

# The KIRKLEES SCHOOLS FORUM

(Schools Funding Consultative Group)  
meeting held on **Friday 3rd July 2009**

**Item**

**4**

18.09.09

## Present:

|  |  |
|--|--|
| Julie Helm   | Nursery School Heads (1)                                     |
| Graham Altoft, Jenny Chamberlain, Carol Crossland, Gill Goodswen, Michelle Lee (Vice-chair), Diana Wilson  | Primary School Heads (6)                                     |
| Caroline Thompson  | Middle School Heads (1)                                      |
| Jackie Eames, Toby Eastaugh, Janet Tolley  | High School Heads (4)  |
| Philip Gibbins   | Special School Heads (1)                                     |
| Jo Bailey-Taylor (NASUWT), Gillian Collins (ATL), Sarah Ellis (pre-School Learning Alliance), Howard Roberts (NUT)   | Non-school members (6)                                       |
| Angela Farmer (Senior Finance Officer (Resources & Support)<br>Warwick Firmin (School Funding Strategy Manager, R&S); Clerk<br>David Gearing (Financial Delegation Manager, R&S); Minute Clerk<br>Rosemary Gibson (Acting Head of Resources & Support) | Kirklees Children & Young People Service Officers in Support |
| Paul Scrimshaw (KPH)   | Observers  |

## 1. Apologies for Absence

Christine Spencer (KSHS)[Forum Chair, Michelle Lee acted as Chair for today's meeting], Kath Benetis (KPH observer) and Julie Bowdidge (Principal Improvement Manager, Learning Service)

## 2. Minutes of the meeting held on 12 June

The minutes were agreed to be a true record of the meeting.

## 3. Matters arising from meeting 12 June

### 3.1 Allocation of the Schools Reorganisation Budget [minute 3.1 of the 12 June meeting]

An analysis of how the £280k Schools Reorganisation budget was used during 2008-09 was considered by the meeting.

- Apart from £38k used towards central salary and travel costs, the remainder has been allocated to support schools (and staff) affected by the Schools for the Future proposals.
- £50k was committed to relevant training/CPD for staff most immediately affected by the proposals, eg conversion courses to either a primary or secondary specialism for middle school teachers.
- A sum of £41k was allocated amongst the eleven North Kirklees primary schools affected by the proposals to free up additional time for staff to spend on planning for becoming full-age range primary schools and, where relevant, on developing related building design.
- £24k was shared equally amongst the four middle schools scheduled for closure under the proposals to free staff time for planning and CPD cover.
- £40k was shared equally by five North Kirklees high schools to support them in preparing their strategy for change and potential implementation plans. (These schools have

relatively simple change issues in comparison to the final grouping of high schools in the analysis).

- A further £85k allocated in varying amounts depending upon the nature of the reorganisation, to another group of five North Kirklees high schools to also prepare their strategies for change and implementation plans (where relevant).

Schools Forum welcomed the transparency of the information provided but wondered what processes will be used to decide the distribution of the Schools Reorganisation pot during 2009-10 and beyond. The emerging view was that the fund should be employed to support those schools most affected and soonest affected by the proposals. Margaret Parker, BSF Programme Director, has promised to take guidance on how the budget should be committed and the intention is that the issues are discussed at forthcoming BSF Strategy Board meetings where Head Teacher representatives will be present.

The biggest issue for schools affected by the proposals is how to ensure the retention of key members of staff as the changes loom – the middle schools in particular have real concerns in this area. There was broad agreement around the table that the way to retain staff was not by paying them more in the interim via measures such as recruitment & retention allowances and 'golden handcuffs'. Better by far to give affected staff reassurance via the HR framework protocols. There will be no blanket approach to the issue of staff retention and there is no specific funding available to deal with the costs. Rosemary reported good 'sign-up' to the HR framework and she agreed to draft a note on staff retention issues for those affected.

The BSF Strategy group will work up a proposal for deployment of the School Reorganisation budget in 2009-10 to bring back to Forum. The reorganisation budget will also need to be considered as a budget issue for 2010-11 as the BSF programme begins to pick up speed.

### 3.2 School Excess Balances [minute 3.2 of 12 June]

The excess balance sub-group of Schools Forum will meet to consider the evidence provided by identified schools before the end of the current term. The sub-group will then report its findings back to Forum early in the Autumn. There are currently only four schools (two primary, one middle and one high school) still to finalise their response.

