.00 | 3.0% | Low Risk |
| Revenue reserve | £21,465.00 | 3.7% | Low Risk |

Spending

| Assessment area | School data | % of exp. | Rating against thresholds |
|-----------------------------------|---------------|-----------|---------------------------------------|
| Teaching staff | £1,660,923.00 | 51.7% | Steadily in line with similar schools |
| Supply staff | £20,598.00 | 0.6% | Steadily in line with similar schools |
| Education support staff | £628,320.00 | 19.5% | Steadily in line with similar schools |
| Administrative and clerical staff | £177,157.00 | 5.5% | Steadily in line with similar schools |
| Other staff costs | £180,230.00 | 5.6% | Highest 20% of similar schools |
| Premises costs | £175,102.00 | 5.4% | Steadily in line with similar schools |
| Educational supplies | £137,038.00 | 4.3% | Steadily in line with similar schools |
| Energy | £36,728.00 | 1.1% | Steadily in line with similar schools |

School characteristics

You will then be presented with a summary comparing recent metrics against similar schools which are RAG rated

What type of comparison would you like?

Benchmark comparison
Compare against similar schools for similar or schools of your choice.
→ [Create a benchmark comparison](#)

Progress comparison
Establish a baseline for your school or progress or compare your school against other progress schools.
→ [Start progress schools comparison](#)
→ [Checklist notes](#)

Self-assessment dashboard
Formerly the SREAT/SPVS dashboard, see areas where your school is looking healthy or may need to focus on.
→ [Self-assessment dashboard](#)

To make a more specific comparison, click on 'Create a benchmark comparison'

Which benchmark comparison would you like to do?

Comparing to: [Redacted]

- Quick comparison using pre-selected characteristics (number of pupils, school phase, urban/rural) ?
- Detailed comparison using characteristics you choose ?
- Manual comparison by name or location ?

Continue

Make a selection as required and click Continue, selecting the type of school and any other desired characteristics

Quick comparison 2 of 2

Refine your comparison results

Comparing to: [Redacted]

Find schools with a similar percentage of:

- Pupils eligible for free school meals
- Pupils with special educational needs who have statements or education and health care plans
- Pupils with English as an additional language

Location characteristic: ?

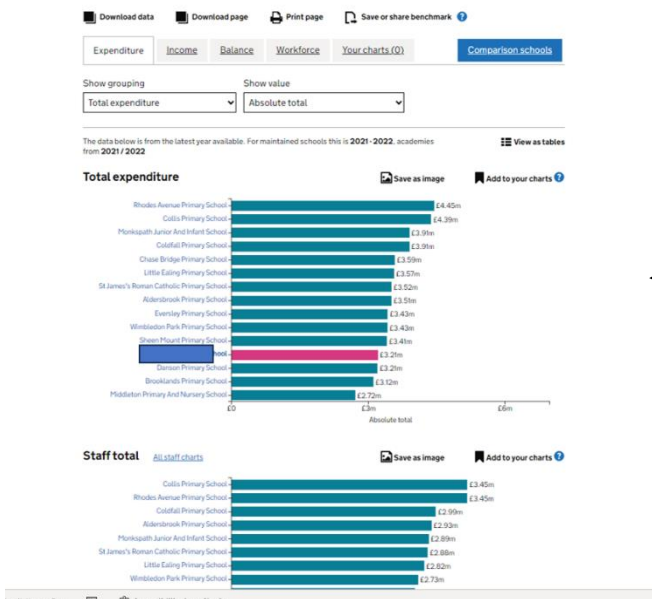
- Within the local authority (will produce fewer results if selected)

Number of schools in benchmark set: ?

