

# AGENDA

## Herefordshire Schools Forum

Date: **Friday 3 December 2010**

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Time: **9.30 am**

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Place: **Council Chamber, Brockington, 35 Hafod Road,  
Hereford HR1 1SH**

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Notes: *Please note the **time, date and venue** of the meeting.*

For any further information please contact:

**Pete Martens, Democratic Services Manager**

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If you would like help to understand this document, or would like it in another format, please call Pete Martens, Democratic Services Manager on 01432 383408 or e-mail [pmartens@herefordshire.gov.uk](mailto:pmartens@herefordshire.gov.uk) in advance of the meeting.

# Agenda for the Meeting of the Herefordshire Schools Forum

## Membership

<b>Chairman</b>	<b>Mrs JS Powell</b>	
<b>Vice-Chairman</b>	<b>Mr NPJ Griffiths</b>	
	<b>Mr J A Chapman</b>	Church of England
	<b>Mr P Burbidge</b>	Roman Catholic Church
	<b>Mrs S Catlow-Hawkins</b>	Secondary Schools Headteacher (Vol. Aided)
	<b>Mr N O'Neil</b>	Secondary Schools (Community)
	<b>Mrs S Woodrow</b>	Secondary Schools
	<b>Dr M Goodman</b>	Secondary Headteachers
	<b>Mr S Pugh</b>	Primary Schools Headteacher (Community)
	<b>Rev D Hyett</b>	Voluntary Aided Primary School
	<b>Mrs J Cecil</b>	Primary Schools Headteacher (Vol. Controlled)
	<b>Mr P Box</b>	Primary Schools
	<b>Mr S Matthews</b>	Primary Headteachers Small Schools
	<b>Ms T Kneale</b>	Primary Schools
	<b>Mrs J Baker</b>	Secondary School Governor
	<b>Mrs K Rooke</b>	Special School Governor
	<b>Mr T Edwards</b>	Primary School Governor
	<b>Mrs S Bailey</b>	Special Schools
	<b>Mr J Docherty</b>	Secondary Schools
	<b>Mrs A Pritchard</b>	Teaching Staff Representative
	<b>Mr M Harrisson</b>	Teacher Representative
	<b>Mr J Godfrey</b>	14-19 Representative
	<b>Mr A Shaw</b>	14-19 Representatives
	<b>Mrs A Jackson</b>	Early Years Representative
	<b>Mrs R Lloyd</b>	Early Years
	<b>Mr P Barns</b>	Pupil Referral Unit
	<b>Mr J Sheppard</b>	Academies
<b>Non Voting</b>	<b>Councillor PD Price</b>	Observer
	<b>Councillor WLS Bowen</b>	Observer

## GUIDANCE ON DECLARING PERSONAL AND PREJUDICIAL INTERESTS AT MEETINGS

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In considering the declaration of an interest, a Member of the Forum should apply the following test: would a member of the public, knowing the facts of the situation, reasonably think that the member might be influenced by the interest?

A prejudicial interest would include the situation whereby a proposal uniquely affects either a school at which they are a head teacher/governor or which their children attend.

Any member who requires advice/guidance concerning declarations of interest or any other issue concerning the Forum should contact the Clerk in the first instance on telephone number 01432 260248.

## AGENDA

	Pages
<b>1. APOLOGIES FOR ABSENCE</b> To receive apologies for absence.	
<b>2. NAMED SUBSTITUTES (IF ANY)</b> To receive any details of Members nominated to attend the meeting in place of a Member of the Forum.	
<b>3. DECLARATIONS OF INTEREST</b> To receive any declarations of interest by Members in respect of items on the Agenda.	
<b>4. CHAIRMAN'S ANNOUNCEMENTS</b> To receive any announcements from the Chairman.	
<b>5. MINUTES</b> To approve and sign the minutes of the meeting held on 1 October 2010.	1 - 4
<b>6. STATEMENT ON COMPREHENSIVE SPENDING REVIEW AND OTHER ANNOUNCEMENTS</b> To receive a verbal update about the review. Supporting information will be tabled at the meeting.	
<b>7. BUDGET WORKING GROUP</b> To receive a report on the meeting of the Budget Working Group held on 5 November 2010.	5 - 8
<b>8. PROGRESS REPORT FROM THE WIGMORE AND BROMYARD CLUSTERS ON THE IMPACT OF THE NATIONAL SCHOOLS LEADERSHIP COLLEGE PILOTS</b> To inform the Forum about progress on the projects for the Wigmore and Bromyard Clusters and to consider key implications for any similar projects.	9 - 16
<b>9. LATE ITEMS/ANY OTHER BUSINESS</b> To consider any issues raised as either a late item or any other business.	
<b>10. WORK PROGRAMME</b> To consider the Forum's work programme.	17 - 20
<b>11. DATE OF NEXT MEETING</b> Monday 31st January 2011 <u>at 1:00 pm</u>	



