

## Revised Claw-back Scheme

## Item 5

At February 2009 Schools Forum was referred back to the Budget Working Group to reconsider the parity of staffing at all schools included in the revised base allowance. This followed the Group's recommendation that the limits be changed for 2010/11 – the Working Group's proposal for 2009/10 was approved.

**R3 That the School Balance Claw-back scheme be amended for the 2010/11 financial year, Proposal B, as follows;**

- a. **The General Reserve calculation for primary and special schools be reduced to £25,000 or 5% whichever is the greater (down from £30,000)**
- b. **The General Reserve calculation for high schools be reduced to £45,000 or 5% whichever is the greater (down from £50,000)**

The basis of this calculation is to allow the carry forward of £5k plus sufficient balances for Primary and Special schools to afford a teacher and support assistant for the Summer term (at a cost of £15k and £5k respectively), with High schools able to afford two (subject to availability of balances).

The concern seemed to be relating to a possible mis-match between the £25,000 base for a large primary school and the £45,000 for a small high school. However this is only a minimum amount as in both cases the 5% allowance is greater than the minimum base and is always the same in both large primaries and all high schools. This is set out in the table below.

School type	Budget (£'000)	09/10 Scheme (£'000)	Original proposal B (£'000)	Parity Proposal (£'000)
Small primary A	300	30	25	25
Medium Primary B	800	40	40	40
Large Primary C	1,285	64	64	64
Large Primary D	1,350	68	68	68
Small High	1,350	68	68	80
Large High	4,800	240	240	240

Based on 2009/10 budgets, all primary schools with under 210 pupils would be entitled to the minimum £25,000 allowance.

Primary schools between 210 and 300 on roll would be permitted a balance in excess of £25,000 but below £45,000.

Primary schools above 300 on roll would be permitted balances in excess of the £45,000 as generally their budgets are greater than £900,000. (i.e. the point at which 5% becomes greater than £45,000).

**For consideration**

The Budget Working Group is invited to recommend Proposal B for 2010/11 as it achieves the required parity between large primary and small high schools.