

CUMBRIAN SCHOOLS FORUM – SCHOOLS’ BUDGET WORKING GROUP

Notes of the meeting of the Schools’ Budget Working Group held on Tuesday 13 September 2005 at Newton Rigg, Penrith

Present: Mr R Alston, (Foundation Secondary), Mrs E Barraclough (CCC – Liberal Democrat Group), Mrs J Blacklock (Community and Voluntary Controlled Primary Schools), Mr S Bowditch (Special Schools), Mr P Chapplehow (CCC Conservative Group), Ms J Farebrother (Nursery Schools), Mr K Little (CCC – Labour Group), Mr C Rafferty (Allerdale Primary), Mr R Rogers (Eden Primary and Chair of Group), (Mr A Rutter (Teacher Associations), Mr B Thomas (CEYDCP), Mr A Hodge (LEA), Mr D Johnston (LEA), Mr H Slater (LEA) and Ms N Shiels (LEA).

Apologies: Mr S Halfpenny, Mr T Hobson

The group noted apologies from Shaun Halfpenny who was absent from school following an illness. Members of the group asked that their good wishes for his recovery be recorded.

1. Additional Business

Action

Two additional papers had been brought to the meeting, from the Cumbria Nursery Schools Network and a submission from the five Special School Headteachers. The group considered whether or not it was appropriate to consider these two items at this late stage.

Cumbria Nursery Schools Network – this was a letter containing the key points of a report that the network hoped to present to the EYDCP for their consideration. The Nursery schools representative explained that it may be timely for the Budget Working Group to note the details that the report contained on nursery admissions, as part of the current review of AWPU values used in the allocation formula to schools.

There was a view that the recommendations contained in the letter had implications for policy change. As such these were matters for CCC members to consider rather than the Schools’ Forum and it was therefore judged to be inappropriate to discuss this paper at this time. The Nursery schools representative was happy to follow this advice. She went on to explain that the letter had not yet been submitted to any group and she had brought it to the group for their information.

Submission from Special School Headteachers – the submission related directly to the budget review process and it was agreed that the content of the submission should be considered whilst considering the model. The group also agreed that the submission should be attached for information as an appendix to the notes of the meeting but that they would not be bound by the terms of the sentence at the end of the first paragraph relating to the reduction of special school budgets.

2. Notes of the Meeting held on 10 June 2005

The notes of the meeting of the Schools’ Forum Budget Working Group held on 29 June 2005 were agreed as an accurate record.

3. Matters Arising

At the meeting on 29 June a further meeting of the group had been scheduled for 19 July. It was noted that this meeting had not taken place.

4. Formula Review

On 29 June the Schools’ Budget Working Group had considered an initial report that suggested a methodology for the review of the schools’ delegated funding

formula. A progress report was presented on the research work that had been undertaken to create a model of the minimum budget requirements in order for all schools to provide a statutory education in accordance with the Council's policies. To supplement the report a document containing background information, and examples relating to the research that had been undertaken, was circulated.

This was not the finished article but was work in progress and it was emphasised that the work was not about making savings but looking at the re-allocation of all existing budgets in a transparent way. This was a minimum model spend that started with a minimum cost for a class based around the statutory objectives together with CCC policy. This was then extrapolated out to produce a school cost. The model was intended to be a vehicle for debate.

The model had been based on a number of assumptions that the group were asked to work through one by one to either agree or to make suggestions that could alter the assumptions. It was pointed out that changes to one or more of these assumptions could have implications for others.

As well as any changes that were suggested during the meeting, it was also recommended that a small number of elements be re-worked and brought back to the group. These were :

- SEN Funding
- % of allocation relating to Social Deprivation
- Effects of workforce reform

HS/DJ/
AH

The Chair of the Group stressed the importance of this area of work and that it was vital that all members of the group were clear about all that was to be considered.

1. Class Sizes – class sizes, staff numbers and salaries used in the model were shown in part 3, table 1 of the document that had been circulated. Staffing numbers in the model assumed that classes of older children had more teachers and less support whereas classes of younger children had more support and less teaching staff. This was a model of stated assumption not a model of current practice, a budget framework within which it would be possible to have separate spending models for different sectors.

The Special schools representative expressed some specific concerns relating to statutory obligations to pay staff at levels higher than those that had been assumed in the model. HS explained that there would be a different spending model for special schools but that he had tried to make assumptions that would allow children to transfer across sectors.

Similar concerns were expressed relating to nursery schools and HS agreed to check that the minimum spend in a nursery school could be delivered through the model.

HS

Following a lengthy discussion, the group accepted that this was a theoretical budget model but the specific points made in relation to nursery and, particularly, special schools should be borne in mind.

Concern remained about the level of understanding of the process as a whole. HS offered to meet with small groups or individuals, to explain the process, if it was thought that this would be helpful in disseminating the information to colleagues.

