

## CUMBRIAN SCHOOLS FORUM – SCHOOL BUDGETS WORKING GROUP

**Notes of the meeting of the School Budgets Working Group held on Monday, 11 June 2007 at Newton Rigg, Penrith.**

**Present:** Jane Blacklock (Small Schools), Steven Bowditch (Special Schools), Clive Bush (Carlisle Secondary), Chris Clarke (South Lakeland Secondary), Janet Farebrother (Nursery Schools), Karen Forsyth (Bursar, Wyndham School), Chris Kirkup (Eden Secondary), Jennifer Marshall (Barrow Primary), David Nattrass (VA Primary Schools), Rod Rogers (Eden Primary and Chair of Group), Alan Rutter (Teachers' Associations), Richard Waple (Bursar, Ulverston Victoria High), Anton Hodge (LA), Ashleigh Sutton (LA), and Nicola Shiels (LA).

**Apologies:** Mr P Chappelhow, Mrs L Moffatt, Mr C Rafferty, Mr M Smith, Mr B Thomas

### **1. Notes of the Meeting held on 8 May 2007**

The notes of the meeting of the School Budgets Working Group held on 8 May 2007 were agreed as an accurate record.

### **2. Matters Arising**

There were no matters arising.

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

There was a presentation that brought the group up to date with the progress that had been made.

The School Budgets Working Group had looked, in detail, at activity based models and to a much lesser extent had considered and XYZ model that asked which factors should not be allocated with respect to pupil numbers. Some research into what other LAs were doing had also been undertaken.

At the same time the SEN, Social Deprivation, Access and Inclusion Working Group had been considering social deprivation funding and whether FSM remained the most appropriate method of allocating this funding. Alternative models of allocation had been investigated and information about commercial packages such as acorn and mosaic had been requested.

The School Budgets Working Group now needed to consider whether it was appropriate to consult with schools. If the consultation was to go ahead, the Schools Forum, on 2 July 2007, would need to agree what would be included in the consultation paper.

When the group had met on 8 May 2007 examples of the effects of the different models, when applied, had been available. The most noticeable shift had been away from secondary. As a result, some

comparative work with other LAs had been undertaken. Looking at similar types of LA, Cumbria appeared to fund secondary schools slightly more generously than these others (including Devon, Cambridgeshire). This was supported by a member of the group who had previously worked in Cambridgeshire. Secondary school budgets had been tighter and more difficult to manage. The county was very similar to Cumbria in terms of rural and spread, however, there were many fewer small schools.

Looking at other LAs had been useful in comparative terms, however, each LA had individual factors that affected the overall levels of funding and methods of allocating the funding to schools.

Information had also been requested regarding transitional arrangements that could be put in place to support schools through any changes that were agreed. Transition arrangements would be largely dependent on the effect that the changes would have on some schools so no work had yet been done.

There was a long discussion. Some of the points raised in the discussion included: -

- continuing concerns about the group sizes used in the ABC model, further discussion was needed.
- was no change an option?
- had the work reached a point where it was appropriate to consult with schools or did it remain too complicated for all but those that had been directly involved ie. members of the School Budgets Working Group and LA officers.
- the ABC model was based on agreed principles - did the group need to revisit these principles?
- strategic schools – there had to be some recognition that there would be a number of schools that were strategic and would need to be protected.
- was it appropriate to consult on something that could potentially produce major shifts in funding?
- insufficient time had been spent looking at the XYZ model.
- group working outside comfort zone – more steer from LA officers was required.
- transparency was key.
- if proposals for changes were not agreed by April 2008, it would not be possible to implement any changes until 2011.

The discussion illustrated how difficult the process was. It was agreed that a further meeting of the group was needed before the meeting of the Schools Forum on 2 July 2007.

The School Budgets Working Group would meet again on 27 June 2007 to look at the ABC model and review the various components to try to ensure that there was a good understanding of how they had been arrived at. The group would also look at the XYZ model in more detail.

4. **Any Other Business**

Procurement Service Review – A focus group was being established which would include a representative of the Schools Forum. It was agreed that this would be raised under AOB at the next meeting of the full Forum on 2 July 2007.

5. **Date of Next Meeting**

The next meeting of the School Budgets Working Group would be held on Wednesday, 27 June 2007. The meeting would be held at Newton Rigg, Penrith and would begin at 9.00am.

P&R/NJS  
June 2007