

# **THE CUMBRIAN SCHOOLS FORUM**

## **MINUTES OF THE MEETING HELD ON 19 September 2006**

### **PRESENT**

**Mr B Abram (Foundation Secondary)**  
**Mrs J Blacklock (Small Schools)**  
**Mr S Bowditch (Special Schools)**  
**Mr C Brooksbank (South Lakeland Primary)**  
**Mr P Chappelhow (Cabinet Member, Children's Services – Observer)**  
**Mr C Clarke (South Lakeland Secondary)**  
**Mrs T Eyre (Copeland Primary)**  
**Ms J Farebrother (Nursery Schools)**  
**Mr C Kirkup (Eden Secondary)**  
**Mr K Little (CCC, Labour Group – Observer)**  
**Miss J Marshall (Barrow Primary)**  
**Mrs L Moffatt (Barrow Secondary)**  
**Mr M Murphy (Carlisle Secondary)**  
**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 B Thomas (CE Diocese)**  
**Mr E Tumelty (RC Diocese)**

### **Officers in attendance:**

**Mr J Swainston (Head of Service – Schools and Learning, Children's Services)**  
**Mr A Hodge (Children's Services Finance)**  
**Mr D Johnston (Children's Services)**  
**Mr H Slater (Children's Services)**  
**Mrs N Shiels (Children's Services)**

## **1. APOLOGIES FOR ABSENCE**

Apologies for absence were received from:-

Mrs E Barraclough  
Mrs J Baskerville  
Mrs N Bates  
Mrs J Mansfield  
Mr D Natrass

## **2. MEMBERSHIP**

Bob Abram, representing Foundation Secondary Schools was welcomed to his first meeting of the Forum. John Swainston, Head of Schools and Learning who would be attending future meetings was also welcomed.

## **3. MINUTES OF THE MEETING HELD ON 20 JUNE 2006**

The minutes of the meeting of the Schools' Forum held on 20 June 2006 were agreed as an accurate record.

## **4. MATTERS ARISING**

- i) Circulation of Agenda and Papers – there was a reminder that the agenda and papers should be circulated to Forum members two weeks in advance of Forum meetings.
- ii) Items Referred to Working Groups for Consideration – the number of items that were discussed by the Forum but were then referred back to one of the working groups for further discussion had increased. In particular, the full Forum often referred items to the Schools' Budget Working Group for more detailed consideration.  
Originally, there had been three sub-groups of the Forum – School Size, SEN, Access and Inclusion and Social Deprivation and Budget. Recently, however, only the Schools' Budget Working Group had been meeting on a regular basis.  
There were some concerns about the membership and operation of the Schools' Budget Working Group. These concerns were noted and would be taken into account when the ongoing work of the Schools' Budget Working Group was discussed later in the agenda.  
The SEN group would continue to meet and the School Size group would meet if, in the future, it was deemed appropriate.

There were no other matters arising from the minutes.

## **5. WORKING GROUP MINUTES**

The Schools' Budget Working Group had met on 4 July and 7 September 2006.

Schools' Budget Working Group: 4 July 2006 – the Schools' Forum received the notes of the meeting on the Schools' Budget Working Group held on 4 July 2006.

Schools' Budget Working Group: 7 September 2006 – the Chair of the group referred to a number of principles of formula funding that the Forum would be asked to consider and endorse in an item later on the agenda.

The Schools' Forum received the notes of the meeting of the Schools' Budget Working Group held on 7 September 2006.

## **6. MODEL OF SCHOOL EXPENDITURE**

The Forum considered a report that described the external pressures, facing schools, which would have an impact upon allocated resources and necessitate changes to the schools formula.

