

CUMBRIAN SCHOOLS FORUM – SCHOOLS’ BUDGET WORKING GROUP

Notes of the Schools’ Budget Working Group held on Tuesday 4 May 2004 at Newton Rigg, Penrith.

Present: Mr R Alston (Foundation Secondary), Mr G Frost (Representing Mrs R Denby, Small Primary Schools), Mr C Rafferty (Allerdale Primary), Mr A Rutter (Teacher Associations), Mr N Shaw (Representing Mr D Clark, Labour Group), Mr A Hodge (LEA), Mr G Wilson (LEA), Mrs N Shiels (LEA) was also present.

Apologies: Mr D Clarke, Mrs R Denby, Mr R Rodgers

1. <u>Chairman for Meeting</u>	<u>Action</u>
In the absence of Mr R Rogers, Chair of the Working Group, Mr A Rutter was appointed as acting Chair for the meeting.	
2. <u>Attendance</u> Attendance at the meeting was again very low. Those present expressed concern and discussed what, if any, action should be taken whilst it was accepted that colleagues were busy and attended a number of other meetings. It was agreed that the Chair of the Schools Forum, R Alston, would write to all those members of the Budget Working Group that had not attended.	NS/RA
3. <u>Notes of Meeting on 9 March 2004</u> The notes of the meeting of the Schools’ Budget Working Group held on 9 March 2004 were agreed as an accurate record.	
4. <u>Matters Arising</u> i) <u>Supply List</u> – was progressing. Schools would receive an excel spreadsheet via e-mail. This would enable them to search on specific categories ii) <u>Present</u> – It was suggested that in future notes of meetings the constituency represented should be shown, as well as the names of the members present. This would help, in particular, any substitutes that attended meetings. Future notes of all working group meetings would reflect this request. iii) <u>Benchmarking and Pupil Led Funding</u> – appeared later on the agenda. iv) <u>Longer Term Budget Planning/Surpluses</u> – a report would be brought to the School Forum on 24 May regarding consultation on changes to the approved scheme.	NS AH
5. <u>Financial Benchmarking</u> The working group considered a report that summarised the initial work on benchmarking financial information for schools. It was felt that making more effective benchmarking data available to schools would enable both schools and the LEA to consider the appropriate use of resources in schools. Consideration could also be given to the appropriate and sufficient levels of funding that was made available to schools. The report gave an indication of the type of data that would be included. It was intended that the benchmarking data would consist of the following:-	AH

- all budget allocations, including S52, SSG, Standards Fund, Social Inclusion, etc;
- proportion of SEN funding;
- social deprivation indices including free school meals and other data;
- proportion of social deprivation funding available to each school;
- income generated by schools;
- budget balances – deficits and surpluses;
- school size;
- CFR data including spend per pupil on various categories;
- FTE teachers;
- Contact and non-contact time for teaching staff.

Action

During the debate N Shaw asked whether it would be possible to include independent schools in the benchmarking data and whilst the group felt that it would be quite interesting to include the independent sector, it would probably not be possible to access the information. The group also felt that it would be necessary to categorise schools dependent on their size.

It was agreed that the benchmarking work should continue and a further report be produced for consideration by the Budget Working Group at a meeting to be held late June/early July. The final data would then be published in September.

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6. Non – Pupil – Led Funding

A report which summarised the components in Cumbria’s Fair Funding Formula and looked at alternatives was considered by the Working Group. The group were invited to express its views as to the increasing or decreasing the proportion of pupil-led funding in the Fair Funding Formula. Regulations stated that the proportion of pupil-led funding for primary and secondary schools must be at least 75%. In Cumbria this figure was 91.5% and in the last few years there had been a shift towards pupil-led funding with the removal of factors for building and grounds areas. Informal contacts suggested that Cumbria had a higher funding level per pupil than other LEAs.

In discussing the issues R Alston pointed out that funding can very quickly lose transparency. Any change to funding would produce winners/losers and shift resources between sectors. A change could also help to protect small schools and the group discussed the notion of the minimum size for a school. In a County such as Cumbria there was an acceptance that there would be small schools, but there was also a need to tackle issues such as surplus places. The School Size group would be considering minimum size/funding issues at its meeting on 5 May 2004.

The group also discussed fluctuations in pupil numbers and the effect on school budgets however it was felt that changing from funding on estimated pupil numbers with consequential adjustments the following year would reduce this effect. A recommendation would be made to the Schools Forum on 24 May 2004 which would suggest a change to using actual pupil numbers based on the January numbers each year.

There was also some discussion regarding longer term planning. The majority of schools did not plan ahead, this happened nationally, not just in Cumbria. The group felt that the way forward was to move toward three year budget setting. It was agreed that a further report regarding the changes that would be required to move towards three year budget planning would be prepared for consideration by the Schools Forum on 24 May 2004.

Action

G Frost requested that the notes of the meeting record that colleagues in small schools had expressed strong feelings regarding the disparity between the primary and secondary sector.

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7. Any Other Business

During the debate regarding financial benchmarking the payment of rates had been mentioned. N Shaw requested some clarification. A Hodge explained that for all schools, the LEA paid the proportion of the rates bill that was required.

8. Date of Next Meeting

It was agreed that the next meeting of the Budget Working Group would be held on Thursday 8 July 2004 at 9.30am. The venue would be Penrith or Tebay and would be confirmed later.

**Nicola Shiels
Education Directorate
17 May 2004**