

Minutes

SCHOOLS FORUM

MINUTES OF THE MEETING OF THE SCHOOLS FORUM HELD ON MONDAY 25 MARCH 2019 IN KNIGHTS HALL, GREEN PARK, ASTON CLINTON, COMMENCING AT 1.35 PM AND CONCLUDING AT 2.50 PM

PRESENT

Headteachers

Mr A Rosen	Aylesbury High School
Ms J Antrobus	Newtown School
Ms P Coppins	Manor Farm Community Infant School
Ms J Divers	Turnfurlong School
Ms S Cromie	Wycombe High School
Ms J Freeman	King's Wood School & Nursery
Mr D Hood	Cressex Community School
Mr O Lloyd	Iver Heath Junior School
Mr K Patrick	Chiltern Hills Academy
Mrs D Rutley	Wycombe Grange PRU
Mr S Sneesby	Kite Ridge School
Ms E Stewart	Stoke Mandeville Combined School
Mr A Wanford	Green Ridge Academy
Ms J Watson	Lent Rise School
Mr R Page	Chalfont Community College
Dr K Simmons	Cressex Community School
Ms C Glasgow	NASUWT
Ms S Stephens	National Education Union
Ms W Terry	Manor Farm Pre-School

Governors

Representative

In Attendance

Officers

Mr M Appleyard, Miss S Callaghan, Mr J Carter, Ms J Nicholls,
Ms A Kenward, Ms J Try and Ms E Williams

1 APOLOGIES FOR ABSENCE / CHANGES IN MEMBERSHIP

Apologies were received from Ms G Bull, Mr A Gillespie and Mrs S Fahey.

2 DECLARATIONS OF INTEREST

There were no declarations of interest.

3 MINUTES OF THE MEETING HELD ON 15 JANUARY 2019

The forum reviewed the following actions from the meeting held on 15 January 2019:

- Page 6 of the agenda pack
 - Ms J Try, Senior Accountant, confirmed details of the reintegration grant for excluded pupils had been circulated via the Schools Bulletin. Ms Try stated calculations would be back dated to 1 April 2018.
 - The list of SEN schools, including revised details for Kite Ridge School, had been shared.
 - The SEN Strategy and SEN Improvement Strategy had been updated and a new improvement board had been established.
- Page 7 of the agenda pack
 - The Schools Forum Funding Group had met as planned on 8 March 2019. A further update would be given under item 4 of this meeting
- Page 9 of the agenda pack
 - The induction session had met as planned before the meeting. A copy of the presentation would be appended to the minutes.

RESOLVED: Members of the forum AGREED the minutes for 15 January 2019 meeting and were signed by the Chairman.

4 SCHOOLS FORUM FUNDING GROUP UPDATE

Mr K Patrick, Chairman of the Schools Forum Funding Group (SFFG), gave an overview of the meeting held on 8 March 2019.

Mr Patrick confirmed the purposed of the SFFG was to review papers for content and clarity ready for discussion and decision at the meeting. The group normally had a closed membership made up of Schools Forum members however all members had been invited to attend the meeting held on 8 March to facilitate a discussion around the forum's role in agreed budget transfers to the High Needs Block (HNB).

Mr Patrick stated that the members of the Forum did not feel secure making decisions relating to the HNB and SEN with their current level of oversight. As a result of the meeting it was agreed with officers that:

- From June 2019 there would be a different approach to how financial information was displayed.
- Cost saving recommendations would include high level key performance indicators (KPI) against the seven priorities to show how money is spent and the impact on student outcomes.
- Following the start of, Hero Slinn, new Head of SEN On 1 April 2019 the existing oversight forums/meetings (i.e. inclusion hub, integrated services) would be

reviewed to see if they were still fit for purpose.

Miss S Callaghan, Service Director for Education, added there would be an interim Head of Improvement (Paulette Thompson) to support the new Head of SEN in her first couple of months in role. Ms Callaghan confirmed that she and Ms E Williams, Head of Finance, Childrens Services, had already began work regarding KPIs.

