

MEETING	SCHOOLS BUDGET FORUM
DATE	18 June 2014
TITLE	Review of the School Balances Directive Scheme
PURPOSE	Outcome of Consultation with Schools
RECOMMENDATION	Accept that objection voiced by certain schools imply that the revised scheme cannot be implemented
REPORT BY	Dewi R Jones, Head of Education
CABINET MEMBER FOR EDUCATION	Cllr Gareth Thomas

1. Background

- 1.1 A consultation letter was sent (appendix 1) to obtain schools opinion on review of the current schools balances directive scheme in compliance with the Schools Budget Forum's unanimous decision made at their meeting held on 19 November 2013, namely
- **Head of Education to consider implementing the right to direct schools to spend an element of their balances in instances where balances exceed 5% or £50,000 (Primary) / £100,000 (Secondary and Special) which ever is the lowest.**

2. Summary of the Schools Response

- 2.1 26 Primary Schools supported, 7 opposed and 64 did not respond.
- 2.2 7 Secondary Schools supported, 2 opposed and 5 did not respond.
- 2.3 2 Special Schools did not respond
- 2.3 Summary of the received supporting the plan:
- Good idea (1)
 - Immoral to retain excessive amount of balances in reserve (4)
 - The money is intended for pupils who attend the school at the time (2)
 - Definite schemes required for balances (2)
- 2.4 Summary of the comments received opposing the scheme :
- 5% too low, 10% is more realistic (1)
 - One financial year is insufficient to indicate a school expenditure profile (1)
 - 8% ensures flexibility (1)

3. Conclusion

- 3.1 A voluntary amended scheme was under consideration and as noted in the consultation letter “...*If the above amended scheme is to be established, it will require approval of every school...*” as the scheme may occasionally lead to implementing beyond a threshold within relevant Education legislation.
- 3.2 As all schools have not approved the scheme (9 opposed and 71 did not respond), it cannot be implemented.