HS

2. Level of Staff – the investment in staffing was broadly the same in all classes for all pupils. This had been covered under (1) above – younger children, fewer teachers and more teaching assistants, older children, more teachers and less teaching assistants. There was some concern that this point was making a policy statement however it was emphasised that this was a budget creation model. Part 3, table 1 of the document gave examples of the total staffing costs for classes at the different key stages. The different amounts for different key

stages were questioned and it was explained that it the logical approach had been to fit with the Formula Spending Share (FSS) as this gave a guide to government expectation regarding expenditure on the particular sectors. This was a difficult area for the group and there were extensive discussions about the equality of costs across the sectors.

It was felt that the model would be more transparent than the present scheme. The model would also help to illustrate how much some schools were subsidised.

Primary colleagues were concerned that the cost of classes in the different sectors would be questioned and that it would be difficult to provide an explanation. AH however felt that once the assumptions upon which the model were agreed then the model would explain itself. Also, given that FSS was the underlying rationale for the different amounts at different key stages, then this should provide a reasonable explanation.

3. Teachers per Class – the model assumed less than one teacher per class because for parts of the school day there would be larger groups or alternative activities, which were not operated in class.
4. Non-classroom Time – there would be a statutory requirement to give every teacher an average of 20% non-classroom time during the school day. For the purpose of the model this had been replaced half by teacher and half by support staff. This point triggered a long debate covering various different points, including some that had already been discussed :
 - the whole workforce agenda.
 - looking at how to get money into schools.
 - view that governing bodies would not accept the model without clear explanations.
 - there were long standing concerns about the current scheme of delegating funds to schools. If proposals resulted in less concerns then was this not the way forward?
 - view that the proposals needed to be close to perfection rather than just a little better than the current system.
 - certain specific areas should be debated eg why have a small schools subsidy?
 - the impact upon the five special schools would be greater than in any of the other sectors.
 - concerns about the allocation of resources over and above minimum budget to bring up to formula spending share. Winners and losers.

Every member of the group had recognised concerns and it was difficult to make progress without total agreement.

5. Reduced Teacher Workload – central government was seeking to reduce teacher workload from 53 hours per week to 37 hours per week. In order to accommodate this, the model contained an additional 0.78 FTE. This ranged from 0.5 FTE to 2.2 FTE. There was no guidance available but an assumption needed to be built into the model.
6. Headteacher Management Time – and administrative time were both at 0.1 in the model. The implication of this could be significant, especially for small schools. Changes to working practices, establishment of federations, more joint working, etc could be considered. It was recognised that this was a politically sensitive area but accepted that there would always need to be small schools in a county such as Cumbria. What was important, though, was to find appropriate ways to underpin these small schools.

7. Midday Supervision – 0.5 hours per day, per class – taken from Scottish legislation.
8. Non-staffing Costs – based on the average out-turn expenditure in 2004/05, adjusted for 2005/06 by an increase of 2%.
9. Single Status – the predicted outcome of single status negotiations would be a reduction in costs for teaching assistants, midday supervisors, kitchen staff, caretakers and cleaners. The model assumed the predicted reduction in cost. This prompted some discussion as it was felt that this reduction should be part of a properly planned policy that would be determined by members.

The group had not made as much progress as they would have liked. In order to complete the process of looking at each of the assumptions, a further meeting was necessary. Timescales meant that the work needed to reach a point where appropriate recommendations could be made to the Schools' Forum and CCC as necessary.

5. Date of Next Meeting

It was, therefore, agreed that the next meeting of the group would be held on Wednesday 28 September 2005, starting at 9.30am. The venue would be confirmed but Newton Rigg would be the preferred venue. In order to progress, it was agreed that the first part of the meeting would look at SEN issues before moving on through the remaining assumptions.

(Post meeting note : the next meeting of the group would now be held on Friday, 30 September at Penrith Rugby Club. The change of date had been notified via e-mail 16 September 2005).

NS

6. Any Other Business

There were no other items of business.

P&R/NJS
27 September 2005

Schools Forum Submission By The Five Special School Headteachers

Special school headteachers agreed to continue to support the process of Budget Review on the understanding that it seeks to accurately reflect the true cost of providing high quality education for pupils with severe learning difficulties in special schools, and does not lead to a reduction in special school budgets.

We believe that the present proposals of a 5% reduction, ranging from 2.17% to 7.99% to the special school's budgets are not workable, and may well contravene the Disability Discrimination Act.

We believe that the evidence we have provided on national special schools, for pupils with severe learning difficulties class sizes show that Cumbria has one of the poorest, if not the poorest, pupil teacher ratio in the country. These proposals of 12 pupils per class, and some of our special schools now have 14, will be unprecedented in the country. DfES document "Statistics in Schools", January 2004 refers.

We do not believe that we are complying with DfES staffing guidelines for pupils with severe learning. Bulletin 11/90 refers.

The five special school headteachers formally request, and agree with the LEA proposal that:

- The financial review is extended to 2008. This will allow discussion and further detailed research.
- We also request that the financial review encompasses all elements of Cumbria's special needs budget, not just the five special schools; and
- The financial review is informed by the HMI document 2276, "Special Educational Needs and Disability, Towards Inclusive Schools".

Steven Bowditch

Special School Representative on Cumbria's Forum, with the full support of the other four special school headteachers

9 September 2005