# **HEREFORDSHIRE COUNCIL**

**BROCKINGTON, 35 HAFOD ROAD, HEREFORD.**

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HEREFORDSHIRE COUNCIL

**MINUTES of the meeting of Herefordshire Schools Forum held at Council Chamber, Brockington, 35 Hafod Road, Hereford HR1 1SH on Friday 1 October 2010 at 2.00 pm**

**Present:** Mrs JS Powell (Chairman)  
Mr NPJ Griffiths (Vice Chairman)

Mr JA Chapman, Mr P Burbidge, Mrs S Catlow-Hawkins, Mr S Woodrow, Vacancy, Mr S Pugh, Rev. D Hyett, Mrs J Cecil, Mr S Matthews, Ms T Kneale, Vacancy, Mrs J Baker, Vacancy, Mr TE Edwards, Mrs S Bailey, Mrs E Christopher, Mr J Docherty, Ms A Pritchard, Mr M Harrisson, Mr J Godfrey, Mr A Shaw, Mrs A Jackson and Mrs R Lloyd, Mr P Barnes, Dr M Goodman, Mrs K Rooke, Mr J Sheppard.

**In attendance:** Councillors PD Price and WLS Bowen

**17. APOLOGIES FOR ABSENCE**

Apologies were received from Mr P Box and Mr N O'Neil.

**18. NAMED SUBSTITUTES**

There were none.

**19. DECLARATIONS OF INTEREST**

There were none.

**20. CHAIRMAN'S ANNOUNCEMENTS**

The Chairman welcomed Mr P Barns, Dr M Goodman, Mrs K Rooke and Mr J Sheppard to their first Schools Forum meeting.

**21. MINUTES**

It was noted that the first words of Minute number 13 resolution (a) should read "paragraph 11 (b) v", rather than "11 (a) v". An amended version of the draft Minutes had been prepared for signature by the Chairman.

**RESOLVED: That the Minutes of the meeting held on 9 July 2010 be confirmed as a correct record and signed by the Chairman, subject to recording that Mrs J Cecil and Mr J Chapman had been present.**

**22. LATE ITEMS/ANY OTHER BUSINESS**

There were none.

**23. CONSULTATION ON SCHOOL FUNDING 2011-12 - INTRODUCING A PUPIL PREMIUM**

The Schools Finance Manager presented a report inviting the Forum to approve the response to the Department for Education (DfE) school funding consultation paper on the "Introduction of a Pupil Premium and Arrangements for Distributing Dedicated Schools Grant (DSG) for 2011-12".

The report set out the questions from the consultation paper together with a draft response. The Schools Finance Manager explained the options outlined in the consultation paper, the rationale for each of the proposed responses and invited comment.

The Forum discussed the responses and supported them as drafted. It was noted that the Interim Director of Children's Services was due to meet the Parliamentary Under Secretary of State for Schools shortly and it was requested that the Chairman be authorised to agree any changes to the response that were considered appropriate in the light of any new information arising from that meeting.

**RESOLVED: That the proposed response as set out in the report be approved for submission to the Secretary of State for Education, subject to the Chairman being authorised to agree any changes to the response considered appropriate in the light of any new information received.**

#### **24. EARLY YEARS FINANCE REPORT**

The General Inspector for Early Years presented a report providing the Schools Forum with an overview of the central funding for Early Years in Herefordshire in 2010.

The report proposed a review of the early years finances in January 2011 following guidance from Government on the allocation of Sure Start Grant and statutory requirements for early years provision.

