

THE CUMBRIAN SCHOOLS FORUM

MINUTES OF THE MEETING HELD ON 7 FEBRUARY 2006

PRESENT

Mrs J Baskerville (Carlisle Primary – representing Mrs I Roberts-Green)
Mrs N Bates (Community and Voluntary Controlled Primary Schools)
Mr A Bryant (Cumbria Governors Council - Observer)
Mrs J Blacklock (Small Schools)
Mr S Bowditch (Special Schools)
Mr C Brooksbank (South Lakeland Primary)
Mr C Clarke (South Lakeland Secondary)
Mrs T Eyre (Copeland Primary)
Mr C Kirkup (Eden Secondary)
Mr K Little (CCC, Labour Group – Observer)
Mrs J Mansfield (Community Secondary Governor)
Mrs J Marshall (Barrow Primary)
Mrs L Moffatt (Barrow Secondary)
Mr M Murphy (Carlisle Secondary)
Mr C Peaple (VA Secondary)
Mrs M Pickthall (LSC – Observer)
Mr C Rafferty (Allerdale Primary)
Mrs J Richardson (Allerdale Secondary)
Mr R Rogers (Eden Primary)
Mr A Rutter (Teachers' Professional Associations)
Mr G Seward (Foundation Primary Governor)
Mr M Smith (Copeland Secondary)
Mr E Tumelty (RC Diocese)

Officers in attendance:

Mr A Hodge	(Education Finance)
Mr D Johnston	(Education)
Mr G Wilson	(Education Finance)
Mrs N Shiels	(Education)

1. **MEMBERSHIP**

Julie Richardson, headteacher, Beacon Hill School, representing Allerdale Secondary Schools and Clive Peple, headteacher, Cartmel Priory School, representing VA Secondary Schools were welcomed to their first meeting of the Forum.

Judith Baskerville, headteacher, Norman Street Primary School, representing Irene Roberts-Green, Carlisle Primary Schools was also welcomed.

2. **APOLOGIES FOR ABSENCE**

Apologies for absence were received from:-

Mrs E Barraclough

Mr P Chappelhow

Ms J Farebrother

Canon D Jenkins

Mrs I Roberts-Green (represented by Mrs J Baskerville)

3. **SCHOOL BALANCES**

There had been recent reports in both local and national media relating to schools with deficit budgets. The latest of these had appeared in the News and Star and had listed schools with deficit budgets. The list was inaccurate and had included schools that were not in deficit at all, or indicated a higher deficit than was actually the case. Schools that had been affected by the inaccurate reports had expressed their concern. Officers apologised to any school that had been affected by such reports and confirmed that the DfES had provided the information to the News and Star.

It was likely that other local newspapers across the county could publish similar reports.

4. **MINUTES OF THE MEETING HELD ON 11 JANUARY 2006**

Subject to an amendment under item 5, matters arising, that officers would undertake to provide a written response to a query raised by the special schools representative relating to an alleged reduction of the special schools standards grant, the minutes of the meeting of the Schools' Forum held on 11 January 2006 were agreed as an accurate record.

5. **MATTERS ARISING**

Special Schools Grant: Officers undertook to provide a written response to the special schools representative regarding his concerns relating to the level of the special schools standards grant.

Application of MFG to Special Schools: The special schools representative queried whether MFG was applied to the special schools in Cumbria. He was concerned that the five special schools were not going to be funded according to government recommendations for the next two years. There was an item later on the agenda relating specifically to Special Educational Needs that officers felt would address this issue.

There were no other matters arising from the minutes.

6. PERFORMANCE RELATED PAY

At the meeting held on 11 January 2006, the Schools' Forum had agreed the principle that it was necessary to change from a targeted grant to a formula budget. There had been a long discussion during which a number of concerns had been expressed about the formula that had been proposed. As a result, the Forum had asked that options be available for the next meeting that replicated the current arrangements as far as possible and moved towards incorporating the former funding in the schools funding formula.