Miss S Callaghan also emphasised the need for shared accountability to drive down the spend that was contributing to unsustainable budget pressures within the HNB. The spend is for placements; if placements are high cost independent placements, the budget will remain under pressure. Therefore, there was a need for schools to work with officers to reconfigure the offer across Special Schools and additional resource provision so that there was reduced dependency on high cost placements.

A member of the forum asked if BCC would be taking legal advice regarding reductions to SEN funding given that there had been successful challenges by parents in other parts of the country. Ms Callaghan stated she was confident changes were compliant with SEN legislation.

RESOLVED: The Forum asked that initial ideas on KPIs and financial reporting be brought to the 18 June 2019 Schools Forum meeting.

5 FUNDING MECHANISM FOR SPECIAL SCHOOLS 2019-20

Ms E Williams, Head of Finance, Children Services, referred to the report circulated with the agenda.

Ms Williams confirmed the report would be taken to SF for consultation only.

The following points were discussed and Ms Williams confirmed:

- Benchmarking would take place to ensure bandings were similar to those used by other authorities.
- The initial consultation on the banding exercise would take place before the summer holidays and would focus on definitions rather than resources.
- It was intended to consider banding across all phases from mainstream to specialist provision however part of the project plan would be to consider the resources required for implementation and whether it should be phased.
- Officers were confident that the banding system was the correct solution to move away from the current provision-led system in line with national guidance. However they would be open to considering other options should they present themselves.
- It was felt the point two of the report was not well worded. It was felt it currently read as asking the Forum to make a strategic decision rather than note the report and agree its timeline. Ms Williams would review the wording.

ACTION: Ms Williams

RESOLVED: The Forum noted the report and endorsed the direction of travel.

6 SCHEME FOR SCHOOL FINANCING

Mr J Carter, BCC Accountant, referred to the report circulated with the agenda.

Mr Carter confirmed this report was to update the Forum on progress only and no decision was needed at this time. Mr Carter noted that changes had been made to the report following feedback from the SFFG.

RESOLVED: the forum NOTED the report which would now go on for consultation. Further details of the consultation would be shared in the Schools Bulletin.

7 EARLY YEARS FUNDING 2019-20 UPDATE

Mrs J Nicholls, Head of Early Years (EY) referred to the report circulated with the agenda.

At the January meeting School Forum agreed that the proposed Early Years Funding paper for 19/20 should be shared with the EY forum as there had not been time to previously consult and minor amendments would be accepted. This had now been done and small changes had been made at their request.

EY forum voted for Option 1 as set out in the report to address unspent Disability Access Funding (DAF), Inclusion Fund and contingency Fund in 2018-19 This distributes DAF using SEN and Deprivation criteria, the remaining funds to be distributed to each setting based on a 2p per child per hour basis for 2018-19 only

For 2019-20 proposals, Mr M Appleyard, Cabinet Member for Education and Skills, acknowledged that this had been a close vote and following discussion he had made the decision to adopt option 1, which will increase the deprivation budget allowing greater financial support to settings based on deprivation identified through family home post codes.

For future years there would be a different 3 & 4 year old funding model for maintained nursery schools. Currently they received a lump sum plus an additional 30p per hour per funded child. To comply with revised regulations the hourly rate will be the single universal base rate with an increased lump to maintain the same funding levels.

RESOLVED: The Forum noted the report.

8 ANY OTHER BUSINESS

Financial exposure of local schools of the liquidation of the E-ACT and Bucks Learning Trust (BLT)

Ms S Callaghan, Service Director for Education, confirmed her service was working with

the administrator for the BLT to mitigate risks.. Ms Callaghan stated it was not a statutory requirement to honour BLT's financial commitments but BCC was looking to honour statutory support to schools.

Burnham Park Academy closure

Ms Callaghan confirmed BCC was a consultee only at this stage and Mr B Dunn had been attending meetings on BCC's behalf.

Contingency fund update

Following decision letters going out to schools there had been four appeals. The Contingency Fund Group would come together following the meeting to consider the appeals.

F40 (The Campaign for Fairer Funding in Education

Mr M Appleyard, Cabinet Member for Education and Skills, was now part of this group. Mr Appleyard asked for feedback on what the Department for Education (DfE) could be doing differently for schools? [A brief email was circulated following the meeting asking for feedback.]

