

## **CUMBRIAN SCHOOLS FORUM – SCHOOL BUDGETS WORKING GROUP**

**Notes of the meeting of the School Budgets Working Group held on Wednesday, 18 April 2007 at Newton Rigg, Penrith.**

**Present:** Jane Blacklock (Small Schools), Chris Clarke (South Lakeland Secondary), Rod Coy (CE Diocese, representing Bert Thomas), Janet Farebrother (Nursery Schools), David Keetley (representing Chris Kirkup, Eden Secondary), Jennifer Marshall (Barrow Primary), Liz Moffatt (Barrow Secondary), David Nattrass (VA Primary Schools), Rod Rogers (Eden Primary and Chair of Group), Alan Rutter (Teachers' Associations), Malcom Smith (Copeland Secondary), Richard Waple (Bursar, Ulverston Victoria High), Anton Hodge (LA), Ashleigh Sutton (LA), and Nicola Shiels (LA).

**Apologies:** Mr S Bowditch, Mr C Bush, Mr C Kirkup, Mr C Rafferty, Mr B Thomas

### **1. Notes of the Meeting held on 6 February 2007**

The notes of the meeting of the School Budgets Working Group held on 6 February 2007 had been amended and agreed at the meeting of the Schools Forum held on 27 March 2007.

### **2. Matters Arising**

There were no matters arising.

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

At the meeting of the School Budgets Working Group held on 6 February summaries of the funding formulae of four other local authorities, alongside the current formula operated in Cumbria had been considered. Officers had then been asked to develop two alternative funding models for further consideration: -

- An Activity Based Model (ABC) that looked at the composition of the AWPU
- A model that looked at which components should be kept outside the AWPU

A draft activity led model was discussed in detail at a budget workshop that was held on 6 March 2007. During the workshop each element of the model was challenged and debated, with much of the debate focussing on staffing costs. Some amendments to the figures had been requested and officers had been asked to gather evidence from schools to substantiate some of the proposed figures. Following the workshop the model was amended and the current version was now presented to the working group.

Appendix A to the report set out the basis of the calculations used for staffing and non-staffing costs.

Appendix B gave details of the average class sizes that had been used in the model. The need for smaller class sizes at KS3 and 4 were reflected.

There was a long discussion about the average class size at the different key stages. It was suggested that the foundation stage should perhaps be 20 rather than the proposed 25. The proposed figures for KS3 were felt to be reasonable but there was a lengthy debate regarding the proposed figures for KS4 and actual practice in schools. The KS4 curriculum was much more complicated – practical, vocational, different places of study, size of groupings, etc. There was some concern that the activity based model did not reflect the reality that it should. Taking account of the concerns that had been expressed, the proposed figures for KS4 class sizes were eventually agreed.

Appendix C illustrated the financial effects of the current draft model and showed the resulting AWPU for each stage as well as the non-pupil led costs that had been identified.

The group worked through Appendix A, the basis of the calculation and agreed each of the staffing costs and non-staffing costs as follows: -

#### Staffing Costs

**Teaching Staff** – Cost of a teacher at M6, plus 10% PPA time, divided by the average class size.

**Supply Staff** – Cost of a teacher at M6 for 9 days supply cover per year, divided by the average class size.

**Management** – Lump sum of 1.0 fte head teacher per school (determined by grouping based on pupil numbers)

Plus 20% of Teaching Staff funding delivered through the AWPU.

There was some discussion on this issue regarding the different types of management structures that were in place in different schools. It was felt that there should be some further investigation into actual practice in schools and Richard Waple agreed to collect actual figures from colleagues that would contribute towards the development of a realistic proposal.

**Teaching Assistants** – Foundation – one staff member at scp 17 per 25 pupils. Primary – one staff member at scp 17 per 50 pupils. Secondary – half a staff member at scp 17 per 50 pupils.

**Technicians** – Secondary – one staff member at scp 21 per 100 pupils.

**Mid-Day Assistants** – Primary – one assistant per 25 pupils for one hour each day. Costs were based on full pay for 38 weeks, half pay retention for 14 weeks and the cost of a meal. Secondary – one third of the amount for Primary.

**Administration** – Lump sum of 30% of head teacher funding. Plus an amount per pupil – methodology to be finalised.

**Premises Staff** – Primary – 2 hours of cleaning and care-taking per day per 25 pupils. Secondary – 3.2 hours of cleaning and care-taking per day per 25 pupils. Costs were calculated using an average hourly rate for caretakers and cleaners and based on a 52 week year.

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### Non-Staffing Costs

**Exam Fees** – Secondary – Based on an assumption that each pupil would take 10 GCSEs.

**Education and Curriculum ICT** – Based on 05/06 outturn figures, adjusted for inflation.

**Admin Resources** – Based on 05/06 outturn figures, adjusted for inflation.

**Premises Costs** – Based on 05/06 outturn figures, adjusted for inflation.

Having agreed the basis of the calculation, and the average class sizes that would be used, the group discussed the next stage of the process.

It was important that the group have an opportunity to see what affect the changes that had just been agreed would make. It was agreed that further work would be undertaken and that the School Budgets Working Group would meet before the full Forum meeting that was scheduled for 8 May 2007. The meeting of the full Forum would begin at 10.00am (rather than the usual 9.30am) to allow the group to meet immediately before that Forum at 8.45am.

A non AWPU based funding formula had also been produced and the group had a brief look at that. This proposal 'tidied up' the current formula and it was suggested that it was used to present an alternative example but that it would be emphasised that this model had not been debated at length.

#### **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 Monday, 11 June 2007. The meeting would be held at Newton Rigg, Penrith and would begin at 9.30am.

P&R/NJS  
April 2007