

# The KIRKLEES SCHOOLS FORUM

(Schools Funding Consultative Group)  
meeting held on **Friday 24th April 2009**  
The Old Court Room, Huddersfield Town Hall

## Present:

Julie Helm	Nursery School Heads (1)
Graham Altoft, Jenny Chamberlain, Carol Crossland, Michelle Lee (vice-chair), Gill Goodswen, Diana Wilson	Primary School Heads (6)
Caroline Thompson	Middle School Heads (1)
Jackie Eames, Christine Spencer (Chair), Janet Tolley	High School Heads (4)
	Special School Heads (1)
Jo Bailey-Taylor (NASUWT), Pat Colling (Kirklees Governors Association), Gillian Collins (ATL), Sarah Ellis (pre-School Learning Alliance), Howard Roberts (NUT)	Non-school members (6)
Julie Bowdidge (Principal Improvement Manager, Learning Service) Angela Farmer (Senior Finance Officer, Resources & Support) Warwick Firmin (School Funding Strategy Manager, R&S); Clerk David Gearing (Financial Delegation Manager, R&S); Minute Clerk Carole Hardern (Finance Manager, Children & Young People Service) Margaret Swinden (Finance Manager, Resources & Support) Karen Worrall (Head of Localities)	Kirklees Children & Young People Service Officers in Support
Kath Benetis and Paul Scrimshaw (shadowing KPH representatives)	Observers

## 1. Apologies for Absence

Mark Ayres (Resources & Support) and Philip Gibbins (KSSH).

It was noted that Mark Ayres will shortly be leaving the service. Rosemary Gibson is to become acting Head of Resources & Support for the immediate future. The Children's Management Team is to consider who will succeed Mark as their representative at future Schools Forum meetings.

## 2. Minutes of the meeting held on 27 February 2009

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

## 3. Matters arising from meeting 27 February 2009

### 3.1 Insurance Cover Scheme Refund [minute 3.3 of the 27 February meeting]

This will be considered as part of a wider agenda item on the final 2008-09 DSG outturn position at the June Forum meeting.

### 3.2 Correspondence from report to all Head Teachers [minute 5 of 27 February]

Officers reported that the primary school in question had visited Oldgate House to draft their 2009-10 budget proposal and managed to balance with no particular difficulty.

### 3.3 Correspondence received from UNISON [minute 8.1 of 27 February]

This will be considered as part of the annual review of the Schools Forum constitution now scheduled as an agenda item for the 15 May meeting.

### **3.4 Excess Balances held by Schools [minute 8.3 of 27 February]**

Officers confirmed that all schools were e-mailed to remind them about the rules and procedures governing the surplus balance positions declared at year end.

It was asked whether the allocation to schools of the final element of 2008-09 Extended Schools funding so late in the financial year would increase the declared schools balance total. Providing schools have accounted for the allocation within their Standards Fund account (as is the intention) then the allocation will not affect the calculation for the excess balance threshold which only applies to the Individual Schools Budget (ISB) balances not to Standards Fund. Assurances were given that the equivalent 2009-10 Extended Schools allocations would be made as early as possible in the new financial year.

## **4. Feedback from Heads meetings**

### **4.1 KPH views on KS2 Music Grant proposal**

Kirklees Primary Heads (KPH) had resolved to accept the proposed distribution of the KS2 Music Grant but for 2009-10 only. This means that instead of all KS2 provider schools receiving an equivalent cash allocation, the method will now allocate an amount per pupil on top of a reduced block grant sum. KPH want to revisit the methodology in time for the 2010-11 allocations, having kicked around some ideas at their meeting. Inevitably, there is a tension between ensuring the smaller schools receive a workable level of funding and ensuring that the larger schools receive an adequate level of funding.

### **4.2 The Kirklees High School Heads (KSHS) meeting raised 3 issues: -**

#### **4.2.1 Staff Retention in schools affected by the Schools for the Future proposals**

The Middle School sector presents the most immediate cause for concern as the North Kirklees Middles are the first to be scheduled for closure under the Schools for the Future plans. It is known that each of the four schools affected has been allocated a sum of £6,000 from the central 'Schools Reorganisation' budget to start to address the issue of retaining staff and maintaining standards in schools that are due to close. The issue of "golden handcuff" payments to retain some staff was seen to be problematical – how to fairly decide who should receive such payments and what that payment should be? There is also the issue of CPD / retraining of some teaching staff to ensure they are prepared for moves to either primary or secondary schools when the time comes. It was noted that some of the First schools affected by the proposals had also received some money for CPD / change management planning during 2008-09.