The report was supported by a presentation that covered: -

- The history of the current formula
- How the formula had changed over the years
- Other funding streams eg. school standards grant (SSG), standards fund, meals grant and personalisation
- AWPU values
- Issues such as small schools, class size, special schools, nursery schools and personalisation/deprivation
- Other issues eg. practical curriculum, inclusion, increased delegation, optional delegation and teachers pay grants

The Schools' Budget Working Group had already undertaken extensive work on the model of schools expenditure and had developed a good knowledge and understanding of the issues. However, when the full Forum had considered proposals, it had proved difficult to reach agreement. This had mainly been due to the full Forum being unable to commit the necessary time to develop a similar level of understanding as members of the working group. As a result the process had made very limited progress over a lengthy period of time.

The Forum was therefore asked to agree or amend a list of basic principles and to give a conditional response to a number of examples of critical policy questions that had been identified.

There followed a lengthy debate before the **Schools' Forum agreed the following principles of formula funding:**

- **The formula would allocate a sum together with LA budget equivalent to the total funding for Cumbria set by central government in the DSG.**
- **The formula should reflect the needs of individual children and groups of children.**
- **The formula should be based on the cost of schools providing statutory and contractual requirements.**
- **There should be one formula applied simply, fairly and equitably to all schools throughout Cumbria.**

- **Where a change in the formula led to a shift in funding there would be a transitional period to dampen the impact of change, which would secure practical and professional management of change. (Schools Budget Working Group to recommend length of transition period and level of funding, etc.)**

It was pointed out that the Forum should ensure that there was an appropriate formula in place and that the formula should be reviewed every few years. Having agreed the basic principles, the Forum could now work towards April 2008. A work plan would be established that would take into account the Cabinet dates where final decisions on any changes would be taken. After 2008 the formula should be reviewed again in preparation for April 2011.

The Forum then considered examples of critical policy questions that had been identified. Members were invited to suggest additional questions and amendments before they were issued consultation.

The Forum worked through the list and, following some discussion, **agreed that the list should be reworked before it was issued for consultation.**

**Finally, it was proposed, and seconded, that a report be submitted to a future meeting of the Forum regarding the centrally held element of the Schools Budget.**

## **7. IN-YEAR PUPIL NUMBER CHANGES**

The Forum considered a report that asked for a decision on the funding of pupil number changes in schools after the budget had been allocated.

Funding for delegated school budgets was now based on the January pupil numbers preceding the financial year. These figures were used to determine the entire financial year allocation and there was no pupil adjustment funding or clawback if numbers changed during the financial year.

A number of schools had stated that due to a sudden increase in pupil numbers during the financial year, budget pressures had arisen. At present there was no mechanism to allocate additional funding to schools in this situation, although where the educational provision at any school was jeopardised because of budget pressures, the Local Authority had the facility to make such a payment. Such payments would only be made in isolated and extreme cases.

It was possible for the Authority to retain a larger contingency within the Schools' Budget to make additional funding available to schools where pupil numbers increase beyond a certain level. This could be stated either as a percentage (e.g. 10% of the total) or as a number of pupils (e.g. 10 pupils).

Three options were presented:

- a) To retain funds centrally within the Schools' Budget and to allocate additional funding to schools when they received additional pupils above a certain trigger point
- b) If (a) was agreed, to recommend the level for this trigger point and whether all additional pupils should be funded or only those above the trigger amount
- c) Agree no change to current practice

Following a short discussion, **the Schools' Forum agreed that there should be no change to current practice.**

## **8. BUDGET 2007 AND ONWARDS (COUNTY COUNCIL)**

A report that brought the County Council budget prospects for the year 2007 and onwards to the attention of the Forum was presented. It identified pressures facing the County Council together with the potential reduction in costs following service reviews.

In December 2005 the government had announced a two year Revenue Support Grant settlement covering 2006/07 and 2007/08. This would provide for minor updates in December 2006 and the council tax capping regime would continue with the requirement that increases would be no greater than 5%.

For schools in Cumbria the total increase per pupil was expected to be 6.5% compared to the national increase of 6.7%. While the overall (national) total would increase by 6%, the continuing fall in pupil numbers in Cumbria would result in Cumbria's cash increase being 5.3% (approx). The Secretary of State had estimated that increased costs facing the DSG would arise from teachers' costs, non-teaching, energy and other non-pay. Additional funding would be received for personalisation and practical learning options.