9 DATE OF NEXT AND FUTURE MEETINGS

Tuesday 18 June 2019, 1.30pm
Knights Hall, Green Park,

CHAIRMAN

Schools Forum Induction Dedicated Schools Grant -DSG 2019-20

25th March 2019

Janaki Try

Senior Accountant - Education,
Children's Services



DSG and the National Funding Formula (NFF) 2019-20

- Local authorities (LA) receive the Dedicated Schools Grant (DSG) for all maintained schools and academies in their areas via the Education and Skills Funding Agency (ESFA).
- The LA then consults with schools forum and they jointly set a formula for funding pre 16 maintained schools and academies.
- Buckinghamshire's Schools Forum agreed a formula in December 2018 based on illustrative allocation, then updated with final allocations as reported to Schools Forum in January 2019.



4 Blocks in DSG and NFF

- The ESFA have used the NFF rates to calculate the 4 blocks within DSG.
- 2018-19 was the first year of NFF for schools, high needs and central school services. Early Years NFF was introduced in 2017-18.
- It was expected that the ESFA would determine the formula for schools from April 2020 and fund schools directly (referred to as a “hard” funding formula), but this has been delayed and LAs will continue to determine their local formula in 2020/21. The guidance contains no detail on the requirements beyond 2020/21.



Final allocations for 2019-20

Final allocations for 2019-20 are based October 2018 census data as well as including £1.32m additional High Needs Block funding announced in December 2018.

The DfE recognises that Bucks is a more expensive area and have uplifted our allocation by using an Area Cost Adjustment for the Schools Block and the High Needs block.

Year	Schools Block £m	High Needs £m	Central School Services Block £m	Early Years £m	Total DSG £m
2019-20	322.171	82.692	7.425	30.687	442.975



Transfer from Schools Block

- The schools block is ring-fenced in 2019 to 2020, but local authorities may transfer up to 0.5% into another block, with the approval of their schools forum.
- Local authorities wishing to make a transfer should consult with all local maintained schools and academies, and the schools forum should take into account the views of the schools responding before giving their approval.



Why transfer funds between blocks

- The DfE recognises that most proposals to move funding from their schools block will arise as a result of pressures on their high needs budgets.
- All local authorities are expected to keep their local offer of special provision under review.
- The DfE state it is particularly important that mainstream schools are clear about how they contribute to the local offer, and how the extent of that contribution can affect the need for more specialist provision and the costs that local authorities consequently have to meet from their high needs budgets.



Transfer from schools block – disapplication

- If the local authority wishes to move more than 0.5% of the schools block OR the schools forum has turned down a proposal from the authority to move funding out of the schools block, but the authority wishes to proceed with the transfer – then the local authority can submit a disapplication request to the Secretary of State.



(NFF) and Schools Block (pre 16)

- The ESFA lists 15 factors – only 2 are compulsory:
- (1) Basic Entitlement –Average Weighted Pupil Unit (AWPU) assigns funding on the basis of individual pupils, based on the October census with different rates for Primary, KS3 and KS4
- (2) Deprivation - Local authorities can use free school meals (FSM), and/or the income deprivation affecting children index (IDACI) – based pupil post codes, to calculate the deprivation factor



Bucks Schools Formula 2019-20

- The LA is responsible for making the final decisions on the formula
- Bucks Schools Forum agreed that the local formula would mirror NFF as far as possible to provide better clarity to schools when planning their budgets and to avoid a cliff edge when the hard NFF was introduced
- For 2019-20 Schools Forum agreed to maintain the NFF factors that were agreed in 2018-19, with prorating (scaling) of each factor to match the available allocation of funding from the DfE.



Schools Block 2019-20

Schools Block	Pupil Led Factors £m	Premises and Mobility factors £m	Growth Funding £m	Total Funding 2019-20 £m
	316.251	3.632	2.288	322.171

The bulk of the DfE allocation to the LA is through pupil led factors (98% in 2019-20). The LA must also allocate at least 80% of the schools block through pupil led factors - AWPU, deprivation, prior attainment, LAC, EAL, Mobility and Minimum Funding Level (per pupil funding for primary/secondary).

