

Project Brief

How to Use: The Project Brief should provide enough information to indicate the purpose of the project, objectives, scope, broad timescales and resource requirements. This will then be presented to CMT, or any other authorising body (Head of Service, your Line Manager etc), and authorisation must be given prior to work commencing on the more detailed project definition; which will form the basis of the formal Project Initiation Document (PID). The production of the PID will be the responsibility of the nominated Project Manager following their receipt of the authorised Project Brief.

Project Name Schools Funding Formula Review

Project Type High

Low, Medium or High Scale (see Project Assessment Matrix)

Project Executive (Sponsor) Ian Budd

Sometimes referred to as the "Sponsor", the Project Executive takes ultimate responsibility and accountability for the successful completion of the Project

Project Board

- Executive Member
- School Governors (Primary & Secondary Reps)
- Head teachers (Primary, Secondary and Specialist School Reps)
- Colin Everett CEO
- Ian Budd Director of Lifelong Learning
- Kerry Feather, Head of Finance
- Elwyn Davies, Head of Schools Services
- Tom Davies Head of Resources and Development

Project Manager Lucy Morris, Finance Manager

Project Team

- Richard Fogg, Project Accountant
- Janice Dickens, Primary Phase Officer
- Lucy Morris, Finance Manager
- Peter Heald, Schools Accountant
- Kevin Grandfield, Secondary Phase Officer
- Gary Ferguson, Corporate Finance Manager
- Nominees from the budget forum (Primary)
- Nominees from Secondary Heads Federation

Project Context / Background

The County Council in collaboration with schools plans to undertake a fundamental review of the Flintshire Schools Funding Formula. Flintshire's formula was developed many years ago and its approach reflects the educational and resource policies of the time. Although changes have been made to the formula since it was established these have tended to be incremental changes in response to particular developments or issues. The consequence of this is that Flintshire's formula may not meet the needs of schools in the 21st Century.

The County Council has conducted some initial work on the formula and this now needs to be taken forward and completed.

A key element of the review will be to analyse which responsibilities can only be undertaken by the local authority and those which may be better be commissioned from within schools' budgets. This is line with national funding reviews which have set an expectation that authorities will work to secure 80% delegation by 2012 and 85% delegation within the next 3 years.

Renewed expectations of school responsibilities and outcomes will be set out in a

revised Scheme for Financing Schools and the partnership agreements with schools.

It is important to highlight that the delegated funding arrangements for schools, with limited exceptions, provide schools with a single total budget. Governors and head teachers have freedom and flexibility within this total to deploy those resources within their own school.

It is not within the scope of this review to consider the total amount of money available for education in Flintshire but aims to ensure the available funding is distributed in such a way that meets the Authority's strategic aims for education in the County. In particular, we will ensure that formula development proposals maintain the focus on education and learning and will aim to support schools in:

- Raising achievement and attainment for all pupils;
- Narrowing the attainment gap experienced by children and young people from disadvantaged backgrounds;
- Securing early intervention to meet the special and additional educational needs of particular pupils; and
- Working together and with other agencies for the benefit of children and young people in their community both within and outside schools

The Authority believes that the review will provide a modern and equitable basis for funding schools to meet the needs of children and young people in Flintshire in the 21st Century. In return, the key role of the local authority is to hold schools to account for the range of learning opportunities and quality of outcomes achieved by children and young people.

Three sub-groups will be established to develop formula proposals across the primary, secondary and specialist phases.

Why the project is being undertaken. Links to Corporate priorities, risks and performance

Project Objectives

To develop a new schools funding formula which meets the following principles:

- Predictable
 - Stable
 - Responsive to changed circumstances
 - Transparent
 - Fair & Equitable
 - Support further delegation
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Project Scope	<p>The review will:</p> <ul style="list-style-type: none"> Establish, describe and review the existing formula. Research potential approaches and identify and review good practice. Identify the cost drivers. Establish the financial principles. Agree the policy objectives that the formula should support. Consult with relevant stakeholders.
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Project Time Scales	<p>Indicative Timetable</p> <table border="1"> <thead> <tr> <th>Month</th> <th>Task</th> </tr> </thead> <tbody> <tr> <td>March</td> <td> <ul style="list-style-type: none"> ☐ Establish the Project Board/Project Team and hold initial meetings. ☐ Agree Project Initiation Document ☐ Establish key milestones ☐ Analyse the current position: the current local formula, comparisons with other LA local formulae, ☐ Develop and send out questionnaire to schools </td> </tr> <tr> <td>April</td> <td>☐ Data analysis, school cost trends etc</td> </tr> <tr> <td>May</td> <td> <ul style="list-style-type: none"> ☐ Analyse and report on results of questionnaire ☐ Identify key factors to take forward into the new formula and cost out the implications </td> </tr> <tr> <td>June</td> <td> <ul style="list-style-type: none"> ☐ Hold workshops with members to consider policy objectives ☐ Develop funding methodology and model outcomes </td> </tr> <tr> <td>July</td> <td>☐ Interim report to Scrutiny, Executive, Heads Federation, and Schools Budget Forum</td> </tr> <tr> <td>Sep</td> <td> <ul style="list-style-type: none"> ☐ Produce a range of options ☐ Interim report to the School Budget Forum, Scrutiny & Executive </td> </tr> <tr> <td>Oct</td> <td>☐ Carry out consultation with schools and other interested parties</td> </tr> <tr> <td>Nov</td> <td> <ul style="list-style-type: none"> ☐ Collate consultation responses ☐ Report recommendations to School Budget Forum, Scrutiny & Executive </td> </tr> </tbody> </table>	Month	Task	March	<ul style="list-style-type: none"> ☐ Establish the Project Board/Project Team and hold initial meetings. ☐ Agree Project Initiation Document ☐ Establish key milestones ☐ Analyse the current position: the current local formula, comparisons with other LA local formulae, ☐ Develop and send out questionnaire to schools 	April	☐ Data analysis, school cost trends etc	May	<ul style="list-style-type: none"> ☐ Analyse and report on results of questionnaire ☐ Identify key factors to take forward into the new formula and cost out the implications 	June	<ul style="list-style-type: none"> ☐ Hold workshops with members to consider policy objectives ☐ Develop funding methodology and model outcomes 	July	☐ Interim report to Scrutiny, Executive, Heads Federation, and Schools Budget Forum	Sep	<ul style="list-style-type: none"> ☐ Produce a range of options ☐ Interim report to the School Budget Forum, Scrutiny & Executive 	Oct	☐ Carry out consultation with schools and other interested parties	Nov	<ul style="list-style-type: none"> ☐ Collate consultation responses ☐ Report recommendations to School Budget Forum, Scrutiny & Executive
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Project phasing & any key milestones, including anticipated start and end dates

Project Interdependencies	<p>Scheme for financing schools Flintshire County Council strategic policies and objectives. North Wales Consortium Work on School Funding Schools Funding Regulations (Wales) 2010 and Scheme for Financing Schools Schools Modernisation Programme School Partnership Agreements will need to be renewed in line with recommendations.</p>
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Dependencies on, and interactions with, other projects / Directorates

Project Risks	<p>Achieving consensus agreement with schools and members. Maintaining effective relationships and communications with head teachers and Governors. Establishing transitional arrangements.</p>
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Consultation	<p>Executive/Scrutiny Members Head teachers Governors CMT Trade Unions</p>
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Identify main consultees and stakeholders

Resources Required	<p>Additional expert financial resource will be secured to conduct the funding formula analysis and develop the model.</p>
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To include people, finance and ICT requirements for the project to proceed, and any budget that has been allocated

	Name	Date
Approved By	Ian Budd	