

**FLINTSHIRE COUNTY COUNCIL**

**REPORT TO:**           **LIFELONG LEARNING OVERVIEW & SCRUTINY COMMITTEE**

**DATE:**               **THURSDAY, 30 JANUARY 2014**

**REPORT BY:**       **DIRECTOR OF LIFELONG LEARNING**

**SUBJECT:**           **SCHOOL FUNDING FORMULA REVIEW**

**1.00   PURPOSE OF REPORT**

1.01   To update Scrutiny Members on the outcome of the consultation regarding the Flintshire Schools' Funding Formula review and to outline the final steps towards implementation of the new formula by April 2014.

**2.00   BACKGROUND**

2.01   The current school funding formula which is used to delegate funding to Flintshire schools was inherited from the former Clwyd County Council with its roots dating back to the introduction of Local Management of Schools in 1988. Therefore much of the information used is based on the position of Flintshire schools at that time. Although the formula has been incrementally updated there are many factors and elements within the current formula that lack a clear educational or operational rationale.

2.02   Many changes have taken place within schools since the formula was developed. The Welsh Government has introduced new initiatives and whilst distribution methods have been bolted on to historical arrangements, there has been no fundamental review by the Authority of the overall methodology for funding schools until recently.

It has long been acknowledged by schools, officers and members that a review of the formula was long overdue.

2.03   A long and detailed process has been undertaken in Flintshire to review both the Primary and Secondary formulae. A key role has been played by project groups. These groups were established to drive the development of a new set of principles which would underpin the allocation of resources to schools. The groups comprised officer, headteacher and governor representation. In addition to this there has been ongoing consultation and discussion with stakeholders through the Schools Budget Forum and Heads Federation Groups.

### **3.00 CONSIDERATIONS**

- 3.01 Consultation documents were issued for primary and secondary schools which set out the proposed key principles and cost drivers which had been considered and developed by the project groups. Schools and other stakeholders were encouraged to complete a questionnaire which formed part of the consultation document.

We received 35 responses to the primary consultation from 27 schools. A summary of the responses is shown at Appendix 1.

We received 11 responses to the secondary consultation from 10 schools. A summary of the responses is shown at Appendix 2.

The majority of responses to both the Primary and Secondary consultations were supportive of the proposals.

- 3.02 In addition to the formal consultation a significant amount of informal consultation has taken place through attendance at consortium meetings, 1:1 meetings with Headteachers, and attendance at governor and union meetings. Both the informal and formal consultation have been an invaluable element of the final design of the funding models.

- 3.03 Some key funding policy issues were discussed through the primary consultation. Firstly, respondents were generally in favour of restricting headteacher teaching commitment to 0.5 even in the smallest school and reducing headteacher teaching commitment in bigger schools from 240 pupils to 210. Secondly, some respondents raised concern that Planning, Preparation and Assessment time would be costed at HLTA rates in the funding model. Some schools have provided cover through Higher Level Teaching Assistants and specialist coaching arrangements whilst others have provided cover through teachers since the National Workload Agreement in 2003. In each case, there is no clear view on where funding could be withdrawn to reallocate to these areas.

- 3.04 Whilst we acknowledge the responses to these consultation points at this time there are insufficient funds available to provide additional funding to schools on this basis. However, the formula review has provided an opportunity to highlight and debate these issues and we would propose that they should be taken forward as a policy debate in the future as funding becomes available for additional investment.

- 3.05 Secondary schools formula impacts issued before Christmas and a number of meetings have been held with the Secondary Heads Federation to consider the outcome. Table 1 below shows the total impact of the new formula based on 2013/14 funding values and the effect in year 1 after the 75% transitional dampening for each school.

The maximum negative impact in year 1 is 0.6%.

Table 1: Secondary Impacts Due To New Formula

School	Change £	Change %	Year 1 Impact	Year 1 % Impact
Elfed High, Buckley	1,861	0.1%	465	0.0%
Connah's Quay High	-4,268	-0.1%	-1,067	0.0%
John Summers High	542	0.0%	136	0.0%
Flint High	26,296	1.0%	6,574	0.3%
St Richard Gwyn	28,791	0.9%	7,198	0.2%
Hawarden High	-20,941	-0.6%	-5,235	-0.1%
Holywell High	-16,923	-0.8%	-4,231	-0.2%
Castell Alun	14,693	0.4%	3,673	0.1%
Mold Alun	-115,677	-2.5%	-28,919	-0.6%
Maes Garmon	14,260	0.7%	3,565	0.2%
Argoed	49,281	2.0%	12,320	0.5%
St David's High	22,087	1.1%	5,522	0.3%

Based on 13/14 values

3.06 Primary schools formula impacts are due to be issued on Monday 27 January 2014. There will be an opportunity to consult further with the primary sector at the Heads Federation on the 29 January 2014.

3.07 The Schools Budget Forum considered the outcome of the consultation process on the 23 January 2014 and it has been agreed that a further meeting will be held in February prior to the Cabinet meeting on the 18 February to give further consideration to the primary formula.

#### **4.00 RECOMMENDATIONS**

4.01 To note the outcome of the formal and informal consultation process.

#### **5.00 FINANCIAL IMPLICATIONS**

5.01 The revision to the formula is modelled within existing resources and so has no impact on the Council budget. Individually schools may see an increase or decrease in their budgets in comparison to the current formula. Transition arrangements will be implemented over a three year period to allow schools with reduced levels of funding to make the necessary adjustments.

#### **6.00 ANTI POVERTY IMPACT**

6.01 None.

**7.00 ENVIRONMENTAL IMPACT**

7.01 None.

**8.00 EQUALITIES IMPACT**

8.02 The aim of the formula is to ensure that all schools received a 'fair' share of the funding available.

**9.00 PERSONNEL IMPLICATIONS**

9.01 The redistribution of resources may result in redundancies in schools.

**10.00 CONSULTATION REQUIRED**

10.01 Schools Budget Forum 23/1/14  
Primary Heads Federation 29/1/14  
Lifelong Learning Scrutiny 30/1/14

**11.00 CONSULTATION UNDERTAKEN**

11.01 Secondary Consultation Document issued 2/10/13  
Primary Consultation Document issued 21/10/13  
Lifelong Learning Scrutiny 10/10/13  
Flintshire Governors Assoc. 18/11/13  
Members Workshop 5/12/13  
Secondary Heads Federation 18/12/13 & 15/1/14

**12.00 APPENDICES**

12.01 Appendix 1 – Primary Consultation Responses  
Appendix 2 - Secondary Consultation Responses

**LOCAL GOVERNMENT (ACCESS TO INFORMATION ACT) 1985  
BACKGROUND DOCUMENTS**

None.

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