

# **THE CUMBRIAN SCHOOLS FORUM**

## **MINUTES OF THE MEETING HELD ON**

**23 January 2007**

### **PRESENT**

**Mr B Abram (Foundation Secondary)**  
**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 M Chapman (Allerdale Secondary – representing Mrs J Richardson)**  
**Mr P Chappelhow (Cabinet Member, Children’s Services – Observer)**  
**Mr C Clarke (South Lakeland Secondary)**  
**Mr R Coy (Allerdale Primary – representing Mr C Rafferty)**  
**Mrs T Eyre (Copeland Primary)**  
**Ms J Farebrother (Nursery Schools)**  
**Mr C Kirkup (Eden Secondary)**  
**Miss J Marshall (Barrow Primary)**  
**Mrs L Moffatt (Barrow Secondary)**  
**Mr D Nattrass (Voluntary Aided Primary)**  
**Mr C Peale (Voluntary Aided Secondary)**  
**Mr R Rogers (Eden Primary)**  
**Mr A Rutter (Teachers’ Professional Associations)**  
**Mr G Seward (Foundation Primary)**  
**Mr M Smith (Copeland Secondary)**  
**Mr B Thomas (CE Diocese)**  
**Mr E Tumelty (RC Diocese)**

### **Officers in attendance:**

**Ms M Swann (Corporate Director – Children’s Services)**  
**Mr J Swainston (Head of Service – Schools and Learning, Children’s Services)**  
**Mrs A Carmichael (Senior Adviser, 14-19 Strategy)**  
**Mr A Hodge (Children’s Services Finance)**  
**Ms A Sutton (Children’s Services Finance)**  
**Mrs N Shiels (Children’s Services)**

## 1. **MEMBERSHIP**

The Forum noted that Mr M Murphy had resigned as the representative of Carlisle Secondary schools. He had been replaced by Mr Clive Bush, headteacher at William Howard School.

A letter thanking Mr Murphy for his contribution to the Forum would be sent on behalf of the Chair.

It was also reported that Mrs E Barraclough, the Liberal Democrat representative had recently become a member of the Cabinet. A new Liberal Democrat representative would be nominated to join the Forum as an observer.

## 2. **APOLOGIES FOR ABSENCE**

Apologies for absence were received from: -

Mrs E Barraclough

Mr K Little

Mrs M Pickthall

Mr C Rafferty (represented by Mr R Coy)

Mrs J Ricardson (represented by Mr M Chapman)

## 3. **MINUTES OF THE MEETING HELD ON 21 NOVEMBER 2006**

The minutes of the meeting of the Schools' Forum held on 21 November 2006 were agreed as an accurate record.

## 4. **MATTERS ARISING**

There were no matters arising from the minutes.

## 5. **WORKING GROUP MINUTES**

There were three Schools' Forum Working Groups, which had all met since the previous meeting of the Forum on 21 November 2006.

i) Contracts Working Group – The group had met twice, on 7 December 2006 and 19 January 2007 with a further meeting scheduled for 28 February 2007. The meetings had been useful and schools were asked to continue forwarding specific issues that would hopefully be resolved.

The Forum received the notes of the Contracts Working Group held on 7 December 2006.

ii) School Budgets Working Group: The group had met on 10 January 2007 and had continued their work on the review of the formula. The notes of the meeting were tabled. It was agreed that, in future, the notes would be circulated in advance of the meeting.

The Forum received the notes of the meeting of the School Budgets Group held on 10 January 2007.

- iii) SEN, Social Deprivation, Access and Inclusion Working Group: The group had met on 10 January 2007. Attendance at the meeting had been very low and the Chair expressed his disappointment at the level of attendance. There had however, been a very useful presentation that outlined issues relating to SEN including social deprivation funding and personalisation. This had enabled the group to identify particular areas for further consideration at the next two meetings of the group. At the meeting on 6 February the group would consider social deprivation funding and personalisation and on 6 March the group would consider SEN funding.
- Subject to some comments from the special schools representative being incorporated, the notes of the SEN Group were received by the Schools' Forum.

## **FUNDING ISSUES**

### **6. SCHOOLS BUDGET 2007-08**

At the meeting of the Schools' Forum held on 21 November 2006 the budget situation for 2007-08 and beyond had been outlined.

A further report that highlighted some of the budget pressures currently identified for 2007-08 and the potential impact on schools was now presented.