At this point copies of the Audit Commission's summary report 'Valuable Lessons – improving economy and efficiency in schools' was circulated. One of the recommendations in the report is that "*the DCSF should consult on more effective measures to reduce and redistribute school balances*". It was suggested that the Schools Forum revisit the Audit Commission report at the next meeting.

### 3.3 Broadband Refresh [minute 4b of 12 June]

It was reported that the £306k Harnessing Technology funding has now been credited to school accounts. A contra entry will be performed some time during the Autumn Term.

## 4. Dedicated Schools Grant (DSG) 2008-09 Issues

The DCSF has at last confirmed the final Dedicated Schools Grant figure for 2009-10. In putting together the budget figures for 2009-10 officers had assumed a working figure of £249.476m. The figure now confirmed by the DCSF is £249.965m, higher by £489,000 due to final pupil number figures being slightly higher than anticipated. Of the £489,000 increase, £33,000 needs to be diverted to the Nursery Education Funding budget in response to an 8fte rise in nursery pupil numbers. This leaves £456,000 uncommitted funds in 2009-10 to add to the £500,400 net underspend carried forward from the 2008-09 DSG account. The combined sum of £956,400 is therefore available to address the cost of commitments that Forum agrees to roll forward into financial year 2009-10.

### 4.1 School-specific Contingency

It was reported last time that a sum of £721k should be considered for roll forward within the school-specific contingency budget. This figure was comprised of three separate amounts - **£133,000** relating to **outstanding Single Status costs within the Catering Service**, £350k in respect of specific underspends against the SEN/BESD Development Plan and £238k relating to FRS17 pension adjustments to be paid out in 2009-10. Last time the Schools Forum requested

further supporting information for the SEN/BESD proposal and officers agreed to recheck the commitment needed from the FRS17 monies. An updated SEN/BESD proposal is considered at 4c below. More detailed work on the **FRS17 commitments** to be triggered by payments made at the Single Status implementation date of 1 June 2009 has seen the original sum of £238k now replaced by a reduced commitment figure of **£178,000**.

#### 4.2 Head Teacher Wellbeing

Constituent groups were asked to feed back their positions on the proposal for the Head Teacher Wellbeing Service to roll forward it's underspend of £14,500 into 2009-10.

Kirklees Primary Heads (KPH) – the vast majority of schools at the KPH meeting favoured a repayment of the £14,500 back to the schools buying into the service. This would then reduce the cost of buying into the service for the current financial year.

Kirklees Special School Heads (KSSH) – asked a deeper question about protocols for dealing with underspends declared by traded services that are able to generate income in excess of that provided by simple buy-back processes. Should the service be allowed to simply carry funds forward automatically or should the issue always be referred to Schools Forum for decision?

Kirklees Middle School Heads (KMSH) – were happy to accept the view that the money should be returned to the sectors contributing the base funding and those high schools which had bought into the service on an individual basis.

[Kirklees High School Heads abstained from the debate as the base budget provision for HT Wellbeing was created by contributions from all school sectors save the high schools].

Agreed: to roll forward the **£14,500 HT Wellbeing underspend** to redistribute the funds amongst the schools which contributed to the funding of the service during 2008-09.

#### 4.3 SEN/BESD Development Plan

A revised proposal and further information was considered by the meeting, the effect of which is to lower the requested roll forward commitment from £350k to **£282,750**.

The revised plan is as follows: -

|   | £       |
|---|---------|
| Summer Term 09 funding for the late start in Secondary and Special Nurture Groups | 52,000  |
| Exclusion & Reintegration Service rental at CC Woodhouse                          | 26,000  |
| Holmfirth High consultancy  | 5,250   |
| Partial secondment of ETHOS staff to the usion Service                            | 18,000  |
| Project Leader to work alongside Lynn Nickson                                     | 50,000  |
| Revised formula for the Turnaround project (incl one-off severance)               | 21,500  |
| Anti-bullying strategy work   | 10,000  |
| Building costs re Bradley Nursery building conversion to Primary PRU, est         | 100,000 |

The building costs at the Bradley site are a bit of an unknown at this stage. Should the costs fall within the £100,000 set aside the balance would be returned to general funding.

#### 4.4 KS4 Alternative Provisions / Pupil Retention Grant

The rollover amount in question is **£253,000**. The underspend is almost wholly linked to temporary loss of alternative KS4 provision places during 2008-09 – the Pathways project at Huddersfield College, loss of places offered by Dewsbury College, delays in the availability of new provisions (New Directions College, the Brian Jackson College of Open Learning and the Construction for Yr11 Academy have also suffered delays in getting up and running). The rollover is needed to help address the full-year pattern of new and existing provisions and the higher cost per placement of some of the replacement provisions.