Early next month there is a BSF Strategy Board meeting to consider how to support those schools most affected by the changes. The dialogue on these issues is crucial to the BSF processes and there needs to be a properly thought through system of support for the implications of the changes. It was requested that Margaret Parker (BSF Programme Director) be asked to brief the Schools Forum on spending plans for the School Reorganisation budget and to report progress on how the staffing issues resulting from the BSF programme will be addressed.

#### **4.2.2 Disadvantage Subsidy Funding allocated to two High Schools**

Concerns were expressed about a sum of £286k of grant funding reported to be recently allocated to two Dewsbury High Schools. It was asked why the matter hadn't been through Schools Forum by way of consultation to explain why the two schools in question were chosen.

Karen Worrall, Head of Localities responded, explaining that the funding in question has arisen out of pilot work taking place in twelve other Local Authorities. The amount Kirklees has received came with a two-week turnaround period. The funding is targeted to economically disadvantaged pupils, through their school, to provide them with access to extended schools activities. The funding comes with expectations that certain outcomes will be delivered and it is likely at some stage that the initiative will be rolled out more widely by the Government, possibly on a formula basis. The two Dewsbury Schools were chosen to pilot the arrangements in Kirklees to reflect the new Council administration's view of Dewsbury as a priority area for additional support. To support the initiative, current Council resources have been redirected to drive a project team to develop pilot models for the activities. There is a need to commission some extended school activities to begin delivery this July.

It was pointed out that Aim Higher is also engaged in commissioning activities for a similar purpose. Couldn't their work be built upon instead? The wider roll-out of the initial funding will also cover primary schools and children who are not on school rolls so Aim Higher, which only deals with secondary pupils, could not really take the wider view.

There was some criticism of the decision to set up a new project team to deal with the new funding. It was stressed that the team will initially be focussed within the Dewsbury pyramid of schools and that external partners will need to be involved in developing the provision – the project is viewed as encompassing children from birth through to 19 so appropriate expertise within this range needs to be involved in the process. It was acknowledged that Schools Forum also needs to be involved in decisions about the wider roll-out of funding support. Helen Butler from the Extended Learning Service is leading the project team. Karen will ensure that Helen attends KPH and KSHS in the near future to provide further details about the project.

#### **4.2.3 Education Social Work Service**

The issue of whether the Education Social Work Service represents Value for Money for High Schools was raised again. Secondary Heads are still looking for funding to be devolved to them to be used to employ their own staff to improve attendance, behaviour etc.

### **5. Budget Updates**

#### **5.1 DSG 2009-10 Budget Share allocations**

When last considered by Forum, the 2009-10 DSG budget strategy was expected to be in excess of £600k away from a balanced position – a situation which would have had to be redeemed by applying a general  $-(0.3)\%$  reduction to School Budget Share allocations. In the event, there was sufficient funding available to actually deliver a financial standstill position for schools rather than the expected cut. This proved possible because more pupils in total appeared across the various January 09 school censuses than had been originally forecast and the distribution of those pupils amongst the age bands was also in our favour (more primary pupils but fewer secondary freed up money within the Age-Weighted Pupil Unit budget).

#### **5.2 DSG 2008-09 Budget Monitoring Week 48**

The overall position has improved slightly from a forecast of £733k over in the week 44 monitoring report to £676k over at week 48. The main reason for the shift is an improvement in the Independent School Fees projected outturn by around £80k. This has been slightly offset by worsening overspends in the maternity leave and protection of employees accounts and a newly-identified problem in the school milk account.

It was asked whether the price for school milk could be fixed in advance for the whole of the financial year to avoid such problems in future. There were also comments made about the quality of the service being provided to some schools at the moment.

The Pupil Referral Unit overspends were commented upon. The meeting was reminded that much of the budget pressure here should not resurface in 2009-10 due to the budget adjustments approved by Schools Forum for the PRUs. The services provided also fall within the scope of the ongoing SEN Review so further developments may arise. The protocols for determining which establishment (the school, the PRU or both) individual pupils in differing circumstances should count against also need to be discussed and agreed for the future.

#### **5.3 Update on the Children & Young People Service Budget**

Carole Hardern, Group Finance Manager for the Children & Young People Service gave the meeting a verbal update on the ChYPS budget position.

