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SCHOOLS FORUM

Wednesday, 13th January, 2016
at 3.30 pm

PLEASE NOTE TIME OF MEETING

Conference Room 3 - Civic Centre

This meeting is open to the public

LEAD OFFICER

Dave Cuerden, Finance Manager

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FORUM ADMINISTRATOR

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AGENDA

Agendas and papers are now available via the City Council's website

1 APOLOGIES AND CHANGES IN MEMBERSHIP (IF ANY)

2 MINUTES OF PREVIOUS MEETING (Pages 1 - 4)

Minutes of the meeting held on 23rd September 2009, attached.

3 DECLARATIONS OF INTEREST

In accordance with the Localism Act 2011, and the Council's Code of Conduct, Members to disclose any personal or pecuniary interests in any matter included on the agenda for this meeting.

NOTE: Members are reminded that, where applicable, they must complete the appropriate form recording details of any such interests and hand it to the Democratic Support Officer.

4 ELECTION OF CHAIR AND VICE-CHAIR

To elect the Chair and Vice Chair for the School Year 2015/16.

5 SECONDARY SCHOOLS EXPANSION (VERBAL UPDATE)

Verbal update by the School Organisation and Strategy Manager.

6 EARLY YEARS BLOCK (Pages 5 - 8)

Decision paper of the Finance Manager detailing the allocations within the Early Years Block, attached.

7 HIGH NEEDS BLOCK; (Pages 9 - 12)

Briefing paper of the Finance Manager outlining proposals for the High Needs Block including funding for Special Schools, Special Units in Maintained Schools and Pupil Referral Units (PRUs) from April 2016, attached.

8 2016/2017 SCHOOLS BLOCK (Pages 13 - 24)

Decision paper of the Finance Manager detailing the 2016/17 Schools Block which funds Primary and Secondary School budget shares and Central Services retained by the Local Authority, attached.

HEAD OF LEGAL AND DEMOCRATIC SERVICES

Agenda Item 2

**SCHOOLS FORUM
NOTES OF THE MEETING HELD ON
WEDNESDAY 23 SEPTEMBER 2015
CANTELL MATHS & COMPUTING COLLEGE**

Present:

<u>Primary School Representatives</u>	
John Draper	Swaythling Primary School
Peter Howard	Fairisle Junior School
Amanda Talbot-Jones	St Denys Primary School
<u>Secondary School Representatives</u>	
Jonty Archibald	Regents Park
Toni Sambrook	Woodlands Community College
<u>Special Schools Representatives</u>	
Andy Evans	Great Oaks School
<u>Academy Representatives</u>	
Anne Murphy	St Anne's Convent
Sean Preston	Hamwic Trust
David Turner	Townhill Infant School
<u>Pupil Referral Unit Representative</u>	
Alison Parsons	PRU/Compass
<u>Non Schools Representative</u>	
Eamonn Keogh	Council Representative
David Wright	PVI provider of early year entitlement
Chris Ode	NASUWT
<u>Observers</u>	
Sue Thompson	Early Years/Sure Start
Councillor Dan Jeffery	Cabinet Member for Education and Change
Robert Hardy	Principal Officer for Early Years and Education
Dave Cuerden	People Directorate's Finance Manager
Irfan Khan	Principal Accountant

1. **APOLOGIES AND CHANGES IN MEMBERSHIP (IF ANY)**

The Forum noted the apologies of Richard Harris and Peter Sopowski.

It was noted that the following Members had been appointed:

- Martin Brown had replaced Ruth Evans as a secondary school representative.

In addition the following vacancies were noted:

- 2 X Primary School Representatives
- 1 X Academy Representative
- 1 X Non Schools Representative for post 16 Education
- 1 X Secondary Representative Substitute

The Forum thanked Cantell School for hosting the meeting.

2. **ELECTION OF CHAIR AND VICE CHAIR**

For the purposes of this meeting the Forum appointed Robert Hardy as Chair.

Volunteers were sought from the forum to appoint to the Position of Chair and Vice Chair and it was agreed that the details of the roles of Chair and Vice Chair be circulated to the Forum in advance of the next meeting. It was agreed that the formal appointment of Chair and Vice-Chair would be deferred.

