

CUMBRIAN SCHOOLS FORUM – SCHOOLS’ BUDGET WORKING GROUP

Notes of the meeting of the Schools’ Budget Working Group held on Thursday, 7 September 2006 at Newton Rigg, Penrith

Present: Jane Blacklock (Small Schools), Steven Bowditch (Special Schools), Philip Chappelhow (Cabinet Member – Children’s Services), Janet Farebrother (Nursery Schools), Karen Forsyth (Bursar, Wyndham School), John Howard (Bursar, Queen Elizabeth School, Kirkby Lonsdale), Jennifer Marshall (Barrow Primary), Kath Martin (Queen Elizabeth Grammar School, representing Chris Kirkup, Eden Secondary), Janice Murphy (Bursar, St Aidan’s County High School, representing Martin Murphy, Carlisle Secondary), David Natrass (VA Primary Schools), Chris Rafferty (Allerdale Primary), Mr Rod Rogers (Eden Primary and Chair of Group), Malcolm Smith (Copeland Secondary), Bert Thomas (representing Canon Jenkins, CE Diocese), Richard Waple (Bursar, Ulverston Victoria High), Anton Hodge (LA), David Johnston (LA), Harry Slater (LA) and Nicola Shiels (LA).

Apologies: Mr C Clarke, Mr S Higgs, Mr C Kirkup, Mrs L Moffatt, Mr M Murphy, Mr C People, Mrs M Pickthall, Mr A Rutter, Ms V Warner

Colleagues from Capita, Liz Fergusson and Karen Rees had also joined the meeting for item 3 on the agenda relating to school contracts with Capita. Liz was the new Head of HR and Payroll.

1. School Contracts with Capita

Action

A report was presented that had been produced in response to concerns expressed about Capita contracts with schools, following a meeting between a wide range of Trade Unions and the Chief Executive in May 2006. At the meeting County Council HR advice and support had been discussed but a greater emphasis had been placed on the long-standing issue of the separate contracts provided by Capita to schools. In order to make progress it had been agreed that a report should be presented to the Schools’ Forum, School Budgets Working Group as a basis for discussion.

The group were asked to consider and comment on service delivery, both generally and specifically, service costs/fee structures and the suitability of a draft set of Key Performance Indicators for schools that were attached as an appendix to the report.

Colleagues from Capita were keen to hear about the issues and concerns, and to debate and try to resolve them. In order to do this evidence would need to be produced to support any concerns.

Unfortunately, no one that had attended the meeting in May was available to comment. There was, however, a short discussion during which several members made comments/observations about some of the services they received from Capita. The group were also reminded that a Contact Group had previously been established. The group had met with Capita once and had looked at a range of issues but had not met again.

The School Budgets Group agreed that a small group should be established.

The core membership of the group would be the Chair and Vice-Chair of the School Budgets Group plus a bursar (Rod Rogers, David Nattrass and Richard Waple). Philip Chappelhow would attend as an observer. The group would work together with officers including Conway Stewart and Anton Hodge to look at the proposed KPIs as well as concerns that schools might have about contracts, etc.

2. Notes of the Meeting held on 4 July 2006

The notes of the meeting of the Schools' Budgets Working Group held on 4 July 2006 were agreed as an accurate record.

3. Matters Arising

List of those Present – There was a request that the christian names of those present at meetings were included in the notes of future meetings.

Supply List – At the last meeting, the group had discussed the continued provision of a supply list, by Capita. The group had felt that there were issues relating to value for money and had asked for a further report that set out whether there were any realistic alternatives. A further report suggesting the use of an agency rather than the continued provision of a supply list would be presented to the Schools' Forum on 19 September. The Forum would be asked for their views.

4. Model of School Expenditure

At the meeting of the Schools' Forum on 20 June further reservations had been expressed about the model of expenditure and that it was based on the cost of a class.

The Forum had asked for information as to the basis on which other similar authorities constructed their formulae and if there were any that based their allocation upon need.

