

THE CUMBRIAN SCHOOLS FORUM

MINUTES OF THE MEETING HELD ON 8 May 2007

PRESENT

Mrs N Bates (Community and Voluntary Controlled Primary)
Mrs J Blacklock (Small Schools)
Mr S Bowditch (Special Schools)
Mr C Brooksbank (South Lakeland Primary)
Mr C Bush (Carlisle Secondary)
Mr P Chappelhow (Cabinet Member, Children's Services – Observer)
Mr C Clarke (South Lakeland Secondary)
Mrs T Eyre (Copeland Primary)
Ms J Franklin (School Support Staff Associations)
Mr D Gasgarth (representing Mr G Seward – Foundation Primary)
Mr C Kirkup (Eden Secondary)
Mr K Little (CCC, Labour Group – Observer)
Mrs J Mansfield (Community and Voluntary Controlled Secondary)
Miss J Marshall (Barrow Primary)
Mrs L Moffatt (Barrow Secondary)
Mr D Nattrass (Voluntary Aided Primary)
Mr R Rogers (Eden Primary)
Mr A Rutter (Teachers' Professional Associations)
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)
Ms A Burdess (Children's Services Finance)
Mrs N Shiels (Children's Services)

1. MEMBERSHIP

The Forum welcomed Ms J Franklin who would be representing School Support Staff Associations on the Forum. Mr D Gasgarth, representing Foundation schools as a substitute for Mr G Seward was also welcomed to the meeting.

2. APOLOGIES FOR ABSENCE

Apologies for absence were received from: -

Mr C Rafferty
Mr G Seward
Mr M Smith
Ms M Swann

3. MINUTES OF THE MEETING HELD ON 27 MARCH 2007

The minutes of the meeting of the Schools' Forum held on 27 March 2007 were agreed as an accurate record.

4. MATTERS ARISING

- i) Voluntary Aided Secondary Representative – Mr B Thomas reported that a replacement representative had not yet been secured.
- ii) Contracts Working Group – Performance Indicators had not been circulated. It was reported that they would be produced on a quarterly basis and would be presented to the next meeting of the Contracts Working Group in June.
- iii) Children's Services HR Manager (Schools) – Gillian Martin had recently been appointed as HR Manager with responsibility for schools, she would take up her post shortly. It was also reported that Diane Llyod-Jones was the new interim School Reorganisation HR Manager.

There were no other matters arising from the minutes.

5. WORKING GROUP MINUTES

There were three Schools' Forum Working Groups, all of which had met since the previous meeting of the Forum on 27 March 2007.

- i) Contracts Working Group – The group had met on 4 May 2007. Stephen Mason had attended the meeting to present a definitive paper regarding CRB, safeguarding, etc. The paper would be circulated to all schools in the next week with a separate follow up for voluntary staff in schools. There would also be a further update at the next meeting of the Contracts Group. The group had also discussed the provision of a supply list. The quote from Capita that had been reported to the last meeting of the Forum had been to establish a completely new system. This was not what had been intended so

Capita were going to rework the quote and provide a new price that should be substantially reduced.

The next meeting of the Contracts Working Group would begin to consider the new LA specification for the SLA. This process would involve schools. Schools had been asked to indicate areas that should be included. Looking further ahead, it was suggested that the group should look at the school portal and how that was working.

- ii) School Budgets Working Group: The group had met on 18 April 2007 and again immediately before the meeting of the Schools Forum (8 May 2007).

On 18 April the group had continued their work on the review of the formula. They had considered an activity based model in detail, had worked through the basis of the calculation and agreed the staffing and non-staffing costs.

A non-AWPU based funding formula had also been considered briefly. The model would be presented as an alternative to the activity based model but it would be emphasised that it had not been debated to the same extent as the activity based model.

At the meeting of the group held immediately before the Forum it had been agreed that further work was necessary before the group could make any recommendation to the Schools Forum. Further information had been requested and work on the models would continue.

There were also concerns about the school organisation process and how that process would fit with the formula review. Philip Chappelhow had undertaken to raise these concerns as appropriate. An update on the progress of the work undertaken would be issued to schools and LA officers would begin to look at the type of transition arrangements that could be made to support schools through any proposed changes that might be agreed.

The Forum received the notes of the working group meeting held on 18 April 2007.

- iii) SEN, Social Deprivation, Access and Inclusion Working Group: The group had met on 17 April 2007.

On 17 April the group had considered SEN funding and social deprivation and personalisation funding, in particular the method of allocation.