3. **NOTES OF PREVIOUS MEETING AND MATTERS ARISING**

The Minutes of the Meetings held on 24th June 2015 were approved as a correct record.

4. **SCHOOLS FORUM TERMS OF REFERENCE 2015-2016 AND DECLARATION OF INTEREST**

The Forum considered the briefing paper of the Clerk to the Forum detailing updates and minor changes to the constitution and setting out the requirement for Forum Members to declared their own financial interests and acknowledge the code of conduct.

It was noted that in order to align with current custom and practice the Forum agreed to adjust the numbers of Primary and Secondary Sector substitutes as set out in the report.

RESOLVED that the Terms of Reference set out in the report be agreed and adopted for the academic year.

5. **SECONDARY SCHOOL EXPANSION AND IMPROVEMENT 2015/2025**

The Forum considered and noted the discussion paper written by the School Organisation and Strategy Manager, detailing considerations relating to secondary school expansion within the City

The Forum discussed a number of matters including:

- the need to prepare for additional secondary school places in future years. Members requested, if possible, to see how accurate previous forecasts had actually been;
- the reliability of forecasts of school places; and
- the potential requirement to set up a secondary growth fund.

6. **UPDATE ON EDUCATION AND CHILDREN'S SOCIAL CARE CAPITAL PROGRAMME 2015/16 AND 2016/17**

The Forum considered and noted the report of the Interim Principal Officer for Education and Early Years setting out proposals for the Council's spending priorities within the Capital Programme for 2015/16 and future years, in line with Council priorities.

The Forum noted that Cabinet and Council had approved £6.6M of expenditure to the Education and Children's Social Care (E&CSC) Capital Programme earlier in September and that an additional £1.3M for increased capacity at Springwell Special School following increased demand on special places had also been approved.

7. **UPDATES TO SCHOOL FUNDING FORMULA 2016/2017**

The Forum considered the report of the Interim Principal Officer for Education and Early Years providing an update on school funding formula for 2016/17 on the basis of information provided by Department for Education

The Forum noted that In July 2015 Central Government announced that it was committed to further moves towards a fairer funding system, the details of which will not be known until after the autumn spending review. The earliest any changes could be introduced is for the 2017-18 financial year.

The Forum noted that any forthcoming Spending Review was not expected until October 2015, at the earliest, and that the review will set out further detail on key schools priorities and would confirm funding levels for other grants and programs.

It was noted that Final funding allocations to each Authority will be made in December, in line with the latest data on their pupil numbers and the Forum noted the basis for allocation of funding and that changes implemented in 2015/16 to the funding formula will continue into 2016/17.

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DECISION PAPER

SUBJECT: Early Years Block

DATE: 13th January 2016

RECIPIENT: Schools Forum

SUMMARY:

The Dedicated Schools Grant (DSG) is split into three notional blocks: Schools Block, Early Years Block and High Needs Block. This paper looks at the allocations within the Early Years Block.

A new funding formula for Schools, High Needs (HN) and Early Years (EY) will be introduced to address the current disparity in per pupil funding rates across England. There will be a national basic per pupil rate, with additional amounts for pupils with higher needs. Following consultation in 2016, the new formula will be introduced from 2017/18, with a transitional period to help schools manage the change.

RECOMMENDATION:

It is recommended that the Schools Forum :

- (i) Note the proposed Early Years block of £13.82 million.
- (ii) Approve the central expenditure elements of the Early Years Block summarised in Appendix 1.

REASONS FOR REPORT RECOMMENDATIONS

1. To ensure there is adequate funding for the statutory responsibility of the provision of nursery places across the City and to continue to support those services currently funded under the central expenditure element of the DSG.

ALTERNATIVE OPTIONS CONSIDERED AND REJECTED

2. The provision of nursery education places is a statutory responsibility.

BACKGROUND and BRIEFING DETAILS:

3. Early years funding differs from school funding because of the requirement for providers to be funded for the child's hours that they actually provide each term, rather than on an annual pupil count.
4. The Early Years Single Funding Formula (EYSFF) funds nursery providers on of the number of hours provided in the current year. There are six payments a year (two per term) based on estimates and actuals, for private voluntary and independent settings and academies and annually for some maintained school settings. The formula for 3 and 4 year olds has a base hourly rate plus additional elements relating to quality, deprivation and flexibility. These additions are calculated each January to be paid in the next financial year.