The Forum considered a further report that looked at the options available on funding for performance related pay from a targeted grant to the Dedicated Schools Budget (DSG). The report suggested a possible method of allocating the former grant sum and the Forum were asked to express their views regarding the proposed method of allocation and the period, if any for the transition to full formula funding of the former grant.

Once again, the issue was debated at length. There continued to be concerns about the impact of the proposed changes on some schools. It was, however, accepted that changes were necessary, though a number of Forum members that felt that further modelling work should be undertaken before the transition period began.

The Forum recommended that:

- i) **the period of transition should be delayed for one year to 2007/08;**
- ii) **the former grant funding should be allocated as outlined in paragraph 3.13 of the report; and**
- iii) **the Budget Working Group should consider the modelling work that had been requested and report back to the meeting of the Schools' Forum that would be held in May 2006.**

This would be treated as a central item in the Schools Budget. It was however likely that there would be a breach of the Central Expenditure Limit. The Schools' Forum would permit the breach.

7. MULTI-YEAR BUDGETS

A report was presented that sought the views of the Forum on the proposed process for the first multi-year budget period (2006-07 and 2007-08).

Three year budgeting for schools had been introduced in 2005. In March of that year each school had been sent a final budget for 2005-06 together with indicative allocations for 2006-07 and 2007-08. The indicative allocations had been based on pupil numbers, submitted by schools and had been stated at 2005-06 prices. As part of the new funding settlement for schools, Local Authorities (LA) and schools would now be given two year budgets for 2006-07 and 2007-08. A three year budget period would then follow. After that, the third year of each multi year period would become the first year of the new budget period.

Non AWPU Data Changes – Various formula values would be set at the start of each multi-year period but there would be data changes for pupil numbers. The Forum were asked to determine which factors in the formula, other than AWPU should be updated for data changes.

The Schools' Forum agreed that the factors in the formula, other than AWPU, relating to SEN, social deprivation, school meals, rates and NQTs should be updated to incorporate data changes. For the factor relating to lump sums, there would be no change except where schools were amalgamated.

The LA felt that the movement to a two year budget then a one year budget in 2007-08 was a backwards step and therefore intended to continue to produce indicative budgets using the same principles as the current three year indicative budgets.

National legislation now required that funding for schools be based on actual January numbers rather than the previous 5/12ths and 7/12ths split. However, for nursery classes and schools, it was possible to determine a number that represented the number of pupils that would be admitted in the summer term and take this number into account in the formula. The argument against doing this was that overall it would provide additional funding to the nursery sector. A January count would on the whole present the correct balance, however, there would be individual cases where a nursery had stable numbers in September and January and then were much higher number in April. One possibility would be to fund on the 5/12ths + 7/12ths, but ringfence the amount paid in total on the nursery AWPU, thus not disadvantaging other sectors.

The Schools' Forum then recommended the following:-

- i) **Single Pupil Count – Nursery classes should be funded base on 5/12 and 7/12 but the amount that was paid in total on the nursery AWPU should be ring fenced so as not to disadvantage other sectors.**
- ii) **Three Year Indicative Budgets – The Local Authority should produce 3-year indicative budgets for 2008-09 (in March 2006) and 2008-09 and 2009-10 (in March 2007). These would be produced using the same principles as the current 3 year indicative budgets.**

8. SCHOOLS BUDGET – CENTRAL EXPENDITURE

The views of the Forum were sought on a proposed change to the Scheme for Funding Schools to allow the cost in certain circumstances, of dismissals, premature retirements and resignation to be charged to the Schools Budget. The Forum had considered this issue at their meeting on 11 January and had requested some further details as to how the scheme would operate.

The Forum recommended that the Scheme for Funding Schools should be amended to allow expenditure, “In respect of the dismissal or premature retirement of, or for the purpose of securing the resignation of any person employed in a maintained school where the revenue savings that will be achieved are equal to or greater than the costs incurred”, to be charged to the Schools Budget where they arise following the closure, merger or amalgamation of schools.

