

CUMBRIAN SCHOOLS FORUM – SCHOOLS’ BUDGET WORKING GROUP

Notes of the Schools’ Budget Working Group held on Thursday 8 July 2004 at the Westmorland Hotel, Tebay.

Present: Mr S Bowditch (Special Schools), Mr T Hobson (Eden Secondary), Mr C Rafferty (Allerdale Primary), Mr R Rodgers (Eden Primary), Mr A Rutter (Teacher Associations), Mr D Southward (CCC – Labour Group), Mrs J Stocker (Cabinet Member for Education), Mr B Thomas (Cumbria Early Years Partnership and representing Mr I Davies, Diocesan Authorities), Mr A Hodge (LEA) and Mrs N Shiels (LEA) was also present.

Apologies: Mr R Alston, Mr D Johnston, Mrs M Pickthall.

1. Notes of the Meeting Held on 4 May 2004

Action

The notes of the meeting of the Schools’ Budget Working Group held on 4 May 2004 were agreed as an accurate record.

2. Matters Arising

- i) Supply List – was expected to be in schools in September 2004.
- ii) Longer Term Budget Planning – the group welcomed longer term budget planning which would also be tied into schools not building up excessive surpluses or deficits. There was some discussion regarding those “exceptional” circumstances when schools did hold a large surplus or deficit. It was however felt that the introduction and development of longer term budget planning would actually help a school to justify a planned surplus or deficit.
- iii) Formula – the formula was constantly being refined, but there continued to be some concerns regarding the formula. Many of the concerns were largely historical and could contribute towards the existence of some of the surplus or deficit budgets in schools. This was an issue which was regularly debated. The Chair suggested that it might be necessary for this working group or the Forum, as a whole, to consider possible changes that could be made to address some of the issues.
- iv) Non – Pupil Led Funding – the Schools Forum, at its meeting on 24 May 2004, had noted that the Budget Working Group had agreed that it would not be progressive to reduce the level of pupil – led funding.

3. Financial Benchmarking

Following meetings of the Budget Working Group held on 9 March and 4 May 2004 initial work had begun to produce financial benchmarking information for schools. It was intended that data would be available to schools during the Autumn Term 2004. A “dummy” School Benchmarking Summary was tabled at the meeting. This gave an indication of the type of information that could be provided to schools. Included initially was information relating to two financial years – 2003/04, similar to consistent financial reporting and, 2004/05. This example was one way in which this type of information could be presented, but any suggestions from the group would be welcomed.

In general, it was thought that financial benchmarking information would be useful, but it needed to be developed further. These were some concerns expressed including:

- pupil teacher ratios and the possibility that information could be “hidden”;
- income raised that contributed towards school funds should be included;
- “good will” of staff and worries that this could be lost.

The group also thought that it would be important to establish school groupings in order to make useful comparisons. Different ways of grouping schools were discussed including:

- primary, secondary and special;
- primary school split - less than 50;
 - 50 – 100;
 - then up in 100's.(half of Cumbria's primary schools have less than 50 pupils)
- infant, junior, primary – issues;
- secondary schools - with sixth form;
 - without sixth form;(what was a small secondary school?)
- special schools – comparison with special schools in other authorities or with Cumbrian primaries?

A Hodge confirmed that income generated by schools would be included in the information. The group accepted that however the groupings were made up there would always be anomalies. When the groupings were finally determined, the school group would be added to the benchmarking information.

AH

4. Nursery Schools Formula

A paper intended to inform discussion regarding nursery school funding had been prepared for the group. On 1 April 2004 nursery schools had received full budget delegation. Following a countywide consultation exercise in the Autumn term 2003, and taking account of the views of the Schools Forum, the current fair funding formula had been applied to Nursery Schools. As this had resulted in a decrease in funding for the six nursery schools, compared with previous expenditure, a lump sum protection factor had been allocated to each school to bring them back up to their historic funding levels. It had been agreed that this position would be reviewed for 2005/06. There were a number of possibilities for discussion including:-

- continue to fund nursery schools at historical levels using the lump sum method;
- move to a place – led funding basis, which guaranteed nursery schools a certain amount of income;
- increase the AWPU component (and others) for nursery schools (but not nursery classes in primary schools) to reflect the historic funding levels;

- move to the same formula as schools and investigate the effect on individual nurseries.

It was also reported that there was now a nursery representative on the Schools Forum, unfortunately, she had been unable to attend this meeting.