It was noted that all Dedicated Schools Grant spending on early years (except salary costs) in 2008,2009 and 2010 had been offset by an underspend on the Sure Start Grant at the end of each financial year. Clarification was sought and provided on the operation of the Sure Start grant.

The interim Director of Children's Services commented that early years finances would need to be considered in the context of the Government's Comprehensive Spending Review and any subsequent ministerial announcements. He hoped that it would be possible therefore to report to the Forum in December, although the timescale may well be tight, necessitating a paper being tabled at the meeting.

**RESOLVED: That the use of early years finances be reviewed in the light of the Comprehensive Spending Review and any other announcements by the Government and their potential implications.**

#### **25. EFFICIENCY SAVINGS IN SCHOOLS**

The Schools Finance Manager presented a report considering further work to develop options to help Herefordshire schools make efficiency savings according the Department for Education advice set out in "Investing for the future, protecting the front line".

The report stated that in the next few years most schools would need to need to make efficiency savings in order to balance the budget due to predicted reductions in funding. Savings had been suggested by government in the following four areas: procurement (10%), back office costs (10%), energy (5-15%), and collaboration and federation (a global sum of £350m).

The Property Operations Manager commented on the procurement of catering, grounds maintenance and cleaning services. He explained the tendering process and the complications and timescales involved in letting contracts above £134,000, notice of which was required to be placed in the European Journal. He also commented on the use of approved contractors which enabled Property Services to ensure contractors were compliant with legislative requirements, so offering protection to schools.

The majority of schools purchased energy supplies through West Mercia Supplies (WMS). The Property Services Manager reported that he considered WMS's rates, which were monitored by Property Services, to be very competitive. He highlighted that schools could analyse their energy usage via the WMS website.

He also commented on a number of invest to save initiatives such as special light fittings and controls of which Schools could take advantage. Such initiatives would normally generate a saving after a five year period.

In discussion the following principal points were made:

- Some concerns were expressed about WMS's billing arrangements. It had been suggested the Managing Director of WMS should be invited to address the Forum. Members of the Forum proposed that he should be invited to one of the scheduled meetings for all Headteachers.
- It was noted that the Wigmore Cluster had achieved an 8-10% saving on procurement on their grounds maintenance contract. However, it was suggested that the sum saved (£2,500) needed to be balanced against the costs of establishing the Wigmore and Bromyard Clusters (£100,000).
- That, on current prices, it was expected that it would take 20 years for a wind turbine to repay the investment in it.
- A member commented on the savings generated through use of the Government Procurement Card. The Schools Finance Manager commented that the intention was to trial the card with high schools to ensure that the scheme operated smoothly and then roll it out to the larger primary schools. Members of the Forum considered that the potential to achieve savings through use of the Card should be taken advantage of at the earliest opportunity and that the Procurement Card should therefore be made available to all schools and settings as soon as possible.

#### **RESOLVED:**

- That (a) a task and finish group, the Procurement sub-group, be established to investigate the potential to achieve procurement savings in schools and make recommendations to Schools Forum in mid-2011;**
- (b) progress reports be requested from the Wigmore and Bromyard clusters on the impact of the National Schools Leadership College pilots on school business management;**
- (c) the re-launch of the invest to save scheme be endorsed with a particular focus on energy savings;**
- (d) the Government Procurement Card should be made available to all schools and settings as soon as possible; and**
- (e) the Managing Director of West Mercia Supplies be invited to attend a scheduled meeting of all Headteachers.**

## **26. BUDGET WORKING GROUP**

The Schools Finance Manager presented a report on the recommendations from the Budget Working Group's meeting on 25 October.

### **RESOLVED:**

- That (a) **given the impending work of the Schools Formula Review Group, the Herefordshire schools funding formula is only amended prior to 2013/2014 to include the nationally prescribed formula amendments for the national pupil premium and the mainstreaming individual school grants into Dedicated Schools Grant; and**
- (b) **that further work on the social deprivation funding strategy be deferred pending the outcome of the Department for Education consultation on the National Pupil Premium.**

## **27. PERFORMANCE OUTCOME AGAINST EARLY YEARS SEN GRANT SPENDS**

The Early Years Consultant presented a report on the current position regarding additional funding to pre-school settings for children with significant specific educational needs and requested that the School's Forum continue to provide additional funding for pre-school settings for children with significant special educational needs.

