

## SCHOOLS' FUNDING FORUM

<b>SUBJECT:</b>	Collaborative working between Education, Quality and Standards and Schools Financial Services
-----------------	---

<b>AUTHOR:</b>	Sue Rogers, Director of Education, Quality and Standards Yvonne King, Schools Financial Services Manager
<b>DATE:</b>	13 December 2013

<b>SUMMARY OF REPORT:</b> To highlight the benefits to schools, Education, Quality and Standards and School Financial Services since adopting a more cohesive approach.	
<b>FOR:</b>	Information

- 1.1 Staff in Schools Financial Services (SFS) and Education Quality and Standards (EQS) have in the past worked together on individual schools as the need arose. However, following the re-structure of both teams, we now have a more structured approach to our collaborative working.
- 1.2 The SFS Manager attends the School Improvement Advisors (SIA) team meetings on a regular basis, when appropriate to the agenda. The Principal Primary Advisor has given a presentation to all of the SFS team informing of the roles of the advisors, when and how they intervene in schools and the pressures Ofsted and conversion to academy present. This was particularly valuable to SFS staff, who undertake a contract in more than 150 Kent schools.
- 1.3 In many cases when a school is required to improve their standards, there are also issues with the financial management in the school. Improving standards often requires the school to review their leadership, staffing and /or resources, all having a financial implication to the school. With the LA officers working together looking at the whole school both the standards and financial issues can be addressed in a cohesive way. If a school is ultimately required to convert to academy any deficit remains with the LA, so it is imperative that SFS are aware of the schools standards/Ofsted position so that they can support the school, reviewing current monitoring and their Three Year Budget Plan to avoid a deficit situation.
- 1.4 The result of changes to high level needs funding and a move to Place Plus has meant the special schools are under greater financial pressure than they have been in the past. This has led to increased liaisons with SEN colleagues to ensure SFS adhere to both safeguarding and financial requirements. Staff in SFS and Education Learning Skills also work together on closing schools and most recently schools with large deficit budgets.

- 1.5 With additional funding available for school collaborations, EQS monitor the projects and spend for the bids. SFS support this process by collating the year-end position for collaboration monies held in schools for EQS reconciliation purposes.
- 1.6 Another benefit of our joint working is when a SIA is in a school and becomes aware that there might be inappropriate financial activity, they know to contact SFS and a compliance or financial check visit is arranged for that school. The findings are shared which might highlight financial issues that SFS would not otherwise be aware of.
- 1.7 To support a pro-active approach to our collaborative working, SFS attend the categorisation meetings, organised by EQS, where all schools causing any concern whether standards or financial information is shared. These meetings, which often take three days, are held three times a year.
- 1.8 With both teams having an understanding of each other's roles and pressures there is a more collaborative approach. Schools see that the LA are working together and are not getting conflicting information, where they are required to improve standards, which will come at a cost while SFS are asking them to look at management action to avoid the school getting into financial difficulties.

## **2. Recommendations**

- 2.1 Members of the Schools' Funding Forum are asked to note the collaborative working arrangements between Schools Financial Services and Education Quality and Standards.