The DfE has allowed Bucks to apply an exceptional premises factor to support small schools with 50 pupils or less.



October 2018 Census Data

- The October 2018 census data shows an increase of 779 pupils on last year, with a shift from Primary to Secondary.
- Pupil characteristics - an increase in the number of pupils in the prior attainment categories, and an increase in pupils receiving Free School Meals.
- These population characteristics will have an effect on the distribution of funding over the funding formula factors.



Moving from a historical formula to the NFF

- There will be ‘winners and losers’ as we move to a NFF
- To maintain fairness we are allowed to minimise losses to an individual school to minus 1.5% of previous eligible funding – known as the ‘Minimum Funding Guarantee’ (MFG).
- When this amount for the LA has been calculated, a cap is set on ‘winning’ schools to provide for a corresponding amount to fund MFG.

- The 2019-20 formula has:
 - -Local Funding Factors at 99.17% of NFF values
 - - MFG totalling £416k for 26 schools, met from capping 46 schools to the equivalent amount.



Buckinghamshire County Council

Funding Factor Rates

Funding Factor	2018/19 Final Rates	2019/20	Full NFF with ACA
Scaling factor (% of NFF)	97.68%	99.17%	100.00%
Primary AWPUP	£ 2,758.71	£ 2,800.83	£ 2,824.24
KS3 AWPUP	£ 3,879.47	£ 3,938.35	£ 3,971.27
KS4 AWPUP	£ 4,404.70	£ 4,471.77	£ 4,509.14
Primary MFL	£ 3,223.43	£ 3,470.99	£ 3,500.00
Secondary MFL	£ 4,493.27	£ 4,760.22	£ 4,800.00
Primary FSM	£ 441.88	£ 448.62	£ 452.37
Secondary FSM	£ 441.88	£ 448.62	£ 452.37
Primary FSM6	£ 542.30	£ 550.58	£ 555.18
Secondary FSM6	£ 788.35	£ 800.39	£ 807.07
Primary IDACI band F	£ 200.85	£ 203.92	£ 205.62
Secondary IDACI band F	£ 291.24	£ 295.68	£ 298.15
Primary IDACI band E	£ 241.02	£ 244.70	£ 246.75
Secondary IDACI band E	£ 391.66	£ 397.64	£ 400.97
Primary IDACI band D	£ 361.54	£ 367.06	£ 370.12
Secondary IDACI band D	£ 517.20	£ 525.09	£ 529.48
Primary IDACI band C	£ 391.66	£ 397.64	£ 400.97
Secondary IDACI band C	£ 562.39	£ 570.98	£ 575.75
Primary IDACI band B	£ 421.79	£ 428.23	£ 431.81
Secondary IDACI band B	£ 602.56	£ 611.76	£ 616.87
Primary IDACI band A	£ 577.45	£ 586.27	£ 591.17
Secondary IDACI band A	£ 813.45	£ 825.88	£ 832.78
Primary Low Attainment*	£ 1,054.48	£ 1,042.03	£ 1,050.74
Secondary Low Attainment	£ 1,556.61	£ 1,580.38	£ 1,593.59
Primary EAL	£ 517.20	£ 525.09	£ 529.48
Secondary EAL	£ 1,390.91	£ 1,412.14	£ 1,423.95
LAC	£ -	£ -	£ -
Mobility	£ 502.13	£ 508.50	£ 512.75
Lump Sum	£ 110,469.11	£ 112,155.88	£ 113,093.20
Sparsity Primary (up to)	£ 25,106.62	£ 25,489.97	£ 25,703.00
Sparsity secondary (up to)	£ 65,277.20	£ 66,273.93	£ 66,827.80
MFG	-1.50%	-1.50%	-1.50%
Capping	4.96%	3.13%	n/a
Fringe uplift where applicable	1.56%	1.56%	1.56%



Buckinghamshire's Growth Fund

- The locally determined required level of growth fund in 2019/20 is £2.4m and is met fully from Schools Block. It is used for:
- **Start-up funding** - covers costs for new schools before they open
- **Diseconomies funding** - reflect the diseconomies of scale in the first few (3 to 5) years of a new school until pupil funding gives them sufficient economies of scale.
- **Growth Fund** - for all existing schools - based on significant anticipated demand measured and agreed by the LA.