**RESOLVED: That in principle the Schools Forum provide additional funding for pre-school settings for children with significant special educational needs at the 2010/11 funding level, provisionally and subject to review as part of the 2011/12 Dedicated Schools Grant settlement.**

## **28. WORK PROGRAMME**

The Forum considered its work programme.

It was noted that the Work Programme would be updated in consultation with the Chairman noting in particular the intention to report in December, if possible, on the Government's Comprehensive Spending Review and any subsequent ministerial announcements and their implications.

It was acknowledged that the dates of meetings in February and April 2011 would need to be rearranged.

## **29. DATE OF NEXT MEETING**

The Forum noted that the next meeting was scheduled to be held at 10.00 am on Friday, 3 December 2010.

The meeting ended at 3.20 pm

**CHAIRMAN**

<b>MEETING:</b>	<b>SCHOOLS FORUM</b>
<b>DATE:</b>	<b>3 DECEMBER 2010</b>
<b>TITLE OF REPORT:</b>	<b>REPORT OF THE BUDGET WORKING GROUP – 5 NOVEMBER 2010</b>
<b>REPORT BY:</b>	<b>LMS ACCOUNTANT</b>

**CLASSIFICATION:** Open

### **Wards Affected**

County-wide

### **Purpose**

To report on the Schools Forum Budget Working Group meeting on 5<sup>th</sup> November

### **Recommendation(s)**

**THAT Schools Forum notes the content of the report**

### **Key Points Summary**

- Refresh of membership of the Budget Working Group
- Comprehensive Spending Review and its impact on school budgets 2011/12
- Budget proposals 2011/12

### **Alternative Options**

- 1 There are no alternative options for consideration

### **Reasons for Recommendations**

- 2 To update Schools Forum on the work of the Budget Working Group

### **Introduction and Background**

- 3 The report gives an overview of what was discussed at the Budget Working group meeting.
- 4 Refresh of membership - Michael Goodman has replaced Chris Barker as a representative of HASH. As at 5<sup>th</sup> November the Primary Heads Forum meeting hadn't been held so no additional members representing primary schools were at the meeting.
- 5 Comprehensive Spending Review - The group discussed the content of the Department for

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Further information on the subject of this report is available from  
Louise Devlin LMS Accountant on (01432) 261859

Education press notice, together with slides prepared by Pearson (for an F40 group presentation) summarising the implications for schools.

6 Both documents provide a high level overview and it was felt that until more specific information on funding is released in early December it is impossible to plan effectively as there are too many uncertainties. The Pearson slides have been sent to all Heads for information.

7 Key points affecting 2011/12 budgets:

- Overall schools' budget increasing annually by 0.1% (increase includes Pupil Premium)
- Reduced ring fencing of funding – several grants historically paid through Standards Fund are to be delegated as part of the main school budget, increasing flexibility.
- Pupil Premium – being implemented from September 2011, targeting the most disadvantaged pupils. Premium will be calculated on Free School Meals indicators.
- Early Years – 15 hours a week of education for 3 and 4 year olds is being maintained (additional 2.5 hours previously funded through Standards Fund)
- Capital – Education capital budget being cut by 60%, mainly through scrapping of BSF. Effect on Devolved Formula Capital allocations is unknown.

### **School Funding 2011/12**

9 The group considered the models for the affordability of a good, fair and poor Dedicated Schools' Grant (DSG) settlement.

10 The estimated 2011/12 budgets issued in April, based on 1.9% DSG increase, 1% inflation and estimated 1% Minimum Funding Guarantee (MFG) are no longer affordable due to changes in the cost of rates. Given the changes to funding outlined in the Comprehensive Spending Review it is unlikely that an increase in DSG of this level will be achieved.

11 The fair settlement modelled increases funding by 1.5% and assumes that no inflation is applied to school budgets and uses an MFG of 0% or -1%. The model suggests that a fair settlement would be affordable if set on this basis.

12 A poor DSG settlement of 1% is unaffordable and would require a reduction in central and/or school budgets.

### **Budget Proposals 2011/12**

13 Factors traditionally causing budget pressures were discussed (see background papers - Draft School Budgets 2011/12) and the Group have asked that alternative options are developed once more information on funding is known, so that funding for pupils with the greatest need is protected as much as possible.