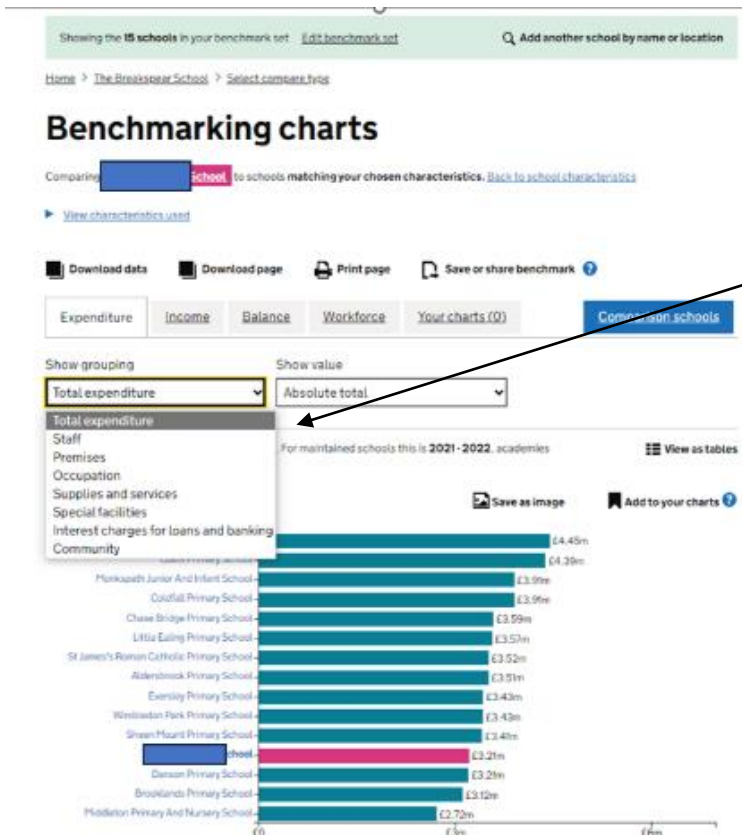
- Define the number of schools in the benchmark comparison (default is 15)

Continue to benchmarking charts

Click on Continue to Benchmarking charts

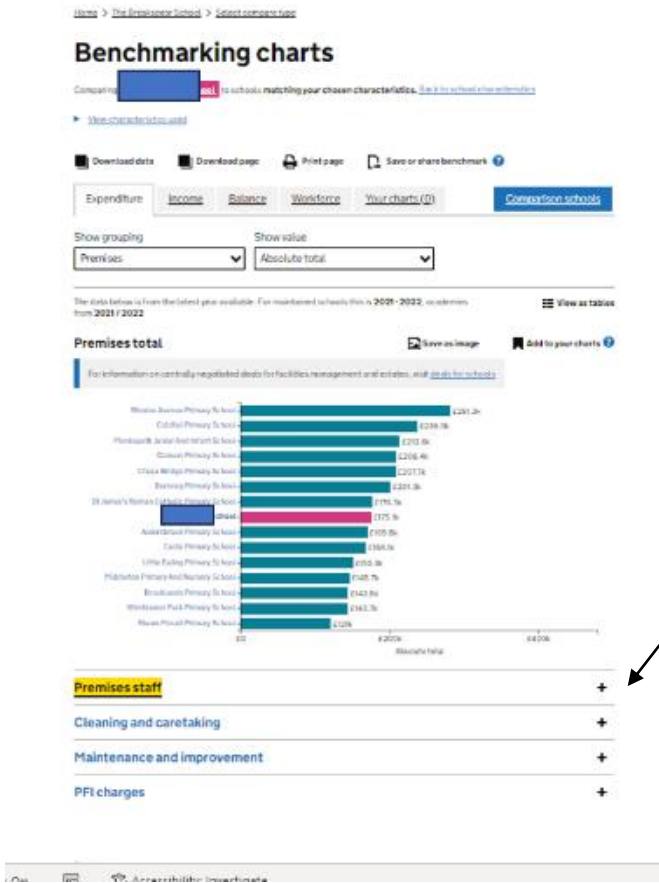


You are now presented with a range of comparisons with your school highlighted in pink



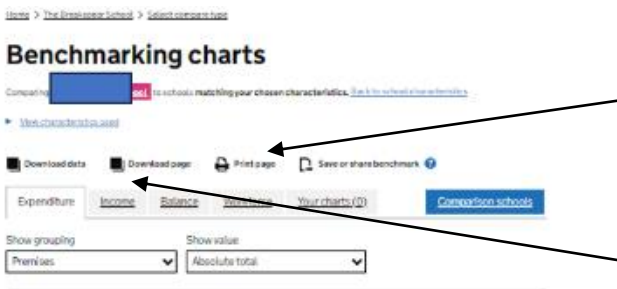
To select a specific area of interest, click on the appropriate heading. Options include:

- Staff
- Premises
- Occupation
- Supplies and services



To help drill down into the data, a further breakdown of expenditure is then available

You can proceed through Expenditure, Income and Balance tabs to determine the most useful comparisons



It is possible to print your selection where required.

Alternatively, data can be downloaded in CSV format, you can download the review in PowerPoint or the charts in PDF

Comparison with highest progress schools

It is possible to benchmark against schools that are achieving highest pupil progress that are similar in terms of per pupil expenditure, % FSM, number of pupils and location

What type of comparison would you like?



Benchmark comparison

Compare against similar schools to yours or schools of your choice.