5. Dedicated Schools Grant - Early Years Block

The provisional Early Years Block part of the Dedicated Schools Grant is detailed in the table below, currently based on the January 2015 count plus an allowance for anticipated growth:

	Funding 2016-17
3 & 4 year old pupil numbers	2,420
Guaranteed per pupil unit of funding (GUF)	£4,892.69
Total	£11,840,300
2 year old funding	£2,230,100
Early Years Premium	£272,000
Provisional Early Years Block	£14,342,400

6. The January 2016 Early Years Census will be used to calculate the Early Years Block with adjustments made in January 2017 to reflect the actual numbers the LA will have to fund from Sep 2016 to March 2017. It should be noted however that the Summer term has the highest take up.

7. 2 year old funding

The level of funding within the Early Years Block for 2 year olds is estimated to increase from the £1,979,600 for 2015/16 reported at Schools Forum January 2015 to £2,230,100 for 2016/17, an increase of £250,500.

The increase in funding is due to an increase in take up of the 2 year old early education offer, however we are still below the national average in our 2 year old take up.

The estimated level of income for 2016/17 has been calculated using the current status of participation data, with an expected increase of 5% growth for 2016/17. Any increase above this level will create a further net income per placement of £0.12 per hour.

The funding received from the DfE will be based on the EY Census figures from January 2016 and January 2017.

8. Since September 2014, 40% of disadvantaged children nationally have been legally entitled to 570 hours per year (up to a maximum of 15 hours per week) of free early education.

9. A two-year-old will be eligible if they meet any one of the following criteria:

- a) They meet the eligibility criteria also used for free school meals;
- b) Their families receive Working Tax credits and have annual gross earnings of no more than £16,190 per year;
- c) They have a current statement of SEN or an Education, Health and Care plan;
- d) They attract Disability Living Allowance;
- e) They are looked after by the local authority;
- f) They have left care through special guardianship or an adoption or residence order

10. Funding will be allocated to the providers at a standard hourly rate of £4.95 per hour.

11. Central expenditure

Schools Forum approval is required for central expenditure within the Early Years Block. Appendix 1 shows the provisional Early Years Block budget for 2016/17.

12. The existing services funded by DSG within the Early Years Block are:

- Early years & Childcare Development team (£319,300)
- Provision for expansion of 2 year old places (£171,800)
- Contracts for pre-school and child-minding (£100,000)
- EY funding for administration, staffing and systems for allocating funding to providers (£40,600)
- Overheads (£172,600) covering central costs including Finance, HR, IT etc.

These items are for school forum decision.

13. Transfers to the High Needs Block

In 2015/16 an amount of £240,900 was transferred to fund High Needs block pressures as detailed in the High Needs paper. It is proposed that this transfer will increase to the maximum currently available within the Early Years Block for 2016/17, (£521,900). This represents an increase from 2015/16 of £281,000.

14. Estimates have been made of the numbers of 2, 3 and 4 year olds in the city to ensure that the budget is sufficient to fund demand. If Early Years numbers increase above those already anticipated, the city council will receive additional DSG at a rate of £4,892.69 per pupil. Conversely, if the numbers reduce, the level of DSG will fall accordingly, creating a potential pressure. However, this will not be confirmed until June 2017.