Mainstream Schools – AWPU and Notional SEN

- AWPU - This is used to make general provision for all pupils in the school, including pupils with SEND, and goes directly to schools.
- Notional SEN - The DfE states - Schools and academies should have sufficient funding in their schools block budget to enable them to support pupils' SEND where required, up to the mandatory cost threshold of £6,000 per pupil per annum. This is an indicative amount that schools may set aside for pupils with SEND.



Inadequate Notional SEN

- Local authorities can provide additional funding, for a minority of schools which have particular difficulties because of their disproportionate number of pupils with SEND or high needs or their characteristics. This is calculated and allocated to eligible schools early in the financial year.



High needs Block Funding

- **Top –up funding.** This is for high-need low-incidence SEND, where individual pupils require additional support that costs more than £6,000 (notional SEN). Top-up funding rates are set by the LA, by agreement with schools and academies.



The High Needs Block

- The DfE states: The high needs funding system supports provision for children and young people with special educational needs and disabilities (SEND) from their early years to age 25 - statutory duties under the Children and Families Act 2014.
- High needs funding is also intended to support good quality Alternate Provision for pre-16 pupils who, because of exclusion, illness or other reasons, cannot receive their education in mainstream or special schools.



DfE expectations on High Needs

- In consultation with their schools forum, LAs make decisions on the spending of funds held centrally, most of which is used for making high needs provision.
- These spending decisions are most effective when there is a strong partnership between the LA and the institutions providing education. The schools forum is one way in which partnership working can be strengthened, particularly with schools.
- The LA has a statutory duty to keep the services and provision for children and young people with SEND under review, as required by the Children and Families Act 2014.