9. SCHOOLS FUNDING – ADDITIONAL RESPONSIBILITIES

At the meeting of the Schools' Forum held on 11 January 2006 a report had been considered that identified specific additional funding included in the DSG, and suggested how it might be allocated to schools through the formula. The additional funds were specifically for government priorities. The report had set out the priorities together with the manner in which the Government had determined the allocation to the Authority. The Forum had discussed the report at length and had agreed the principle of ensuring that of the total available funding, the primary and nursery sectors receive an increase of 0.6% greater than the secondary sector in order to reflect the additional pressure arising from Workforce Reform. Further information relating to the allocation of funding for personalised learning had also been requested.

A further report was presented that sought the views of the Forum as to how the extra funding that the Government had included in the DSG for both 2006/07 and 2007/08, to meet the costs arising from additional responsibilities, should be allocated. A proposed method of allocation was suggested in the report.

There was a further long discussion about the proposed method of allocation and the level of funding for deprivation that was allocated in Cumbria. It was stressed that deprivation was a particular priority of the Government and the Forum would, in future, receive further reports on the issue. Many members of the Forum continued to have concerns about the proposed method of allocation. There was a view that there should be more comparison made with other LAs and also that if more information about the different funding streams were available Forum members would have a clearer picture before agreeing recommendations.

It was not possible to achieve a consensus view on the allocation of additional funding to meet the government priorities identified in the report.

However, following a close vote, **the Forum recommended that the additional funding should be allocated to replicate, as far as possible, the basis of the allocation that the Secretary of State had used in distributing the funding to local authorities and as detailed in paragraph 5.0 of the report.**

Following the vote, concern was raised about the whole issue of deprivation and the closeness of the vote. It was suggested that one of the sub-groups consider the issue in detail.

10. SPECIAL EDUCATIONAL NEEDS

The Forum considered a report on the link between mainstream education and special educational needs.

The report had been produced to respond to a question that had been raised at the meeting of the Forum on 11 January 2006 regarding the proposed increase in funding for statements of SEN and the increase in mainstream school budgets. It was recognised that this was a difficult area and the report recommended that the Schools' Forum ask the Budget Working Group to consider the relationship between the increase in funding for special educational needs and mainstream education. The group would consider issues that had been raised

and research whether or not it was possible to establish a link between mainstream and SEN funding.

In the past, the special schools representative had consistently expressed his concern at the levels of funding that were available to the special schools and he reaffirmed these concerns. He then requested the opportunity to discuss the report fully with the heads of the other special schools in Cumbria. They could then collectively prepare a written response to the report.

The Forum recommended that the SEN, Access and Inclusion Working Group should consider this matter further, taking into account the response of the five special school heads.

11. EMPLOYEE HELPLINE

A report that brought to the attention of the Forum the availability of helplines for school based staff was presented.

A number of employers provided support helplines for their staff where problems could be aired and assistance sought by employees in confidence.

Currently, all council employees with the exception of non-teaching staff had access to a telephone helpline service either from the County Council's own helpline or from the Teacher Support Line.

The Council was in the process of re-tendering for a helpline service for all its 'non-school' but, subject to the views of the Forum, non-teaching staff could be included in the contract.

The Forum felt that all staff should have access to a helpline and therefore **recommended that an employee helpline should be made available for all non-teaching school based staff.**

12. SCHOOLS BUDGET 2006-07 AND 2007-08

The Forum considered a report that sought their views on the proposed allocation of the DSG for 2006-2007.

The overall increase in the Schools Budget and the Dedicated Schools Grant was estimated to be 5.3%. From 1 April 2006 the Local Authority would receive funding for the Schools Budget (both delegated and centrally retained) through a Dedicated Schools Grant. This grant would be pupil related and the Secretary of State had indicated that the increase for 2006-07 would be 6.8% per pupil. However, this included extra funding of approximately 1.8% per pupil for various additional "top ups" e.g. personalised learning. The final amount payable to the Authority would not be known until May and would be determined by the actual pupil numbers returned to the DfES in the PLASC data in January.