The Forum were asked to express their views on the issues discussed in the report and to agree to an increase to the Combined Services Budget of £501k. The funding would be released via savings achieved within the centrally held budget.

A number of reductions had, so far, been identified as part of the consultation process: -

- Special Schools Development (£100k)  
It was anticipated that the Standards Fund would ensure that most current activity was maintained. However, it could be necessary to stop the Associate Specialist Teacher Programme, which was implemented through secondments. Mentoring in schools had proved to be more successful and would continue.
- Statements (£171k)  
Maintain current statement provision by increasing the statement budget by 2.5%. Statement bands 9, 12 and 15 would increase in line with other increases. Expected increase in the Schools Budget was above inflation at 5%, so this would leave 2.5% for other pressures.
- Non-statutory Allowances (£50k)  
The number of pupils receiving such allowances was decreasing because of falling school rolls and therefore the call on resources was lower.
- Out-county Hospital Tuition (£20k)  
Demand on this budget was falling and advantage could be taken from the savings in staff time.
- Sure Start/Lifelong Learning (£100k)  
This would be achieved through a reduction in management costs – possibly also recharging management costs to the General Sure Start Grant (total £100k).

Budget pressures had been identified within this non-Schools Budget eg general inflation and home to school transport. These pressures would have to be funded by reductions elsewhere in the budget. One suggestion, was to transfer some of the costs that had been found from the Local Authority budget into the centrally-held Schools Budget. This could be done by further increasing the Combined Budget line.

This would be a redefinition of expenditure which had been added to national regulations to recognise the multi-agency work that local authorities already were or would be undertaking in relation to the Every Child Matters agenda, and where that work was of direct benefit to pupils and schools. The Forum had the power to approve the retention of an amount of this funding within the central Schools Budget to support this work.

While reflecting on this, the Forum should consider or agree to review two specific tests as defined by DfES. The first of these was an educational benefit test – to ensure that this funding would be used to bring educational benefit to pupils in an authority, whether in maintained schools or in any other provision. The second test would be to ensure that the amount of funding made available was roughly equivalent to the educational benefit that would be derived.

DfES guidance stated that the Forum should understand, however, that within the management of the service some of the funding could ultimately end up being spent on the more social or therapeutic elements of the service where this was most appropriate in terms of providing benefits for the children in question.

In discussing the report there were specific concerns about the cost pressures in relation to home to school transport, the specialist advisory teaching service and children's centre costings.

It was explained that the process was about taking an overall strategic view and that this had to be set within the context of the re-structuring of the Children's Services Directorate (CSD).

CSD had been set a savings target that would contribute to the CCC cost of the forthcoming equal pay claim. A number of the current CSD budgets were historical and this process allowed the opportunity to review every activity and budget. A number of budget options and range of costing models would be presented to Cabinet on 30 January and the work would be ongoing. In summing up the Chair felt that there was general, though reluctant, support for the recommendation.

**The Schools Forum recommended an increase to the Combined Services Budget of £501k. This funding would be released via savings achieved within the centrally held Schools Budget.**

## **7. FACILITY TIME**

The Chair declared an interest so the Vice-Chair took the Chair during consideration of this item.

A report that introduced a case for the Forum to review and reconsider the current arrangements for resourcing Trade Union duties in respect of the Teaching Associations was considered.

Over the years in Cumbria there had been a range of different models for supporting Trade union duties in respect to schools. The current resourcing position was not based on any model and did not reflect the level of time currently committed to this activity.

Teachers' unions had already had increased responsibilities in respect of individual staff moving from management grades to TLR. Additional 'case work' was likely to follow from recent changes in workforce reform and performance management, which were national issues, and the specific local challenge of School's re-organisation.

These proposals did not affect arrangements currently existing in respect on non-teaching unions. The Forum currently resourced a UNISON convenor of education and arrangements for resourcing G.M.B. were temporary and currently found from without the Schools Budget.

It was in the best interest of Cumbria LA, and Cumbria Schools to have a constructive partnership/relationship with Teacher's Trade Unions, committed to prevention rather than confrontation. The School Reorganisation programme would generate additional work for schools and effective Trade Union Support would enable this to be better managed. The case for additional resourcing, in view of the School Reorganisation agenda, as well as the new work relating to workforce reform and performance management was a sound one.

There was some concern that the non-teaching unions were not represented on the Forum but it was explained that they had been offered one place on the Forum but they were not able to reach an agreement about common representation.