Some of the heads of the five special schools, and representatives from strategically resourced schools had attended the meeting. A lengthy discussion had highlighted that there was an overall lack of understanding regarding the different methods of funding and there was some inconsistency in the statementing process. There was, however, a general view that the favoured approach to SEN funding was pupil led.

With regard to social deprivation funding, the group felt that using FSM as a method of allocation did not properly reflect the position of rural schools. However, they also had concerns about alternatives such as IMD and IDACI. The group had therefore requested that further information be provided, including details of commercial packages that were available such as acorn and mosaic.

Concerns about provision mapping had been reported previously. These were ongoing but it had now been agreed that a small group made up of representatives from TACG and Schools Forum, LA officers and a SENCO would be established to discuss and hopefully resolve the concerns.

The period of notice prior to this meeting of the SEN group had been relatively short. As a result, the Special schools representative on the Forum had been unable to attend and he expressed his concern about the short period of notice.

The Forum received the notes of the SEN, Social Deprivation, Access and Inclusion Working Group held on 18 April 2007.

6. SCHOOL FUNDING FORMULA REVIEW

A report that summarised the work undertaken on the formula review was presented. The report included a summary of the work to date. The formula review had looked at two main types of model: -

- Activity Based Costing approach
- Non Activity Based Costing approach

As well as this, the review had also considered Social Deprivation and SEN.

Funding for Social Deprivation, Personalised Learning and Non Statutory SEN

The Working Group (Social Deprivation, SEN, Access and Inclusion) had been considering the funding currently allocated through the Formula.

The group had been looked in particular at funding for Social Deprivation. Currently this was allocated to schools based on an amount per Eligible Free School Meals (FSM). The group had acknowledged that the use of FSM as a measure of social deprivation may not be the most accurate method because the formula could only take account of the number of pupils who were registered for free meals. This meant that the situation in rural areas might not be properly reflected.

As a result, the group had reviewed the use of FSM as an indicator of deprivation and investigated the use of alternative methods:

- IMD – Index of Multiple Deprivation
- IDACI – Income Deprivation Affecting Children Index

The group looked at the pros and cons of each different method. IMD was a complex factor that took account of the various ways that people could experience deprivation. ICACI identified the proportion of young people (under 16) in an area that were living in deprived families. Both of these methods used old data (2001 census and 2001/02 data from the Department of Work and Pensions).

The group had expressed some concern about the age of the data used but some modelling had been undertaken which illustrated a shift of some resources from urban to rural areas. Whilst the group felt that IDACI was probably a better measure, they were concerned at the potential shift of resources away from some of the most deprived areas.

Information about the commercial packages that were available had also been requested.

Whilst discussing this aspect of the review, it was suggested that a threshold should be incorporated. This could allow funding to be more accurately allocated to those areas of perceived need.

Activity-Based Costing (ABC) Model

The School Budgets Working Group had done a lot of work on an activity-based model.

The ABC model began by attempting to define the costs for a school and groups of children. The School Budgets Working Group had worked hard to agree the group sizes that were applied to the costs in order to build up an Age-Weighted Pupil Unit (AWPU). It was pointed out that these should not necessarily be seen as synonymous with class sizes.

Staffing costs had then been agreed and applied to the various groups.

The process of determining 'appropriate' group sizes and staffing costs had been a lengthy one and had generated extensive debate. It was acknowledged that further discussions were needed. This model would consist of various elements, including AWPU, a management lump sum and an admin lump sum. Other elements such as SEN, social deprivation, school meals etc. would remain as present. Having spoken with other LAs, a number were following a similar type of approach. When the model had been applied the most noticeable shift had been away from secondary.

Non-Activity-Based costing Model (XYZ)

The School Budgets Working Group had also considered a non-activity-based model that looked at the non-AWPU factors and asked which factors should not be allocated with respect to pupil numbers. This model was more of a process of 'tidying' the current formula. The group had spent a limited amount of time on this model and therefore the work was much less advanced.

The meeting of the School Budgets Working Group held immediately before the Forum had considered all the work that had been undertaken to date and how to move forward. The work remained on track to consult with schools within the period set aside in the timetable, however, it was recognised that there were areas that still needed further discussion and the Budget Working group recommended that the work should continue with a view to having a more finalised model available for the meeting of the Forum in July.