14 The amount of DSG that we are likely to receive is uncertain, and the treatment of grants previously distributed by other funding streams is unknown. Consequently there is insufficient information available to make any recommendations to Forum on how to treat specific formula factors which may cause pressures if a challenging settlement is received.

15 The group will be meeting again in mid December when better information on which to base recommendations will be available and will present to Forum again on 31<sup>st</sup> January. If there

has been insufficient time to consider how best to respond to changes in our funding before the end of term, draft school budgets may be delayed until the New Year.

## **Key Considerations**

16 None identified.

## **Community Impact**

17 None identified.

## **Financial Implications**

18 No decisions made on 2011/12 budgets so no financial implications at present.

## **Legal Implications**

19 None identified.

## **Risk Management**

20 None identified

## **Consultees**

21 None

## **Appendices**

None

## **Background Papers**

DfE Spending press notice

Pearson F40 CSR Briefing

Draft School Budgets 2011/12 report

DSG Financial Modelling 2011/12





<b>MEETING:</b>	<b>SCHOOLS FORUM</b>
<b>DATE:</b>	<b>1 NOVEMBER 2010</b>
<b>TITLE OF REPORT:</b>	<b>PROGRESS REPORT FROM THE WIGMORE AND BROMYARD CLUSTERS ON THE IMPACT OF THE NATIONAL SCHOOLS LEADERSHIP COLLEGE PILOTS ON SCHOOL BUSINESS MANAGEMENT</b>
Article 1:	BROMYARD CLUSTER INTERIM REPORT
Article 2:	WIGMORE CLUSTER INTERIM REPORT
<b>REPORT BY:</b>	<b>Head teacher, St Peter's Foundation Primary School, Head teacher Queen Elizabeth Humanities College (QEHC) and Head teacher, Wigmore High School</b>

**CLASSIFICATION:** Open

## **Wards Affected**

County-wide implications. Review based on Bromyard Cluster schools.

## **Purpose**

This interim review seeks to evaluate the effectiveness of the Bromyard Cluster School Business Manager (SBM) project to date and to consider key implications for any similar projects.

## **Recommendation(s)**

**THAT:**

- (a) **Within the Bromyard Cluster (from 1<sup>st</sup> November, *Education for Bromyard: a Cooperative Trust, EfB*) the six primary schools consider whether the School Business Manager project be embedded at the core of its Trust infrastructure and that QEHC should be a full partner;**
- (b) **In the broader local authority education structure this approach be considered as a potentially effective model of good administrative practice.**

## **Key Points Summary**

- In order to assess the effectiveness of the SBM pilot project within the Bromyard Cluster two key criteria have been identified, namely improving usage and effectiveness of Headteacher (HT) time, and effective financial stewardship within the project.
- There needs to be an assessment as to whether the perceived advantages demonstrated by the pilot provide value for money when the various options for long-term funding have been explored.?

## **Alternative Options**

- 1 The only alternative to a dedicated SBM working across the Bromyard Cluster is a return to the *status quo* before the pilot project began, *viz* each school working independently with the human resources at its disposal, viewing the pilot as an exercise which has exemplified good practice and improved the staff skill base.

## **Reasons for Recommendations**

- 2 This project is currently under review. This submission is part of the ongoing review process. For that reason, no firm recommendations can currently be made.

## Introduction and Background

- 3 In 2008 two Herefordshire local authority school clusters, Wigmore and Bromyard, were successful in bidding for NCSL / Local Authority funding to establish pilot School Business Manager projects. The Bromyard appointment was effective from September 2009.
- 4 As part of the wider strategic analysis within the Bromyard Cluster it was considered sensible to merge the responsibilities of Extended Schools Coordinator with that of SBM. This had the added benefit of affording sufficient total funding to extend the project over an initial two years.
- 5 In the Bromyard model, it was resolved to base the SBM at the secondary school in order to proffer the new appointee adequate wider support within the QEHC administration team. Technically, the SBM is an employee of QEHC, though funded from external sources, but working for the interest of the primary schools.
- 6 The Cluster HTs and Chairs (HTC) Group initially worked on the bid, and line management was shared by one of the primary Chairs. In the spring term of 2010 the HTC group devolved line management and performance management responsibilities to the HT of St Peter's Foundation Primary School.
- 7 The HT of St Peter's and the SBM have begun working on an SLA-type approach to ongoing funding for this post, as detailed below.