When Mark Ayres briefed the Schools Forum last Autumn, the ChYPS budget was looking to make in excess of 7% of savings through to 2011-12 to fall within the planning totals. The Service submitted a balanced proposal to the Council before the turn of the year which contained some challenges and proposed several major service reviews. The change to the political administration in Kirklees gave a little more room for manoeuvre within a Council Tax rise of 3.5%. This should generate an additional £3m for ChYPS over the three year period and this has permitted the reinstatement of some of the originally proposed cuts (to Localities, clothing grants and school transport).

The Council's focus has been very much upon protecting Kirklees residents from the effects of the deepening recession. There was also modest investment in safeguarding issues and the creation of a schools energy officer post. The Council has also made further significant contributions to the costs of the BSF project and to the outcome of the PPP bench-marking of costs exercise.

Even though the eventual picture was somewhat better than anticipated, there are still some significant risks and unfunded pressures circling the ChYPS budget. The need to review services and ways of working remains and there are additional efficiency targets to meet. Schools will need to engage with the service reviews which directly affect them.

There was general welcome for the briefing. It is important that Schools Forum keeps up to date with issues facing the ChYPS service and the Council. Some Schools Forum members suggested that there may be a case for some elected members to give the Schools Forum their perspective on the budget issues facing the Council.

Carole agreed to provide the Schools Forum with termly updates on the ChYPS budget position.

## 6. Update on Standards Funds

Julie Bowdidge provided the meeting with an update on various 2009-10 Standards Fund issues.

- The initial allocations notified to schools were the Schools Development Grant and grants in respect of Extended Schools (including sustainability), Specialist schools, Ethnic Minority Achievement and Harnessing Technology.
- During the year National Strategy grant funding will be released upon receipt of a spending plan.
- KS2 Music grant can now be released following the views KPH has reported back (see 4 above).
- Schools Lunch Grant allocations have still to be considered.

### 6.1 Extended Schools allocations

Concerns were again voiced about the tardiness of the Extended Schools allocations to schools from the 2008-09 Area-Based Grant budget. It was reported that the 2009-10 allocations will be released to schools in the next couple of weeks on the basis of the original plan submitted by each school.

### 6.2 Making Good Progress grant

Standards Fund 1.5 'Making Good Progress' grant has three elements: -

- 10 hours of one-to-one tuition (and two hours of tutor planning and liaison time) for identified pupils
- payments to schools on a per-pupil-tutored basis
- ring-fenced central funding for the LA to recruit and train tutors, to liaise with head teachers and for quality assurance, monitoring and evaluation of the tutoring programme.

**Primary Schools.** Pilot one-to-one tuition allocations have been made to 32 schools to cover 9 pupils in Year 5 or Year 6. The schools were selected from Index of Multiple Deprivation data and were those having more than 20% of pupils in the worst 10% IMD banding. From September 2009 the majority of schools in Kirklees having KS2 provision will receive an allocation for one-to-one tuition. The allocation will be based upon pupil progress data with a focus upon conversion rates from the end of KS1 to KS2, end of KS2 results and deprivation measures.

**Secondary and Middle (KS3) schools.** There are two funding streams. For KS3, funding for tuition has been allocated in blocks of 13 pupils. 14 schools have received allocations based on 39 pupils, 15 schools based on 26 pupils and 2 schools for 13 pupils. 12 hours of tutor time is allocated per pupil. The selected pupils are those which -

- have entered the key stage below age-related expectations
- are falling behind trajectory during the latter stages of the Key Stage
- are not on trajectory to make two levels of progress per Key Stage
- are Looked-after Children who would benefit from such support

The allocation for KS4 pupils is for schools supported through the National Challenge initiative. In Kirklees, 5 schools have received an allocation based on 18 pupils, 3 schools an allocation based on 12 pupils and 2 schools an allocation for 6 pupils.

The allocations include £20 per tutored pupil to cover any additional costs incurred by schools for administration time or for teacher-tutor liaison.

## **7. Sure Start Grant Funding**

In 2008-09 the Local Authority received Sure Start Grant funding totalling £12.3m to support Children's Centres and a range of services which support children and families. The grant is fully ring-fenced to purpose and any uncommitted funds against the annual allocation are clawed back by the Government. In addition, the retained DSG budget also makes a contribution (of £560k) to meet Kirklees Early Years Service (KEYS) costs relating to the provision of early years education and children's centres based in schools. In 2008-09, in order to maximise the amount of Sure Start grant claimed, some of the costs of the KEYS service have been moved across to the grant account. This means there is now a projected underspend of £200k within the DSG portion of the KEYS budget.