Appendices/Supporting Information:

Appendix 1: Early Years Block 2016/17

Further Information Available From:

Name: David Cuerden

Tel: 023 8083 3878

E-mail: David.Cuerden@southampton.gov.uk

Estimated Early Years Budget 2016-17

Early Years (EY) Block

DfE 2016/17 Provisional Early Years Block	£14,342,400
2015/16 High needs transfer from early years block (agreed 20/01/2015)	(£240,900)
Additional 2016/17 High need transfer from early years block	(£281,000)
Total Early Years Block	<u>£13,820,500</u>
2, 3 & 4 Year Old Childcare Funding	£13,016,100
Early years Development	£491,100
Contracts with National Childminding Association, Pre-school Learning Alliance and MENCAP	£100,000
EY funding for administration, staffing and systems	£40,600
Overheads	£172,600
TOTAL	£13,820,500

BRIEFING PAPER

SUBJECT: High Needs Block

DATE: 13th January 2016

RECIPIENT: Schools Forum

THIS IS NOT A DECISION PAPER

SUMMARY:

1. This paper outlines the proposals for the High Needs Block including funding for Special schools, special units in maintained schools and Pupil Referral Units (PRUs) from April 2016.

A new funding formula for Schools, High Needs (HN) and Early Years (EY) will be introduced to address the current disparity in per pupil funding rates across England. There will be a national basic per pupil rate, with additional amounts for pupils with higher needs. Following consultation in 2016, the new formula will be introduced from 2017/18, with a transitional period to help schools manage the change.

BACKGROUND and BRIEFING DETAILS:

2. The proposed High Needs Block is shown in Appendix 1.

The Children and Families Act 2014 extends local authorities' statutory duties relating to SEN across the 0 to 25 age range. A range of providers, including maintained nursery schools, maintained schools, academies (including free schools), non-maintained special schools, further education and sixth form colleges, as well as those independent special schools and specialist post-16 institutions, have a duty to cooperate with the local authority on arrangements for children and young people with SEN (with a reciprocal duty on the local authority) and a duty to admit a child or young person if the institution is named in an Education Health and Care (EHC) plan.

The high needs funding system remains largely unchanged from 2015 to 2016. This means any pressures over and above the unchanged baseline budget position will add pressure to High Needs block.

As per the DFE announcement there is an overall pressure on high needs of £3,412,000. The school forum agreed a significant transfer of funding of £2,049,200 for High Needs pressures from the Schools block (£1,808,300) and Early Years block (£240,900) in January 2015. As a result of an increase in ongoing high needs pressures, this amount has increased to £3,412,000, an increase of £1,362,800.

Due to the flexibility available within Early Years block, an additional £281,000 is proposed to be transferred to High Needs block. This means the remaining balance of this pressure of £1,081,800 will need to be funded by reducing schools block.

BRIEFING PAPER

3. High Needs pupils in maintained schools

From April 2014, the DfE imposed a mandatory threshold of £6,000 of additional support per High Needs pupil that schools are required to fund from their formula budget. This was in line with the 2013/14 threshold implemented in Southampton and will continue to be implemented for 2016/17.

For 2016/17 Schools will continue to be reimbursed for support of more than 12 hours per week, term time only at a rate of £10.98 per hour.

4. Special Schools, Special Free Schools and Special Units

The local authority has identified, based on current profile, the number of places required at the five special schools, three special units and one free school in the 2016/17 financial year as shown in Table 1 below.

School	Places April 2016	Places Sept 2016
Springwell School	128	144
Great Oaks School	170	170
The Cedar School	70	70
The Polygon School	55	55
Vermont School	32	32
Bitterne Park School	8	8
Tanners Brook Primary School	14	14
Redbridge Community School	7	7
Rosewood School	32	32
Total	516	532

5. It is planned to expand Springwell special school by 16 places in September 2016 at a cost of £93,300 for the part year. Further analysis of the growth from 2015/16 and the pressure it generates is provided below.
6. Special schools, special free schools and maintained schools with a special unit are funded on the basis of a flat £10,000 per place plus a per pupil top-up. Schools only receive top-up funding for the actual numbers of pupils in their school.
7. While there is not a Minimum Funding Guarantee for Special school and units, there is a requirement that the top-up element of the funding is set at such a level that, if all the places were filled and the pupils came from the maintaining authority, the school's budget would reduce by no more than 1.5%. Top-up banding rates will be kept at 2015/16 level.
8. Pupil Referral Unit – Compass School

The PRU will continue to be funded for 160 places. Each place will attract a base level of funding of £10,000 as per the DfE requirements. Top-up funding per pupil will be paid by the commissioner of the place (either the local authority or a school) on the basis of three place types – Band 1, 2 and 3. Correspondingly top-up rates will reduce to offset the increase in base level funding as per DfE guidelines. The overall budget will remain consistent with the 2015/16 level.