## Key Considerations

- 8 In the Bromyard context the key considerations are firstly, the desirability or otherwise of continuing the project, and secondly, how might such continuation be funded if considered desirable?
- 9 The answer to the first question is currently clear to all parties. The SBM has had a major impact on administrative efficiency and capacity within the Cluster, particularly considering most schools have only one secretary, some of which are part time, to support the school's administration.
- 10 Impacts include:
  - The cross Cluster work of the SBM has been central in helping to create an ethos out of which the formation of the EfB Trust has been made possible.
  - Negotiation and monitoring of joint grounds maintenance contracts. Savings - £1,500 pa Cluster-wide.
  - Current negotiations of joint cleaning contracts. Likely savings - £4,000 pa (estimated).
  - Photocopier contract savings - £2,800 pa.
  - Expert financial advice provided by the SBM has removed the need for schools to subscribe to the enhanced LA Finance Department SLA. Saving - £2,000 this year across the Cluster with a potential of £3,000 per year thereafter. Not all the schools within the Cluster feel the need for the same level of support. One school, for example, currently considers that its Enhanced SLA with the LA finance department is adequate support for it to ensure financial probity.
  - Completion of / readiness for FMSIS in five primary schools. Time saving to HTs has been significant. The sixth primary school had already completed the process before

the appointment of the SBM. For the HT of St Peter's, for example, time saving has amounted to approximately 100 hours. This saved time has been focused on teaching and learning. Additionally, the HT states that it would have been necessary to appoint an external consultant to provide the expertise that was made available by the SBM. Approximate total time savings to Cluster HTs – 450 hours.

- Presentation to parents to explain pupil access grant applications; this would otherwise would have been a senior management task. Expert support for parents throughout the process. Time savings to school administrators and senior leadership – 50 hours minimum.
- Completion of administration and support for parents and providers throughout the Cluster in submission of *Make it Happen* funding paperwork. Time savings to school administrators and senior leadership – 60 hours to date and a potential of 150–200 hours in total up to August 2011.
- The SBM has produced a consistent approach / policy to Performance Management for administrators and support staff across the Cluster resulting in an increase in the skill base of staff and improving value for money through staff performance.
- The SBM carried out Performance Management of administrators at St Peters' as a trial project. It was judged highly effective by the HT with benefits in terms of consistency of expectations and value for money.
- The SBM has organised and contributed to Clerk to the Governors training, offers advice and attends Governor meetings, ensuring compliance with current legislation and increasing the skill base of clerks. Time savings – 48 hours over the Cluster.
- Budget monitoring compliance with audit requirements, knowledge of budget trends, identification and resolution of errors. Time savings - 144 hours over Cluster.
- The SBM has given a lead on Safeguarding across the Cluster including the production of a Cluster-wide Safeguarding advice leaflet for visitors and voluntary workers. As a pilot, with a view to the possible inclusion in any prospective SLA, the SBM has carried out an audit of Safeguarding at St Peters' School. Time savings – 60 hours to date.
- The SBM conducts training and support for Cluster administrators half-termly to share good practice and update them on current expectations.
- The SBM conducted a needs analysis relating to after-school care across the Cluster and then negotiated with potential facilitators resulting in the establishment of a central after-school and holiday provision for the Cluster.

11 How might the project be funded into the future? Again certain key considerations must be weighed:

- Particularly in the current climate, a rigorous appraisal of the needs and cost effectiveness of the post must be conducted. The broad brush strokes alluded to above need to be firmed into clear, costed analyses.
- A central debate is that of primary HTs' time. They will always do their best to fulfil obligations and expectations but it may be argued that the SBM has provided a higher and more specialised level of expertise to discharge these duties.
- QEHC has a strong administration team, but it is working near capacity. Any new funding structure should include identified needs faced within the overall QEHC

structure and not just the Cluster primaries.