The other authorities within Cumbria's Ofsted family had been surveyed and it appeared that the majority had a formula that was primarily based on a historical position with targeted additions to meet additional responsibilities and changed Government priorities. Almost all had indicated that they were currently reviewing their formula.

The group had also received an update report and a list of critical policy questions that would drive the model of expenditure.

Overall, the School Budgets Working Group had completed around two years of work related to the review of the formula/model of school expenditure. The Chair of the group was keen to engage the full Forum with the process and for the Forum to give an indication of commitment to the continuation of the work.

In order to do this the group decided to seek agreement from the Forum on the principles and policies that had emerged before any further work was undertaken.

Following a long discussion the group agreed the following principles of formula funding: -

- The formula would allocate a total sum equivalent to the total for Cumbria set by central government.
- A new formula budget was required to reflect the needs of individual children and groups of children.
- The model of expenditure should be based on the cost of providing the minimum statutory and contractual requirements. Any further monies available could then be distributed in a manner recommended by the Schools Forum to Cabinet.
- There should be one formula applied equitably to all schools throughout Cumbria.
- Any change in the formula would cause some schools to be allocated less budget than before and some to be allocated more budget. There may be a shift between sectors.
- There should be a transitional period to dampen the impact of change that would secure practical and professional management of change.

On 19 September, the Schools' Forum would be asked to endorse these principles and to consider the critical policy questions that had been identified. There may be others to add – these could come from discussions with constituents and be fed back within an identified timescale.

5. Model of Expenditure – Personalised Learning

A report was presented that gave an outline of the research work to help to establish a policy and a funding formula for personalised learning. In December 2005, DfES had written to ask every local authority to review the current arrangements for funding schools for the costs of deprivation and also, to consider in conjunction with the Schools Forum, whether change was required.

There was a major gap between the outcomes of children from disadvantaged backgrounds and their peers. The performance gap increased with the age of pupils. This was a national picture, which also applied in Cumbria. Central Government was anxious that schools should try to eliminate the gap in performance.

Detailed statistics were available for every school showing the difference in the scores at each key stage for the free school meal group compared with the others. It was suggested that a sample of schools should be studied in more depth. Only 41 schools (12%) had both more than 10 FSM pupils and more than 20% eligible for free school meals in a cohort over a three-year period from 2003 to 2005. Within that sample it was noticeable that in some schools the FSM pupils had an equal or better performance record than those not eligible for FSM. For example, at Key Stage 3 the average score per school in English, maths and science was 60% in the non FSM group. The FSM group ranged from 20% to 60%.

It was suggested that the differences be researched. They may be important. A report on the outcome could be presented to the Budget Working Group in December, before the end of the school term.

6. South Lakeland District Council – Sports Centre

In November 2003 the Schools' Forum had received a report that had proposed changes to the Scheme of Delegation which would enable the LEA

to recover costs it incurred, in securing from third parties, the provision of premises and services that were used by schools on activities for which funding had been delegated.

The Forum had recommended that the LEA seek an amendment to either the current scheme or formula in order that all schools using premises owned/occupied by third parties could either be recharged the costs incurred by the LEA in securing these premises or alternatively that the formula allocation could be so amended as to reflect the cost of the free use of premises.

Schools had been consulted and Cabinet had agreed that the scheme should be amended accordingly.

However, it was reported that one school had continued to raise objections and it had transpired that the scheme had not legally changed, as there was no evidence that the school had actually been consulted. In order to correct this a further (consultative) letter would be sent to all schools with some mechanism built in to ensure that schools had received the correspondence. This purpose of this item was by way of update and to alert colleagues that this was going to happen.

7. Any Other Business

Forum Website – It was noted that the Forum website had not been updated for some time. Officers agreed to look into this.

NS/AH

8. Date of Next Meeting

The next meeting of the Schools' Forum would be held on 19 September 2006. The Schools' Budget Working Group agreed that they would not set a date for another meeting until after the Forum had met on 19 September 2006.

P&R/NJS
13 September 2006