The Schools Forum noted the progress that had been made to date on the school funding formula review and requested that: -

- **work on the models continue**
- **schools be updated on the progress of the work, to date**
- **officers began to look at the type of transition arrangements that could be made to support schools through any changes that could be agreed.**

7. SCHOOL FUDING 2008-2011 CONSULTATION

In March, the DfES had published consultation proposals on the school, early years and 14-16 funding arrangements including:

- the distribution of the Dedicated Schools Grant (DSG) to local authorities, covering funding delegated to schools and other provision for pupils.
- refinements to the way local authorities funded schools, ready for the introduction of three-year school budgets from April 2008.
- funding arrangements to support key education reforms:
 - the entitlement to Specialised Diplomas at Key Stage 4
 - the extension to 15 hours and increased flexibility of the free entitlement to early years education and care.

A report was presented that summarised the DfES consultation and listed the consultation questions. The Forum was asked to give their views on the consultation questions in order to formulate a response. Joint responses from the LA and Schools Forum tended to carry a little more weight. The closing date for responses was 1 June 2007.

The Forum worked through each of the questions to agree a response.

It was agreed that a copy of the final completed response would be circulated to all member of the Schools Forum.

8. SINGLE STATUS AND EQUAL PAY CLAIMS

At the meeting of the Forum held on 27 March 2007 a report that set out the possible implications, for schools, of the single status employment contract arrangements for non-teaching staff in schools had been considered. The Forum had discussed this at length and felt that further work reflecting the likely cost to schools was needed. The Forum had however, recommended that the principle of allocating, to those schools involved, an amount (to be determined) towards the cost of the exercise should be adopted.

A further report that considered the issue of single status in schools and the County Council was presented for information. The Forum was invited to note the report.

The Forum discussed the level of contribution that should be made to those schools that were involved in the process.

There were continued concerns about the process in general, and about harmonisation. The Special schools representative was particularly concerned about the potential affect on the special schools and he proposed that the method of structure and method of consultation by which the LA proposed to introduce single status and the associated financial implications should be defined.

It was recognised that this was an ongoing the process. It was likely that the Forum would need to revisit issues associated to the process, perhaps along the lines of the proposal above in the future.

The Schools Forum noted the report and recommended that a contribution of £110 per person interviewed should be made to those schools involved in the process.

9. DESIGNATED OFFICER POST

A report that looked at the issue of funding a new post – Local Authority Designated Officer was presented. The Forum was asked to recommend that a third of the costs of the post (approximately £19K) were met from within the Schools Budget.

Working Together To Safeguard Children 2006 contained radical new requirements for all agencies for the management of allegations against staff (including volunteers).

All allegations would have to be reported to a ‘Senior Manager within the Organisation’ who would decide if they met a relevant threshold for reporting to the ‘Local Authority Designated Officer’ (LADO). The LADO would provide guidance and if appropriate refer the matter to the responsible Team Manager in Children’s Services to set up a strategy discussion.

The guidance was designed to ensure a coordinated response by agencies to protect children and also to investigate allegations within tight timescales.

The report set out the responsibilities of the Local Authority Designated officer post.

These requirements had the status of statutory guidance with a final deadline for implementation by April 2008, but in light of the sensitivity of this issue, it had been agreed to put in place arrangements to implement the guidance from 1 May 2007.

Although this was a local authority ‘designated’ role the LADO was essentially a multi-agency safeguarding role that would provide advice and guidance to all agencies that worked with children in Cumbria to ensure that they adequately safeguarded children through their employment practices and the manner in which they managed allegations.

Cumbria Children’s Services was therefore requesting tripartite arrangements for funding the permanent local authority designated officer role with one third of the costs being met by the Schools Budget, one third being met by the Safeguarding Board and the final third being met by the Local Authority Budget.

The basis for the request for the Schools Forum to recommend these costs was that it was felt that these arrangements were essentially a support service to support over 300 schools in Cumbria that should be funded from a pooled budget for combined services provided by the local authority.

In discussing the report, several members of the Forum questioned how the post would benefit schools. Other members however supported the initiative. This was a national initiative and the Forum was assured that the majority of the staff were schools based staff.

It was requested that further information about the post eg. job description or further clarification of the role be provided to the Forum when available. **The Forum then agreed, in principle, to recommend that a third of the costs of the post (approximately £19K) would be met from the Schools Budget.**

10. DATE OF NEXT MEETING

The next meeting if the Schools Forum would be held on Monday, 2 July 2007 at Newton Rigg, Penrith. The meeting would begin at 9.30am.

11. ANY OTHER BUSINESS

There were no other items of business.

PR/NJS
May 2006