A further major pressure facing the Council was that arising from the likely cost of equal pay claims. At present, it was not possible to identify a final total liability but in preparation, all Directorates had been requested to carry out 'Service Reviews' to identify potential efficiencies.

No decisions would be taken on these reviews until February but it was noted that some of the suggested areas could affect the content of the Schools Budget. Although the aggregate total (and the delegated funds) would not be affected it was possible that there would be a change in the nature of the expenditure and services provided within the non-delegated element. The Council would obtain the views of schools and the Forum to inform its decisions.

During the discussion, concerns were expressed about the potential effect of the equal pay claim. It was stressed that any changes that could have an effect on the Schools Budget would be presented to the Forum for consideration and it had been felt that it would be good practice to bring an update to Schools' Forum at this stage in the process.

Taking into account the pressures that were facing the County Council, members of the Forum requested that indicative budgets for the next period be made available to schools as soon as was practicable in order to inform their planning processes.

**The Schools Forum then noted the budgetary pressures facing both schools and the County Council from 2007/08 onwards and the Councils' actions in preparing for the 2007/08 budget process.**

## **9. PROVISION OF SUPPLY TEACHERS**

A report was presented that sought the views of the Forum on the most appropriate method of providing support to schools in their quest for supply teachers.

In June the Schools' Forum had considered the benefits and costs of the present system for obtaining supply teachers. Before taking a view, the Forum had asked that the Schools' Budget Working Group consider the position in more detail.

Funding had originally been delegated to schools for all supply cover costs and they had then been able to purchase access to a list of available teachers from Capita. Gradually, the number of schools that were purchasing the list from Capita had reduced and this resulted in it becoming uneconomic to continue its production.

The non-availability of the list was then raised at a subsequent Forum and after considering the matter, the Forum requested that the Local Authority enter into a contract with Capita, on behalf of schools, for it to again produce a list. The cost of the list was £30k and it contained 172 names. The Schools' Budget Working Group had felt that there was a 'value for money' issue and so, had requested that a further report setting out possible alternative providers be presented.

The report asked the Forum for its views as to whether or not:

- a) the authority should continue to purchase the production of a supply list
- b) the authority's Learning Support service should extend its current service to include supply teachers.

The report outlined details of how the Local Authority (LA) Learning Support Service could operate an agency service, rather than a supply list, and how this might work. Capita had also provided information that described the current provision of a teachers supply register.

Whilst the report had set out an alternative to the current provision, it would be beneficial if details of set up and ongoing costs could be provided. The Forum, therefore felt that further information and discussion was needed before a decision could be taken to go down the agency route. In addition it was felt that Capita and one other provider should also be offered the opportunity to submit costs for the operation of a similar service to the one that had been outlined by the LA Learning Support Service. The current contract with Capita for the provision of a supply list would last until the end of March 2006.

**The Schools' Forum recommended that before the current contract with Capita ended in March 2007, LA officers should obtain quotes from Capita, LSS and one other provider in respect of the provision of a supply list/agency.**

## **10. ANY OTHER BUSINESS**

- i) KS2 Foreign Languages – The South Lakeland School representative raised a query about £80k additional funding and how it would be allocated to

schools. There appeared to be differing views around the table so officers agreed to investigate and provide a response.

- ii) Increase in Nursery Hours and Weeks – This was raised as it was felt that it was an issue that would need to be taken into account as part of the formula review. The number of weeks had already increased but the increase in hours would be phased in by 2010.
- iii) David Johnston – It was reported that David would be retiring in October so this would be his last meeting of The Forum. The Chair took the opportunity to thank David for all his hard work with the Forum, and otherwise. The Forum, as a whole, wished David a long and happy retirement and Philip Chappelhow added his personal thanks to David for all the support that he had received since joining the County Council more than five years earlier.

PR/NJS  
September 2006