- For these reasons, the initial proposal on long-term funding is that of an SLA model. Such a model might mean, for instance, that the SBM has a core function which all schools in the Cluster will identify, cost and buy into. There would then be a series of additional options, each with its own cost formula. For example, preparing and monitoring the *Make it Happen* funding (assuming it continues beyond this financial year) could be offered at a per pupil rate.

## **Community Impact**

- 12 This project has been considered from its inception as a joint SBM / ESCo focus. As noted above, the role of the SBM has been Cluster-wide and community focused.

## **Financial Implications**

- 13 See financial discussions above, 4.

## **Legal Implications**

- 14 None currently identified.

## **Risk Management**

- 15 Consultation / needs analysis as to the nature of the SLA is crucial to secure financial sustainability for the SBM function.

## **Consultees**

- 16 Consultees include: Heads and Chairs of the seven EfB schools.

## **Appendices**

- 17 None

## **Background Papers**

- 18 None

**CLASSIFICATION: Open**

## **Wards Affected**

County-wide.

## **Purpose**

The purpose of this report is to inform Schools Forum of the effectiveness and impact on the school business management pilot programme has had within the Wigmore Cluster.

## **Introduction and Background**

- 1 The School Business Manager (SBM) Project was a nationally supported initiative brokered by the National College for School Leadership. The remit of the National College was to investigate efficiencies and new ways of working which supported the system redesign agenda. The national view being that the way schools work in certain locations was not sustainable and the application of an education business model would “ease” both financial and bureaucratic burdens. This has proved to be the case and we are now beginning to see changes in educational organisation across all areas of the country.
- 2 There was an invitation sent out to all schools in Herefordshire to offer being part of the rural schools SBM project. Two clusters responded and their cases were heard by Local Authority Officers and National College Coordinators. Both cases had merits and offered different models for rural areas.
- 3 These are sustainable projects if organised correctly. They will provide time efficiency and cost saving beyond the length of the reported project (two years).

## **Key Considerations**

- 4 The overall aim of this project was to create systems and models of practice which would place the operation of primary schools on a more business-like foundation. This may be with a hub and spoke model based around cluster working centralised at a High School or a more “flat” model with shared expertise and experiences to distribute more effectively any responsibilities. Such a move would increase the efficiency and cost effectiveness of the schools. This overall aim led us to consider the following:
  - To identify training needs and “up-skill” administrators in all primaries
  - To investigate job descriptions which reflect position and status
  - To reinforce the roles and responsibilities of SBM
  - To identify savings and VFM through joint purchasing and contracts
  - To identify joint funding projects
  - To educate Governors on the increasing burden of school business management

- To educate Governors regarding their statutory responsibilities
- To qualify all schools against FMSIS
- To audit areas of procurement including
  - Grounds Maintenance
  - Printing and photocopying
  - First aid training – collaborative approach
  - PAT testing
  - Insurance
  - Service Level Agreements including Library Service
  - To release Head teachers more to concentrate on Quality Assurance, Teaching and Learning and Strategy

#### 5 Achievements to date:

- Providing CPD across the cluster including training in risk assessment, child protection, health and safety, ensuring all schools have at least CSBM qualified staff. One school administrator has now taken responsibility for health and safety at the school advising governors on issues. 4 school administrators have attended the SBM National Conference to learn and develop thus further improving standards
- Collaborative training for caretaking and cleaning staff throughout cluster has been provided
- Collaboration has enabled economies in certain spending areas, for example through joint procurement has led to one grounds maintenance contract for 6 schools instead of 6 individual contracts – savings of £3,000 + addressing carbon foot-printing; cluster PAT testing programme savings of 10p per item
- Audit of printing and photocopying has led to a new approach resulting in less waste, more efficient and effective service. 6 months into the new contract has ensured savings of £4,600 compared to the same 6 months last year
- 4 primary schools have invested in new software for financial record keeping giving a more efficient, accurate service
- Highlighted need to update the Herefordshire Library Service funding mechanism which is now on Schools Forum agenda for consideration
- Stronger working relationships between cluster schools, for example cross phase teaching in some subject areas e.g. music, ICT, MFL leading to access to wider opportunities for pupils offering more innovation and flexibility
- Taking a more strategic role in School Business Management, particularly in areas such as finance and health and safety, therefore allowing time saving for teaching staff, particularly Head Teachers to concentrate on teaching and learning. The funding has enabled primary schools to have additional administrative support allowing administrators to have a more focused approach to SBM.

