

CUMBRIAN SCHOOLS FORUM – SCHOOL BUDGETS WORKING GROUP

Notes of the meeting of the School Budgets Working Group held on Tuesday, 6 February 2007 at Newton Rigg, Penrith.

Present: Jane Blacklock (Small Schools), Steven Bowditch (Special Schools), Clive Bush (Carlisle Secondary), Chris Clarke (South Lakeland Secondary), Rod Coy (CE Diocese, representing Bert Thomas), Janet Farebrother (Nursery Schools), Karen Forsyth (Bursar, Wyndham School), Chris Kirkup (Eden Secondary), Jennifer Marshall (Barrow Primary), Liz Moffatt (Barrow Secondary), David Nattrass (VA Primary Schools), Chris Rafferty (Allerdale Primary), Rod Rogers (Eden Primary and Chair of Group), Alan Rutter (Teachers' Associations), Malcom Smith (Copeland Secondary), Richard Waple (Bursar, Ulverston Victoria High), Veronica Warner (Bursar, Barrow Schools) Anton Hodge (LA), Ashleigh Sutton (LA), and Nicola Shiels (LA).

Apologies: Mr C Peuple, Mr B Thomas

1. Notes of the Meeting held on 10 January 2007

Subject to an amendment to page 2, the notes of the meeting of the School Budgets Working Group held on 10 January 2007 were agreed as an accurate record.

2. Matters Arising

There were no matters arising.

3. School Funding Formula Review

At the meeting of the School Budgets Working Group held on 10 January the group had agreed to consider in more detail: -

- What was happening elsewhere eg. other Local Authorities
- The work that was ongoing with schools regarding cost pressures
- AWPU – how it was built up – could a more simplistic formula be built up based on cost drivers?

In terms of timescale, it was assumed that the Schools Forum would approve a model, or number of models, for consultation with schools at their meeting on 2 May 2007. Responses to the consultation would then be reported back to the Forum during the Autumn term. Before 2 May 2007 the School Budgets Working Group would need to continue working towards the agreed model(s) that would be presented to the Schools Forum on 2 May.

A number of other Local Authorities had been asked to provide information regarding their funding formula. Short summaries of four of the authorities that had responded had been produced and these were presented to the group.

Copies of the summaries (as well as a summary of Cumbria's funding

formula) would be made available if requested.

Some of the points included: -

Devon County County

- Activity led
- Based on the needs of key stages, not years
- Average class size of 25 (maximum 30) across all key stages, lower for some KS3 and KS4 subjects
- Full time nursery nurse for each foundation class of 25 in addition to a teacher
- One full time non-teaching support for every two classes at all key stages
- A minimum of a full time administrator (school hours) for every school
- Sufficient funding for national curriculum materials, IT and premises issues

The formula was introduced in April 2003 and protection was given to schools based on their 2002/03 funding levels.

City of Sunderland

- Activity led
- The various costs (staffing, resources etc) were the building blocks of the model
- Costs were split between fixed and variable
- Fixed elements were paid in full and the variable elements were scaled to match the budget share
- Nursery classes were excluded from the scaling process
- Funding numbers were based on actual pupil numbers in the January census
- Base models were based on the following class sizes
 - Nursery classes 13
 - Infant, Junior and Primary 15 or 30 (two base models)
 - Secondary 30
- These base models were then multiplied up to give aggregated models of greater pupil numbers for each type of school
- A school's funding was based on the model with a pupil total of just below the school's actual roll, plus an additional amount for each pupil above the number in the model school

Trafford Council

Trafford had considered activity based funding but this had been rejected and a modified version of the previous formula had been adopted.

Mainstream Schools:

- Pupil-led funding eg. AWPU values, infant class size funding, small school allowance, enhancement of curriculum in 11-16 schools, etc.
- Premises related funding in primary and secondary schools eg. day to day maintenance and building repairs, grounds maintenance, rates, etc.

- Other services eg. school meals, school swimming and transport, etc.
- Administrative Services eg. governor support, clerking of governing bodies, insurance, etc.

Special School Funding – based on the number of planned places.

Thurrock Council

Thurrock Council had not chosen activity based costing and funding was similar to Cumbria.

Mainstream Schools:

- Pupil-led funding eg. AWPU values. Nursery units, SEN pupils with statements, English as an additional language, etc.
- Non Pupil-led funding eg. social deprivation factor, primary turbulence, small school allowance, curriculum support, etc.

Special School Funding

- Place-led funding
- Pupil-led funding
- Non-pupil elements

Overall, in terms of delegation there was some inconsistency eg. former GM schools had some things delegated whilst others did not ie. school library service. Special schools were largely place led with only a small number, pupil led.

The presentation had given a flavour of what was happening in other local authorities. Some had activity-based models, some had rejected and formulas could be as complicated as wished, however, the more complicated, the more cause for concern/discussion/disagreement.

During the debate a number of points were made, including:

- What was the formula trying to achieve?
- What proportion should be pupil led and what should be outside the AWPU?
- Should there be a lump sum, how could this be justified?
- Issues to consider – KS2 AWPU, class size, NQT
- Accepting that there would always be small schools in Cumbria but need to consider how to justify how any small schools should be funded
- Taking account of the professional view of delivering entitlement through a model that all understand
- Cumbria to be applauded because of the relative simplicity, compared to the other examples, of their formula. In future, it should be kept simple but within a national reference point
- Primary/secondary split – differences in provision, emotive but about determining a formula that enabled the delivery of quality education across all key stages

The Group requested further information on two models: -

- Activity Based
- To look at elements that should not be included in the AWPU eg. lump sum element and what could be included in the lump sum.

AH/AS

Assistance from the bursars that attended the School Budgets Working Group would be welcomed in the development of the activity-based model.

- Looking Ahead – the aim would be to bring proposals to the next meeting of the School Budgets Working Group on 6 March 2007.

4. **Any Other Business**

There were no other items of business.

5. **Date of Next Meeting**

The next meeting of the School Budgets Working Group would be held on Tuesday, 6 March 2007. The meeting would be held at Newton Rigg, Penrith and would begin at 9.30am.

P&R/NJS
February 2007