The report also responded to some of the queries that had been raised at the meeting of the Forum on 11 January relating to increased expenditure on PRUs, non-maintained special schools, behaviour support services and combined services. In 2006-07 and following there would be a budget of £380k for Combined Services, which would be focused on the most vulnerable pupils in the authority, combining educational, social and/or therapeutic provision. Further details would be made available to the Forum or one of the Working

Groups during the year to show how such expenditure would provide a proportionate educational benefit to schools.

Despite the additional information, there remained a number of queries that would more appropriately be dealt with by A+I colleagues. It was therefore suggested that the SEN, Access and Inclusion, Social Deprivation Working Group be requested to look at these issues in more detail, with an A+I officer being invited to attend the meeting in order to respond to any queries.

In the meantime, a written explanation, for all Schools' Forum members, of the pressures that had been identified in the appendix was requested as soon as possible.

The Forum then noted the proposed allocation of the DSG for 2006-07 as set out in the appendix to the report.

13. SURE START FUNDING 2006-2008

A report that provided details of funding for Sure Start for the next two financial years and the Local Authority's intended use of the General Sure Start Grant was circulated for information.

The report was intended to inform Forum members in advance of the next meeting which would be held on 28 March 2006. The Forum would then have the opportunity to feedback any comments to the Local Authority.

The Forum noted the report but requested that an officer from Sure Start be available to attend the next meeting of the Forum in order to respond to any questions that might arise.

14. MEETING SCHEDULE 2006/07

A proposed schedule of dates of meetings of the Schools' Forum during 2006-07 was considered and agreed.

The Schools' Forum would therefore meet on the following dates during 2006/07 :-

Tuesday, 16 May 2006
Tuesday, 19 September 2006
Tuesday, 21 November 2006
Tuesday, 23 January 2007
Tuesday, 6 February 2007 (PROVISIONAL)
Tuesday, 27 March 2007

All meetings would begin at 9.30am and a light lunch would be provided. Venues for the meetings would be confirmed at a later date as would dates for the working group meetings.

15. WORKING GROUPS - MEMBERSHIP

At the meeting of the Schools' Forum held on 12 January 2006 it had been agreed that the working groups would continue as they had been previously:

- i) SEN, Social Deprivation, Access and Inclusion
- ii) School Size
- iii) School Budgets

Members had been invited to indicate which of the working groups they would be interested in joining and a list of the members that were interested in participating in each group had been prepared. The lists were circulated to those members that had not already indicated a preference during the meeting.

It was reported that schools bursars were interested in the possibility of being co-opted onto the working groups when appropriate.

It was also suggested that it might be helpful to the special school representative if one of the other five heads were invited to attend working group meetings.

Membership of the Working Groups would be finalised and circulated to Forum members.

16. ANY OTHER BUSINESS

Standards Fund Grant – The South Lakeland secondary representative asked if there was any information available regarding the likely level of standards fund grant. Officers explained that, as well as the usual summary of recommendations, a summary of the impact on schools budgets, of the agreed changes, would be produced and circulated to all schools as soon as possible after the meeting.

Children and Young People’s Scrutiny Panel (CYPSP) – The CYPSP had asked to receive, for information only, the minutes of Schools’ Forum meetings. As there were no objections, it was agreed that the minutes would be made available to CYPSP. The panel would also welcome a presentation on the work of the Forum, to a future meeting.

Children’s Services Directorate – Reorganisation of Senior Officers – Cabinet were discussing a report that set out proposals for developments in children’s services management on 7 February 2006.

Corporate Director – Children’s Services – The Chair would write to extend a standing invitation to the Corporate Director – Children’s Services, or her representative, to attend future meetings of the Schools’ Forum.

PR/NJS

16 March 2006