

## CUMBRIAN SCHOOLS FORUM – SCHOOL BUDGETS WORKING GROUP

**Notes of the meeting of the School Budgets Working Group held on Wednesday, 10 January 2007 at Newton Rigg, Penrith.**

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

**Apologies:** Mr S Bowditch, Mr S Higgs, Mr M Murphy, Mr C Peuple, Mrs I Roberts-Green

### **1. Notes of the Meeting held on 11 November 2006**

The notes of the meeting of the School Budgets Working Group held on 11 November 2006 were agreed as an accurate record.

### **2. Matters Arising**

There were no matters arising.

### **3. School Funding Formula Review**

At the previous meeting of the School Budgets Working Group revised working arrangements to support the Schools' Forum and the working groups had been outlined.

A timetable and project brief for the review of the formula had also been developed with the intention of refocusing the work.

Any work that had been done previously would not be disregarded but a different approach would be adopted which should bring new ideas, and stimulate discussion about the formula.

As an introduction, there was a presentation that brought the group up to date with progress so far. Work was ongoing with schools to identify cost drivers, information was being gathered from other authorities and pupil related costs vs other costs were being investigated.

The presentation identified a number of issues for discussion: -

- What should be included in the formula?
- What should the formula do?
- Cost drivers – what were the main ones?
- Major principles
- Pupil numbers – pupil led vs place led: SEN and nursery
  - age weighted

- what should be included in the AWPU?
- small schools
- January 12/12ths
- SEN, Additional Educational Needs (AEN), social deprivation – how should statements, non-statutory SEN and social deprivation be funded?  
In other authorities this funding was place led whereas in Cumbria it was pupil led.  
There were a number of methods to allocate social deprivation funding – was FSM the most appropriate?  
Personalisation also needed to be considered.  
It was proposed that the SEN, Access and Inclusion, Social Deprivation Working Group should consider these issues in more detail and report back to the School Budgets Group and the Schools' Forum.
- Infant class size
- School meals – this was allocated by a complicated formula. Consideration of this element could be separated out and dealt with as a stand alone item. When this element was considered, it was felt that meals for nursery children should be taken into account.
- Other factors – rates and other premises factors – should there be more premises factors?
  - delegation variations
  - school library service
  - admissions and appeals
  - NQTs
  - Minimum funding guarantee (MFG)
  - lump sum

SEN  
WG

Other issues that should also be considered included: -

- Teachers Pay Grants
- PPA
- Personalised Learning
- Others ?

Previously, it had been requested that contact be made with other Local Authorities (LAs) to establish how schools in other authorities were funded and whether other LAs were undertaking similar reviews. It was reported that of the other authorities that had been contacted, any that were reviewing their formula were also trying to bring a rationale to the AWPU.

Other LAs, generally, had a lower level of AWPU than Cumbria, bigger lump sums, a lower element for social deprivation (calculated using less simplistic methods than FSM) and premises factors were included.

The work with the other LAs would continue as would the exercise involving 50+ schools to identify the cost drivers/pressures. It was hoped that a comprehensive report on these two areas would be available at the next meeting of the School Budgets Working Group on 6 February 2007.

AH/AS

The group discussed the possibility of developing a representative sample of schools that could be used to 'test' proposals rather than using all schools. Whilst the group understood this notion, it was agreed that when it was necessary to look at the effects of particular proposals on schools, all schools should be included.

The group recognised that this process would evolve over the next twelve months and it was hoped that at the end of the process the AWPU would have more clarity and the formula would be:-

- more transparent
- more predictable
- simpler, and
- would have more adherence to/reflect national norms

A number of areas that could be considered as part of the review of the formula were suggested. These included:-

- Pupil led vs place led funding
- Premises – age and condition of buildings, etc
- Lump sum – could there be a justification for the lump sum eg average cost of a headteacher
- Cross key stage issues – need to provide quality education provision at each key stage
- 12/12<sup>th</sup> or 7/12<sup>th</sup> and 5/12<sup>th</sup>
- Foundation stage AWPU
- Penalties for success
- Teaching Assistants, PPA time/non-contact time
- What was in the AWPU and what was outside of the AWPU?
- Level of SEN expenditure elsewhere?
- Possible elements that could be held centrally to be more economic

Looking Ahead – the next meeting of the group would 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?

AH/AS

#### **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 February 2007. The meeting would be held at Newton Rigg, Penrith and would begin at 9.30am.

P&R/NJS  
22 January 2007