The provision of nursery schools across Cumbria was historical rather than strategic and this type of provision was more costly than other types of provision, eg designated nursery class. Also, there was now a core of emerging Childrens Centres that were focussed on existing nursery schools. Shortly after it's establishment, the Early Years Partnership (EYP) had considered funding in detail and had concluded that it was not practicable to fund all children equally whatever the type of provision.

In order to progress the matter it was agreed that a small sub group would be established comprising four or five members. The membership would be drawn from the EYP and the Schools Forum. B Thomas agreed to establish the group and draw up terms of reference. The group would make proposals on how to fund nursery schools, together with background information regarding the issues. S Bowditch would also be involved. The group would aim to report back to the Budget Working Group at their next meeting on 13 October 2004

BT/AH/SB

5. AWPU Values

A paper illustrating the differing levels of AWPU in different authorities was circulated to the group for information and interest. A number of schools had requested a review of AWPU levels. The group welcomed the information and S Bowditch requested that a similar comparison with special schools in the identified authorities be provided.

AH

6. Social Inclusion Funding

At the meeting of the Schools Forum on 25 May 2004 it had been recommended that the SEN, Access and Inclusion, Social Deprivation Working Group re-examine the arrangements, and explore alternative arrangements, for allocating the totality of resources for children with emotional, social and behavioural difficulties. The CASH Access and Inclusion group were also to be invited to express a view regarding the issue.

This was a difficult issue which kept being referred back to either the Budget or SEN group for further consideration. At the present time the formula was based largely on FSM. This was primarily an issue that affected secondary schools and there were growing concerns regarding the current arrangements. There were some examples of good practice, eg West Cumbria and Carlisle. Schools in the Eden area were also beginning to make some progress despite perceptions that this was not a "rural" problem. The group also felt that increasing instances of bad behaviour amongst younger children was likely to lead to this problem growing.

In an attempt to move the issue forward it was agreed that the Chair of the Budget Working Group would write to CASH and S Goodall to determine whether it would be possible to propose a recommendation to the Schools Forum on 17 November 2004. If it was at all possible it would be beneficial for the SEN Working Group (7 October) and the Budget Working Group (13 October) to debate the proposals prior to the meeting of the Forum on 17 November 2004.

RR/AH

	<u>Action</u>
<p>7. <u>Trade Union Convener</u></p> <p>On 19 November 2003 the Schools Forum had agreed that support to non-teaching unions should be on the same basis as that to teacher unions, ie that union representatives should be accorded reasonable time-off with pay while undertaking trade union duties and that employing schools should be reimbursed, from central funds, additional costs incurred. At the meeting of the Schools Forum held on 24 May 2004, it had been suggested that it may be appropriate for one of the sub groups of the Forum, to revisit this issue. This suggestion had been made in response to dissatisfaction expressed by Unison at not being properly able to represent their members in schools. It was reported that Unison operated differently to the teaching associations and it was not possible to change working practices. The group felt that the original decision should stand, however, it would be useful for a representative from Unison could explain their working practices and how they differed from those of the teaching associations.</p> <p>It was therefore agreed that a meeting to discuss how the working practices of Unison and teaching associations differed would be held before the next meeting of this group on 13 October 2004.</p>	AR/AH/DJ
<p>8. <u>CAPITA Contract</u></p> <p>The Chair and Vice Chair of the Schools Forum had requested that the contract with CAPITA be initially discussed by the Budget Working Group. CAPITA had negotiated the contract with the LEA, and on the back of that contract, had negotiated separate arrangements with schools. The LEA contract was for seven years, contracts with schools were for three. There were concerns that, should CAPITA's contract with the LEA be extended then that would have an automatic effect on schools' contracts. Conway Stewart had been involved in brokering the original contract with CAPITA on behalf of schools. Preliminary discussions had already begun regarding the renewal of contracts. It was important that the Schools Forum be fully involved in any discussions and re-negotiations.</p> <p>It was therefore agreed that the Chair of the Budget Working Group should represent the Schools Forum in these discussions. A Hodge would liaise between Conway Stewart and the Chair.</p> <p>It was also reported that many of the diocesan authorities offered a similar range of services to church schools as those available from CAPITA. Anton Hodge would discuss this further with the Diocese.</p>	AH AH/BT
<p>9. <u>Any Other Business</u></p> <p>At BBC news release "schools funding change looming" was circulated. Further details would follow as they became available.</p>	AH
<p>10. <u>Date of Next Meeting</u></p> <p>The next meeting of the Budget Working Group would be held on Wednesday 13 October 2004 at Newton Rigg, Penrith at 9.30am</p>	NS

**Nicola Shiels
Education Directorate
September 2004**