



## Schools Forum Task and Finish Group on Sustainability

Date: 6 March 2014

Time: 9.00 am

Venue: STDC, Monkmoor, Shrewsbury

### MINUTES

#### Present:

Bill Dowell (Chair)  
 Nick Bardsley [NB]  
 Rob Carlyle [RC]  
 Chris Davies [CD]  
 Gwyneth Evans [GE]  
 Hannah Fraser [HF]  
 Jo Humphreys [JH]  
 Chris Huss [CH]  
 Peter Ingham [PI]

Pete Johnstone [PJ]  
 Kay Miller [KM]  
 Gareth Profitt [GP]  
 Mark Rogers [MR]  
 James Sparkes [JS]  
 Janine Vernon [JV]  
 Phil Wilson [PW]  
 Helen Woodbridge [HW]

	ACTION
<p>1. <b>Welcome</b>            The Chair welcomed everyone to the meeting.</p>	
<p>2. <b>Apologies</b>            Apologies had been received from Phil Adams, Hilary Burke and John Hitchings. Sandra Holloway gave her apologies retrospectively.</p>	
<p>3. <b>Minutes of the meeting of 12 February 2014</b>            The minutes were accepted as a true record. MR clarified that with regard to the top slicing to enable collaboration, he had not meant federating – just amalgamating or closing.            CH asked about Somerset but GE had not yet been able to speak to her counterpart there. The Chair had copied the information he had gleaned from Somerset to Anne Gribbin as it is more like the proposed Shropshire Learning Partnership, but more advanced.            RC reported that although 10,800 homes had been built in Shropshire on recent years, the school population had actually fallen by 6% in the same period. This will be analysed further eg rural/urban. PJ wondered if there had been a population increase but that the population is ageing.            HF suggested that there are some geographical pockets which are different and RC agreed to map these.            CH suggested the need to talk to the planners.            The Chair advised that he is keeping in touch with f40. There is still no news of the national fair funding formula but MPs are being badgered re this.</p>	RC

**4. Data release to schools**

GE presented a table demonstrating the effects of the formula between 2013-14 and 2014-15. This demonstrated that size of school is not necessarily the issue when looking at pressures on the schools' finances. MR felt that in most cases it was not a sustainability issue but poor financial management/organisation. It was agreed that schools could not be looked at in isolation – areas would need to be considered re sustainability. PI suggested the need to include schools' policies, criteria, management, numbers etc.

The Chair added that headteachers and chairs of governors would need to grapple with this.

KM advised that management will change over time – the LA core provision through a framework needs to be sustainable.

HF said that there would be a need to drill down as some schools could be 'spending up' and that these spending patterns may not recur.

CD wondered if SEN could be taken out as the figures vary so much.

GE presented some further information on 2014-15 to 2015-16.

PW suggested that this information would identify when schools hit financial problems on a medium to longer term basis.

The Chair felt that it would provide a profile over a period by individual schools which would alert governing bodies to take action. It is key that the data is correct. He asked when the data would be released to schools.

The Chair suggested that a RAG rating may cause alarm. In the message communicated there needs to be an offer of support. Timing, language and narrative will need to be carefully considered.

NB asked if the message was only going to schools as they may share this. He thought that there is a need to talk to members and the public and highlight problem areas eg NOR.

CH stressed the need to send this out early to enable effective financial management. Checking of figures is important but health warnings should be added.

CD said that there is a countywide problem as the issue was 'ducked' which has exacerbated the original problem. Schools Forum has a collective responsibility for all children in Shropshire and needs to ensure that the school system is as effective as it can be.

MR suggested looking at the four or five areas which are worst affected.

KM agreed.

PI advised that governing bodies would like information about other schools and that this is needed asap.

PJ thought that the guidance notes will be key. It will be a useful tool.

The Chair spoke of the need to quantify key issues and to keep applying pressure through the MPs.

NB thought it important to say that we don't have the answers.