[Create a benchmark comparison](#)



Progress comparison

Examine your school's spending in relation to progress or compare your school against higher progress schools

[Highest progress schools comparison](#)

[Efficiency metric](#)



Self-assessment dashboard

Formerly the SP/SAAT/SFVS dashboard, see areas where your school is looking healthy or may need to focus on.

[Self-assessment dashboard](#)

Click on Highest progress schools comparison

How highest progress schools benchmarking works



What you'll see on the benchmark pages

This comparison displays schools that are similar in terms of phase, size and number of pupils eligible for Free School Meals (FSM). These schools are achieving good pupil progress with similar or lower levels of per pupil expenditure.

This comparison will help you to identify the similar schools that are achieving the highest pupil progress. By comparing your school's category spending with these schools, you should be able to identify potential areas for change. We also recommend that you contact one or more of these similar schools to determine what more can be learned about how they allocate resource in order to have a greater impact on pupil progress.



Methodology

The benchmarking tool algorithm looks for a group of 50 schools which are similar to the school in question based on:

- **Phase** (e.g. primary, secondary etc)
- **Location** (schools in London and grouped together, schools outside of London are grouped together)
- **Number of pupils** (includes schools with pupil numbers 30 +20% higher and lower than the school in question)
- **Percentage of pupils eligible for FSM** (includes schools with FSM pupil percentages 2 +10% higher and lower than the school in question)
- **Per pupil expenditure** (includes schools with similar or lower per pupil funding)

If less than 50 schools are found, the number of pupils, percentage of FSM pupils and per pupil expenditure fields are widened until 50 schools are available.

The schools with the highest per pupil scores are then returned in the comparison below.



Refine the search

If you believe that the schools returned in your comparison aren't as similar to your school as you would like, you can view and change the number of the characteristics chosen. You can also perform a detailed comparison to select from a wide range of comparators to identify those schools that are similar in the characteristics which are most important to you.

[Continue to higher progress school benchmark](#)

Click on continue at the bottom of the explanation page

Showing for **14** schools in your benchmark set: [Full benchmark set](#)

[Home](#) > [The Benchmark School](#) > [Select comparison](#)

Highest progress schools benchmark

Compare **[School Name]** to schools with the highest progress. [Set comparison](#)

[View benchmark set](#)

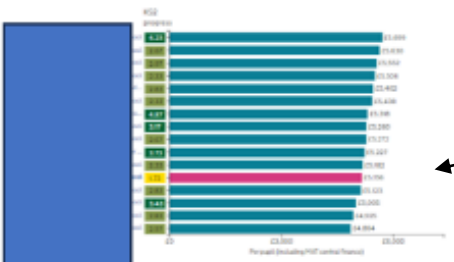
[Download data](#) [Download page](#) [Print page](#) [Share or save benchmark](#)

Expenditure [Income](#) [Balance](#) [Workforce](#) [Your charts](#) [Comparison schools](#)

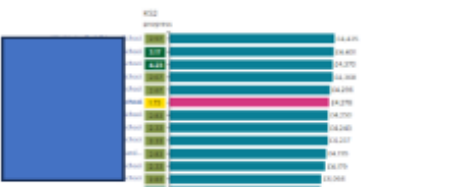
Show grouping: Show value: Total finance:

The data below is from the latest year available. For maintained schools this is 2021-2022, academies from 2020/2021. [View all tables](#)

Total expenditure



Staff total



Similarly, to above, your school will appear in pink alongside the comparator schools with the values on the right and KS2 progress scores

Learning from Others

You may contact other schools to find out why their costs differ. The school's details including the telephone number are recorded against each school, for access just click into the school name.

Other Options

You can download all the data for the schools included in your charts into CSV format and then save in Excel. You can then scrutinise data freely in the usual way.

Top Tips

Don't seek perfect comparability – exact matches are impossible to find. Your school is unique!

Ensure your Governing Body are discussing comparisons at least annually as part of SFVS requirements.

Don't try and benchmark too much at once. Focus on one or maybe two areas.

Don't assume benchmarking will always identify gaps. You may find the results show that your school's costs are very similar to comparator schools. You may draw reassurance from this.

Work with you Head teacher in reviewing benchmarking data.

Do not waste time on areas where there is little scope for improvement. Focus on areas where you are at the lower or upper extremes of the data.

Help

Select '?' where you see the symbol to provide key explanations.

For details of which ledger codes are linked to which CFR code please see our 'Coding lists for FMS' on the LEAP site. Go to Guidance > Coding lists for FMS. Information as to what is recorded under each CFR heading can be found in the following DfE link:

<https://www.gov.uk/guidance/consistent-financial-reporting-framework-cfr>

For further assistance please contact your schools finance link officer.

August 2023
Schools Finance Team