**The Schools Forum agreed to adopt the following recommendations: -**

- i) The Forum supported the principle that resourcing of teacher unions facility time should be based on membership and accountability.**
- ii) The Forum recognised that the present resource allocated for teacher's union facility time was inadequate and that to accommodate known and anticipated pressure, the amount allocated in the Schools Budget should increase to an estimate of around £130,000.**
- iii) The Forum should adopt the proportional allocation model proposed by the Unions modified if necessary to ensure the allocation does not exceed resources.**
- iv) The Forum supported the allocation of resources based on standard supply rates.**
- v) The Forum required the teacher's unions to be transparently accountable for their time and resourcing. All resources would be**

**regularly reviewed in the light of auditable evidence to demonstrate what level of activity was and what resourcing was required.**

- vi) **The resourcing model should be reviewed by the Forum in January 2008 and its extension or amendment be determined in the light of objective evidence of actual activity.**

## **8. TRANSITIONAL FUNDING FOR SCHOOL ORGANISATION**

The Forum considered a report that highlighted some of the budget pressures currently identified for 2007-08 and the potential impact on the Schools Budget.

The review of schools in Cumbria was now well underway and recommendations had been made by Cabinet that would affect secondary schools in Carlisle and North Copeland. The work continued to be rolled out to all areas of the County. As part of the process, a number of Transitional Arrangements Groups had been set up to ensure the continuity of education provision at schools affected by any reorganisation. It was recognised that these transitional costs would be short-term and that once the new arrangements were in place, all schools would benefit from resources freed from closing schools.

A number of costs had been identified at schools currently involved in the process. These were costs arising from the process of transition to any new arrangements and were not costs of the new arrangements, which would be funded through the current mechanisms. Following the precedent already established in the formula to fund amalgamating primary schools, it was suggested that any such additional costs should be applied through the lump sum allocation in the formula.

Any deficit that remained when a school was closed had, in the past, been met from within the Schools Budget and it was proposed that this practice should continue. However, it was stated openly that some of the deficits for closing secondary schools would be larger than those that had been encountered with primary schools. As part of the school reorganisation process, officers from the LA would work with schools to ensure that any such deficits were kept to a minimum and were reduced as far as possible while continuing to safeguard provision for children and students.

There would be additional short-term costs falling to the LA. These were still being worked on but would include transport. Should this impact on the Schools Budget, then a further paper would be brought to the Forum.

In discussing the report there was a specific question relating to temporary accommodation at William Howard School. There was also considerable concern relating to the situation at Morton School in Carlisle and in particular in relation to the deficit budget. Whilst it was stressed that the school had worked hard to improve, it was acknowledged that the deficit had impacted on the ability to improve. This was, however, a separate issue.

Some members also had concerns about the impact on current pupils and felt that it was important that the changes and transition arrangements should not be at the 'cost' of current pupils.

**The Schools Forum recommended that: -**

- i) **Transitional costs impacting on affected schools should be met via an additional allocation to the Lump Sum factor within the formula, based on the model that had been adopted at William Howard School. The Schools Forum would be updated at each stage.**
- ii) **Further information should be provided before a decision could be taken regarding deficits at closing schools continuing to be met from within the Schools Budget.**

## **9. TRENDS EMERGING FROM THREE YEAR BUDGETS**

The trend emerging from three-year budget returns was that net balances would increase over the next three years whilst the number of deficits would reduce. This was based on very draft figures that had been received from schools.

The main concerns for schools in the future were reported to be threshold and the profile of the staff in schools. It was thought that schools had not yet felt the full impact of these two issues.

The 'creative' use of surplus balances was discussed but this was an area that would need further investigation.

## **FORUMLA ISSUES**

### **10. KS4 PRACTICAL CURRICULUM – 14-16 FUNDING**

A report that sought the views of the Forum in amending the proposed allocation of KS4 Practical Curriculum funding was presented.

Secondary representatives on the Forum contributed views, from each of their areas, following discussions that had taken place in the last few weeks on this issue.

**The Schools Forum recommended that the funding should be allocated via the AWPU but that it would be earmarked so as to allow it to be monitored.**

### **11. TEACHERS PAY GRANTS**

A report regarding funding for Teachers Pay Grants was considered.