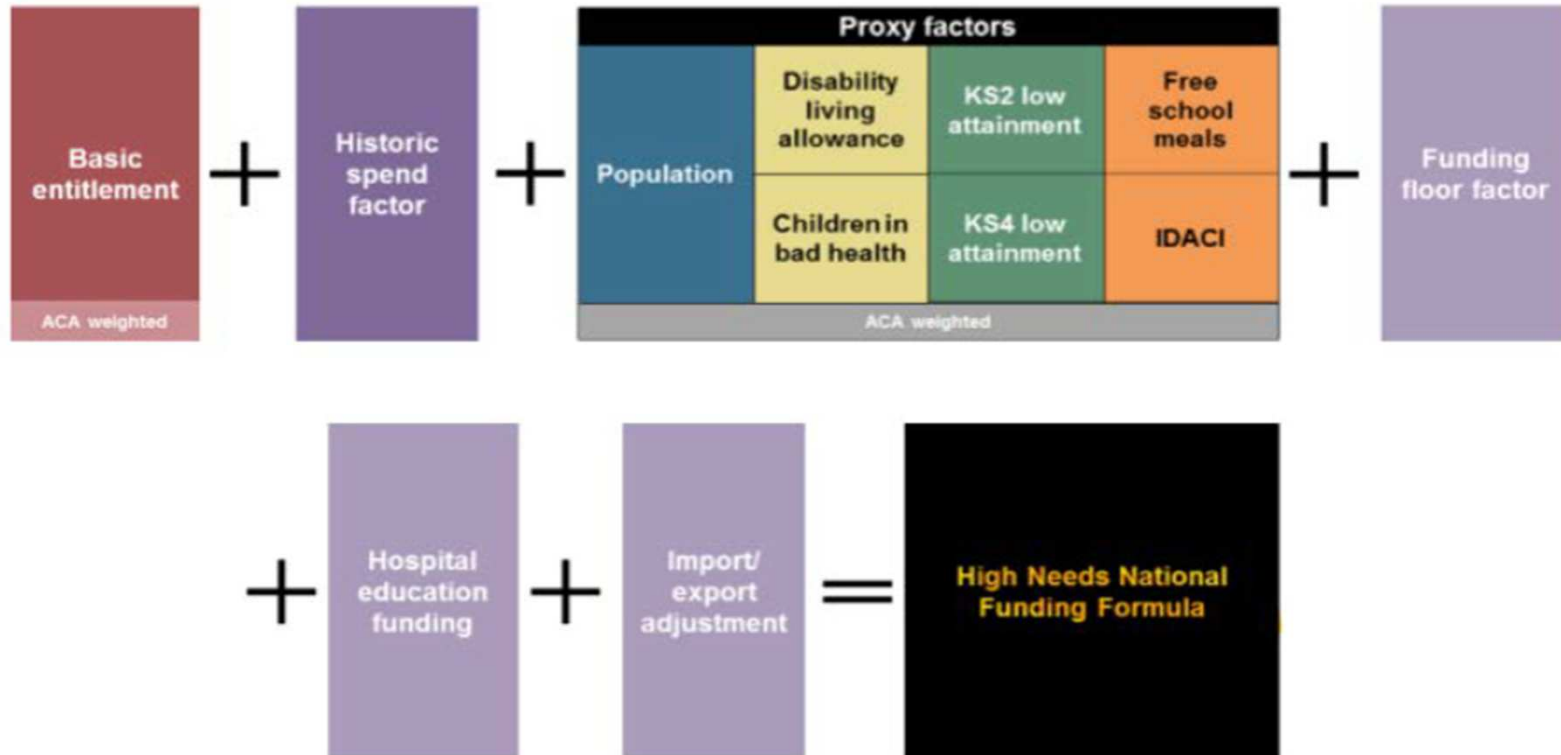


High Needs Block – Definitions and Methodology

- Basic entitlement factor – based on pupil and student numbers in special schools and special post-16 institutions. The funding rate is £4,000 per pupil or student and is subject to an area cost adjustment.
- Funding Floor -This ensures local authorities do not fall below a minimum level of funding.
- Import/export adjustment - funding formula that reflects the movement of high needs pupils and students between LAs, (that is if they live in one authority and attend a school or college in another).



HN Block methodology



Other services met from High Needs Block

- While the majority of a local authority's high needs budget is spent on place and top-up funding for institutions, local authorities can also use high needs funding to provide additional or targeted support for children and young people with SEND. For example:
- Therapies (SALT and OT),
- Specialist Teaching Service (expertise in supporting pupils with complex needs who are available to advise, train and support other teachers and SEN co-ordinators in mainstream schools and colleges).
- Specialist support for pupils at risk of exclusion



Central Schools Services Block (CSSB)

- **CSSB comprises two parts:**
- (1) Funding for ongoing functions, – based on a per pupil amount. The indicative amount for 2019-20 is £2.771m.
- Includes: £1.178m Education Services Grant (ESG) retained duties where the local authority has a responsibility for all schools, £0.835m for Admissions Team, Transfer Process and Parental Information.



Central Schools Services Block (CSSB)

- (2) Funding for historic commitments. Based on evidence submitted to the DfE. The 2019-20 allocation is £4.654m. From 2020 to 2021, The DfE will start to reduce the historic commitments element of the CSSB where local authorities' expenditure has not reduced.
- Includes: £2.311m Contribution to combined budgets (LA and DSG funded contracts such as Early Years support), and £1.708m Capital contribution from revenue.



Early Years Block

- **There 6 funding streams:**
- (1) Early years universal entitlement for three and four year olds (15 hours)
- (2) Early years additional entitlement for three and four year old children of eligible working parents (additional 15 hours)
- (3) Early years entitlement for disadvantaged two year olds (15 hours)
- (4) Supplementary funding for Maintained Nursery Schools (MNS)
- (5) Early Years Pupil Premium (EYPP)
- (6) Disability Access Fund (DAF), £615 per pupil per year



Early Years Block

- The pass-through requirement: LAs are required to pass at least 95% of their three and four year old funding from the DfE to early years providers. This includes hourly rates, deprivation funding, Inclusion funding for individual children with low level or emerging SEND, and contingency funding.
- The LA can hold 5% for central spend including the cost of staff and 'Sufficiency and sustainability' funding for providers