JB advised that the data is important. His school has gone through three rounds of redundancies so far and needs a vision for the future. A Shropshire vision is needed as the school can't cope financially and something needs to be done.

**5. Development of local Shropshire benchmarking tool**

A comprehensive draft was shared,  
 CH found this very useful but thought it would need a narrative to explain some of the issues eg nursery.  
 PI found this to be excellent and thanked RC.  
 CH asked for other ways of comparison to be added.  
 It was agreed that this should be presented to Primary/Secondary CPGs.

PW

**6. Support for schools addressing budget pressures**

PW explained the National College finance training through Edge Hill which he will be delivering.

The Chair suggested that the support team have the area information.

Cabinet will be encouraging schools to engage with each other.

PW advised that schools cannot solve this on their own.

NB said that some governing bodies are already talking to each other.

JH advised of three federations.

KM added that these don't save money.

CC advised that the Edge Hill course misses the implications of decisions re federation and PW agreed to add this.

PW

CH thought that anonymised data for areas would be useful. If schools then agree to share named data they could. Whilst federations do not save money, they do enable sustainability and closing small schools will now not save very much money.

KM added that bigger units are more efficient.

MR talked about the Bishop's Castle issues. There is a need to get more children and this is easier to do in primary than in secondary. LA facilitation of area discussions would be useful.

KM thought that some governing bodies would not enter into discussions.

She suggested an LA indicative plan for the area as a starting point.

PI suggested medium and long term plans.

JS agreed with support from the LA and advised that a timescale for sustainable collaboration would be helpful. The LA has a statutory right to close schools and it should do it.

HF asked if CE schools could collaborate and it was agreed that they could – and do.

CH asked if we need a school, how do we ensure that it exists and does not 'wither on the vine'. It was hoped that the national funding formula may deal with this.

NB thought there was a lot that members could do to encourage collaboration.

MR said that the combination of falling rolls and reducing budgets means that a reorganisation is sensible.

PW suggested that the financial modelling tool would be in schools by the end of term accompanied by a careful narrative and would then be sent to schools annually. There would be an option to request an anonymised area analysis.

MR said that there would need to be more work undertaken on areas eg sub region, ranking in best – worst areas.

PI suggested questioning schools about whether they have talked to other schools.

## Appendix B

PJ advised that federations only emerged when there was a crisis. For his school the balance between time/gain means that this won't happen.

N B suggested that the crisis is here and now.

KM reiterated that federation is not the answer. We should be encouraging different ways of working together and different structures.

### 7. **Post 16 Sustainability**

JV confirmed that financial issues are similar in post 16.

The formula is different and is overseen by the EFA. 2014-15 actual funding is not yet known but a decrease is anticipated. Graham Moore is working with post 16 schools and colleges on funding. The formula has changed from a qualification basis to a student NOR basis. NORs are also falling. Data managers are being worked with to ensure that census numbers are correct as this is key. One issue is the variance between schools and there are issues over whether the curriculum can be sustained. There is transitional protection for a few years but this ends at the end of 2014-15. Formula protection funding is in place until 2015/16. Other factors eg six week retention, success etc complicate the funding situation.

MR queried why a further post 16 setting was created when the situation is already unsustainable.

The Chair advised that the bottom line is the RAG rating – the lowest viable number for a sixth form is suggested as 150. Collaborative working is happening through the SLN.

JV added that her team are working with 11-18 schools and colleges and this will continue through SLN re collaboration and sustainable provision.

### 8. **Communications With Schools**

G P had been in attendance at the meeting.

### 9. **Future role for Task and Finish Group**

One further meeting was added – 5 June 2014 at STDC – 09.00 – 11.00

### 10. **Any Other Business**

**There was no other business**

### 11. **Future meeting dates (at Shrewsbury Training & Development Centre)**

The next meeting will be held on **Thursday 5 June 2014 - 9.00 to 11.00 am**

**The meeting closed at 11.15 am.**