The Schools Forum is asked to consider rolling the £200k forward into 2009-10 to be used to temporarily extend the capacity of existing Family Intervention Projects (FIPs) to reach another 25 Kirklees families with children where the family is in need of intensive support to reduce behavioural problems and maintain their homes. This proposal responds to the concerns of schools which perceive they have limited support for pupils and families who are causing concern. The FIP programme is already established and provides intensive support to around 28 families per year. The Council has recently agreed to extend the capacity to deal with 50 families per year. In addition, the Localities Service has successfully bid for funding to enable support to be given for a further 25 families within a pyramid of schools. The rollover of the 2008-09 underspend would enable intervention support work to take place with an additional 25 families in a second pyramid of schools. It would also pay for an increase to the level of direct training and advice available to schools about Safeguarding and Child Protection issues.

The issue for the Schools Forum is whether to use the £200k underspend to offset the overall retained-DSG overspend at the end of 2008-09 or to accept the proposal and increase the level of DSG overspend to be made good. There was comment about whether the proposal represents good value for money – what evidence is there that the FIP approach actually improves outcomes for the children, families and schools it deals with? K Worrall agreed to circulate a report detailing the impact of the programme upon families / children dealt with recently. It was also questioned why there is a need to commit funding to bring an additional 25 families into the programme when steps are already in place anyway to increase the original provision from 28 families to 75.

It was agreed that the proposal should go back to constituent group meetings for consultation and feedback will be reported to the next Schools Forum meeting on 15 May.

## **8. Nursery Funding Report**

The meeting considered a report to update the Schools Forum on progress being made towards the implementation of a Single Funding Formula for Nursery-aged children at April 2010.

The report sets out how the current funding system for Maintained Nurseries and for Private, Voluntary and Independent (PVI) settings works via the Dedicated Schools Grant and the (currently) additional Standards Fund Pathfinder Grant (to pay for the increase to the free entitlement from 12.5 to 15 hours per week).

The paper explains the initial modelling work that has been done based around the cost analyses of different types and sizes of provision. Appendices to the report showed quite detailed cost models for a maintained Nursery Unit, a maintained Nursery School, a PVI Nursery setting and for day care and childminder provisions.

Because of the complexity of the issues and the information presented and the short amount of time left for discussion at the meeting, Schools Forum members were asked to take away and read the report to inform further discussion at the May 15<sup>th</sup> meeting.

## 9. Agenda for next meeting 15 May 2009

Feedback from constituent groups on the Sure Start funding proposal (additional family support provision)

Single Funding Formula for Nursery-age children - progress report

Review of the Constitution of the Schools Forum – a copy of the document as amended July 2008 was distributed at the meeting.

Draft Schools Forum meetings calendar for 2009/10 – a draft meetings calendar for next Academic Year was circulated to the meeting. Constituent group meeting dates need to be confirmed with any problems with the proposed Schools Forum dates to be raised at the next meeting.

## 10. Any other business

No other business was raised.

## Date and Time of next meeting

Friday 15 May 2009, 9:30am to 11:30am at the Deighton Centre, Huddersfield

# Auditors want £2bn surpluses to be redistributed

The TES on 1 May, 2009 | **By: Richard Vaughan**

The government's spending watchdog has demanded schools hand back the Pounds 2 billion of surplus cash that has been built up over the past nine years.

A National Audit Office report released yesterday called for the Department for Children, Schools and Families to "encourage" local authorities to claw back school surpluses in order for them to be redistributed in line with local need.

During 2007-08, Pounds 250 million was given to local authorities but not spent by schools, and the overall surplus has tripled over the past nine years, or 6 per cent of total revenue funding for schools.

Edward Leigh, chair of the Public Accounts Committee, said: "Parliament does not give local authorities money to hold it for a rainy day; they are given it to spend on today's children in schools."

But the announcement will be given an icy reception by many headteachers, particularly after last week's Budget, which forecast a bleak future for schools.

Many heads are expected to turn to their surpluses once the Government starts to make drastic spending cuts in an attempt to repay public debt.

But according to the F40 Group, which is made up of representatives from the 40 lowest-funded authorities, local councils do not have the power to ask for surplus money back from schools.

Ivan Ould, vice-chair of the F40 Group, told The TES that any decision on matters around funding is up to the schools forums.

"It is the Government who set up the schools forums in the first place," he said. "They have taken the responsibility away from local authorities and into the hands of headteachers."