The former Teachers Pay Grants were targeted at schools with teachers moving to the Upper Pay Scale and the Leadership Scale but these grants had ended in 2005-06. Following discussions with the Forum, last year, it was decided that the LA would attempt to replicate the method of funding used to allocate the former grants. An amount was established, based on the previous year's total and this was allocated using 100% funding for the difference between M6 and UPS1 and 60% contribution to other scale costs. The Forum also advised that from April 2007, one third of the amount identified should be allocated via AWPU. In future years this would be increased so that by 2009-10 all of the identified amount would be within the AWPU.

A number of schools and members of the Forum had asked that this issue be revisited for April 2007.

**The Schools Forum recommended that the funding should be allocated on the same basis as in 2006-07.**

## **OTHER**

### **12. SCHOOL MEALS**

The Schools Forum considered a report that provided an update on the school meals service, as requested by the Forum at the meeting held on 21 November 2006.

There were a number of queries regarding budget and expenditure. Members of the Forum that had such queries were advised to contact the relevant officer directly.

**The Schools Forum noted the progress report.**

### **13. STRESS IN THE SCHOOL BASED WORKFORCE**

A report that set out the eight recommendations made by the CCC Scrutiny Panel following their consideration of this issue and the proposed response by the authority was presented.

On 11 October 2006, the Children's and Young People's Scrutiny Panel had received a report regarding the 'Stress in the School Based Workforce Task Group'. The paper included two appendices. The first appendix was a report by the Head of Learning Support Services that had previously been considered by Scrutiny on 28 April 2006. The Panel had accepted the trend information for absences as presented in the report. The second appendix was a report written on behalf of the Cumbria Primary Headteachers' Association, which highlighted issues of concern.

The recommendations made by the Scrutiny Panel had been considered by Cabinet on 28 November 2006 and Cabinet had acknowledged that they shared many of the concerns that had been raised but noted that they were not problems that the LA could solve in isolation.

This was a complex issue that had originally been related to levels of absence in schools. There was a view that a number of issues had been confused ie. staff absence and the perception that the problems were stress related. The issues needed to be separated out. It was also suggested that the availability of counselling services should be added to this debate.

The Schools' Forum remit was to consider funding issues and the funding issues related to this matter were unclear.

**The Schools Forum therefore recommended that the issue should be taken back to the Children and Young People's Scrutiny Panel with a request that a clear brief on action required be provided.**

#### **14. HUMAN RESOURCE SUPPORT FOR SCHOOLS AND THE STATUTORY FUNCTIONS OF THE LOCAL AUTHORITY WITH REGARD TO STAFF IN SCHOOLS**

The Forum considered a report that proposed new arrangements that were sufficient to address the strategic HR functions of the LA and schools and to create the personnel administration work and records necessary to deliver the strategic HR functions.

The Local Authority statutory functions for personnel administration and strategic HR of staff in schools had been a cause for concern for some time.

When the Local Authority established its contract with CAPITA for HR services no provision was made to carry out the Local Authority functions for staff in schools. All relevant expenditure was delegated to schools as required by DfES and the schools in turn mainly contracted with CAPITA. A small number of schools contracted with other suppliers.

The Local Authority had statutory obligations for staff in schools defined in regulation that were separate from the statutory functions of the governing bodies. Also there were new regulations coming out in May 2007, which would be commenced in January 2010.

An initial pressure would be to carry out the HR work related to the Schools Reorganisation.

Long-term manpower planning work by the Local Authority would be carried out by senior staff in the Director's Management Team assisted by the HR Officers in CAPITA and in the Authority

The recent benefits to the Council and Schools from having a schools experienced HR Consultant, supporting the School Re-organisation process and developing policy and good practice guidelines has been widely acknowledged.

It was, therefore, proposed that the Children's Service HR team should be enhanced by two further posts. A Children's Service (School's) HR Manager and a Children's Service (School's) HR Assistant. The level of support required may reduce when the School Re-organisation process was complete. These posts were not intended to be alternative providers to Capita and the other HR providers that schools currently contracted from their delegated budgets.

**The Schools Forum recommended that: -**

- i) The Forum allocated from the Schools Budget the sum £71,290 or £39,000 to cover the cost of strategic HR Support for Schools from the schools, and;**
- ii) That this was subject to an annual review, which would be based on a report on the work undertaken, and evidence of a continuing need for this, level of support.**

**15. ANY OTHER BUSINESS**

There were no other items of business.

**16. DATE OF NEXT MEETING**

The next meeting if the Schools Forum would be held on Tuesday, 27 March 2007 at Newton Rigg, Penrith. The meeting would begin at 9.30am.

PR/NJS  
March 2006