KHSH representatives could not understand, if the service had had a reduced number of places available to it during 2008-09, why high schools were not being reimbursed against the pupil

retention grant charges levied against individual schools when their students are allocated an alternative provision placement. If some places were not available does this mean that some students were not actually provided with alternative tuition last year?

Generally, the meeting felt that more information was needed before a decision could be reached. What relationship does the underspend have to the PRG charges? Figures are needed to back up the contention that the full-year pattern of new provision and the set-up costs mentioned require the full re-direction of the £253k?

#### 4.5 Summary of the position reached

Because further information has been requested about the KS4 AP/PRG underspend, no final decisions about rollover have yet been made. However, to place things into context against the £956,400 funds available, the following commitments could be agreed:-

|  | £                |
|--|------------------|
| Catering Service Single Status provision           | 133,000          |
| FRS17 Pension costs provision                      | 178,000          |
| SEN/BESD Development Plan                          | 282,750          |
| Head Teacher Wellbeing Service                     | 14,500           |
| DSG Early Retirements                              | 9,500            |
| Sickness Insurance Cover Scheme                    | 208,700          |
| KS4 Alternative Provisions / Pupil Retention Grant | <u>253,000</u>   |
| <b>ROLLOVER TOTAL</b>                              | <b>1,079,450</b> |

This total exceeds the available funding by £123,050. If this was to be the position reached with the Schools Forum it would be proposed that recognition be made that there is a link between the underspend presented by the insurance cover scheme and the overspend showing against the 2008-09 Protection of Employees account (+£122,800). The deficit here is due to the supernumerary placement on a temporary basis of individual teachers at a school other than their own to assist their return to work following a period of long-term illness. It is logical to assume that the sickness scheme would have incurred additional costs had the Protection arrangement not stepped forward in such cases. [Should the two arrangements be more formally linked in future?] The Schools Forum would propose that the £123k gap be closed by reducing the sickness insurance rollover figure in proportion to membership of the long-term teacher absence insurance scheme. This adjustment could not include the small number of non-member schools who would be billed for their proportionate share of the £123k gap.

[The need for this action would be moderated or removed entirely should a lower rollover total be approved in the event].

#### 5. Consultation: Schools Forum (England) Regulations 2009

The meeting considered the proposed 2009 amendments to the Schools Forum regulations. The main changes are to do with academies and non-school membership. It is proposed that local authorities with academies in their area must have representative members from the academies on their Schools Forum. (Previously, such “delegates” could only have observer status). The regulations will also make it a requirement that a Schools Forum has to have non-school members (previously this was optional. This also meant that a Forum did not have to have 14-19 and PVI sector representatives if it did not have any non-school members!). The Dept is further consulting on whether to have locality-based Forum representation as opposed to the current membership constructed proportionately to the number of pupils in each sector. There is also an idea expressed that the regulations should be amended to strengthen the position of the PVI sector to avoid the single funding formula delivering funding to them at a level that means the local authority would be unable to meet its duties of securing sufficiency and improving outcomes.

The collective views of the Schools Forum to be reported back to the DCSF were as follows:-

- There is no need to amend the regulations to strengthen the PVI position – the consultation processes around the new single funding formula are seen to be robust enough to avoid the situation described.
- The Forum did not see how locality-based representation would work or be an improvement upon the current system of representation. Forum representatives always take the issues at hand back to their constituent groups so the consultation reaches much deeper than a sectoral or locality level anyway.

W.Firmin will communicate the views of Kirklees Schools Forum to the DCSF.

## **6. Any other business**

### **6.1 Launch of the new Schools Recruitment Service**

The Dept for Children, Schools and Families (DCSF), in partnership with Tribal, is to launch a new on-line Schools Recruitment Service. The aim is for this facility to speed up recruitment processes for schools and to give schools a more cost-effective option than advertising in the national press. It is understood that the majority of local authorities will sign up for the scheme. There is an initial registration fee of £4,000 to pay in 2009-10 but there is some grant subsidy available towards the cost. Kirklees intends to register with the service immediately and gather more information about how the scheme will work. Head Teacher groups will then be fully briefed.

### **6.2 Outgoing Schools Forum members**

A vote of thanks was given to Jenny Chamberlain and Gill Goodswen as both are stepping down from membership of the Schools Forum after today's meeting. Their long-standing commitment to the Schools Forum down the years is much appreciated.

### **Date and Time of next meeting**

Friday 18 September 2009, 9:30am to 11:30am at the Deighton Centre, Huddersfield