- Expertise across the schools in specific areas, for example FMSIS (financial management standards in schools). HR, Health and Safety, Risk Assessment
- Commitment across all schools to continue to collaborate and they are prepared to do things differently, improving efforts to achieve best value for money
- Cluster First Aid training

#### 6 Effects of Collaboration:

- Team building through greater trust and established common goals of cluster schools
- Sharing expertise, best practice and cutting out duplication
- Stronger negotiating power to secure better value for money
- Training together and each other
- Regular meetings giving the opportunity to spend time developing and streamlining systems and policies therefore less isolation
- The beneficial effect on school finances has led to resources being freed to enable further development of improved learning opportunities for children
- Building on strong cluster links, a second layer of strategy through the business model releases time and saves money in both Head teacher costs and resource use
- Estimated Head teacher time savings over the two year period across seven schools is approximately 1100 hours (@ £46 /hour incl. on costs = £50,600 based on 2 -4 hours per week time saving)

## Appendices

7 None

## Background Papers

8 None



<b>MEETING:</b>	<b>HEREFORDSHIRE SCHOOLS FORUM</b>
<b>DATE:</b>	<b>3 DECEMBER 2010</b>
<b>TITLE OF REPORT:</b>	<b>WORK PROGRAMME</b>
<b>REPORT BY:</b>	<b>DEMOCRATIC SERVICES</b>

**CLASSIFICATION:** Open

### **Wards Affected**

County-wide

### **Purpose**

To consider the Forum's work programme.

### **Recommendation**

**THAT:** the Work Programme be noted, subject to any comments the Forum wishes to make.

**Herefordshire Schools Forum – Work Programme 2010/11 - Please note the proposed start times for the meetings.**

<b>31 January 2011 1.00pm - Brockington</b>
<ul style="list-style-type: none"> <li>• Comprehensive Spending Review and associated announcements – analysis (including mins 24/27 re Surestart grant and early years DSG spend")</li> <li>• Update on DfE's Pupil Premium</li> <li>• Proposal to fund requirement for 25 hours Pupil Referral Unit Provision.</li> <li>• School Funding Review Group – Update</li> <li>• Trade Union Facilities Agreement</li> <li>• Workplan 2010/11</li> <li>• Dates of Meetings</li> </ul>



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Further information on the subject of this report is available from Pete Martens or Tim Brown, Democratic Services on (01432) 260248

**2 March 2011 - 9.30am - Brockington**

- School Funding 2011/12 – Final Budgets
- SEN/AEN Funding Review (Initial discussion)
- Report of Budget Working Group ( 28<sup>th</sup> January 2011)
- Schools Capital Investment Programme
- School Funding Review - update
- Workplan 2010/11
- Dates of Meetings

**10 June 2011 9.30 am Brockington(TBC)**

- AEN/SEN Funding Review (approval of consultation paper)
- Progress report on School Funding Review
- Report of Procurement Sub-Group
- Workplan 2011/12
- Dates of Meetings

**23 September 2011 1.00 pm Brockington**

- Dedicated Schools Grant (Budget and outturn)
- School Funding Review - update
- Workplan 2011/12
- Dates of Meetings

**25 November 2011 1.00 pm Brockington (TBC)**

- Outcome of AEN/SEN Funding Review Consultation
- Progress report on school funding review
- School Funding 12/13 – Draft Budgets
- Workplan 2011/12
- Dates of Meetings

<b>January 2012 (TBC)</b>
<ul style="list-style-type: none"> <li>• School Funding Review – update</li> <li>• Workplan 2011/12</li> <li>• Dates of Meetings</li> </ul>
<b>February 2012 (TBC)</b>
<ul style="list-style-type: none"> <li>• School Funding 2012/13 – Final Budgets</li> <li>• Schools Capital Investment Programme</li> <li>• School Funding Review - update</li> <li>• Workplan 2011/12</li> <li>• Dates of Meetings</li> </ul>
<b>March 2012 (TBC)</b>
<ul style="list-style-type: none"> <li>• Progress report on school funding review</li> <li>• Workplan 2011/12</li> <li>• Dates of Meetings</li> </ul>

## **Background Papers**

- None identified.