BRIEFING PAPER

9. High Needs Pressures

The school forum agreed a significant transfer of funding of £2,049,200 for High Needs pressures from the Schools block (£1,808,300) and Early Years block (£240,900) in January 2015. As a result of an increase in ongoing high needs pressures, this amount has increased to £3,412,000, an increase of £1,362,800.

Due to the flexibility available within Early Years block, an additional £281,000 is proposed to be transferred to High Needs block. This means the remaining balance of this pressure of £1,081,800 will need to be funded by reducing schools block.

		High Needs Pressures	Comments
Total High Needs Pressure		£3,412,000	
High Needs pressures funded from Schools Block in 2015/16	(£1,808,300)		
High Needs pressures funded from Early Years Block in 2015/16	(£240,900)		
Total Transfer between blocks in 2015/16		(£2,049,200)	Agreed by School Forum in January 2015
Additional High Needs pressure in 2016/17		£1,362,800	
MARP - Education Placements	£729,100		The pressure is due to forecast and known increase in activity.
SEN Post 16	£206,800		The pressure is due to forecast and known increase in activity.
Special Schools and Pupil with Statements	£448,000		The pressure is based on the latest activity information and projected growth for 2016/17.
Other minor movements in high needs programme	(£21,100)		
Total Transfer between blocks in 2016/17		£1,362,800	

10. Furthermore, 2016/17 will see a significant increase in places at special schools. The place numbers reported to Schools Forum in January 2015 were 508 for September 2015. This has increased to 532 by September 2016.

Appendices/Supporting Information:

Appendix 1 Estimated High Needs Block 2016/17

Further Information Available From:

Name: David Cuerden

Tel: 3878

E-mail: David.Cuerden@Southampton.gov.uk

BRIEFING PAPER

Appendix 1

Estimated High Needs Block 2016/17

High Needs Block	2016-17
DfE 2016/17 High Needs Block	£18,087,000
Transfer from Early Years block, (as detailed within EY report)	£521,900
Transfer from Schools block*	£2,890,100
Total High Needs Block	<u>£21,499,000</u>

*£1,808,300 transferred in 2015/16. £1,081,800 new for 2016/17.

Funding for Academies, Free Schools and Colleges	£2,600,400
Funding for independent providers	£2,989,600
Funding for maintained providers	£13,475,900
Other Alternative Provision	£77,900
SEN support services	£808,500
Support for inclusion	£1,219,700
Overheads	£327,000
TOTAL	<u>£21,499,000</u>

DECISION PAPER

SUBJECT: 2016/17 Schools Block
DATE: 13th January 2016
RECIPIENT: Schools Forum

SUMMARY:

This paper details the 2016/17 Schools Block which funds Primary and Secondary school budget shares and central services retained by the local authority.

A new funding formula for Schools, High Needs (HN) and Early Years (EY) will be introduced to address the current disparity in per pupil funding rates across England. There will be a national basic per pupil rate, with additional amounts for pupils with higher needs. Following consultation in 2016, the new formula will be introduced from 2017/18, with a transitional period to help schools manage the change.

RECOMMENDATION:

It is recommended that the Schools Forum :

- (i) Approve the central expenditure elements of the Schools Block summarised in Appendix 1.
- (ii) Approve the de-delegation of a centrally held Trade Union Duties budget of at a rate of £71,600 in 2016/17.
- (iii) Note the transfer of £1,081,800 of funding between the Schools and High Needs Blocks for 2016/17.

The school forum agreed a transfer of funding of £1,808,300 for High Needs pressures from the Schools block in January 2015. As a result of an increase in ongoing high needs pressures, the overall pressure has increased by £1,362,800.

Due to the flexibility available within Early Years block, an additional £281,000 is proposed to be transferred to High Needs block. This means the remaining balance of this pressure of £1,081,800 will need to be funded by reducing the schools block.

REASONS FOR REPORT RECOMMENDATIONS

1. Local Authorities are required to allocate the Dedicated Schools Grant and prepare budgets for the three blocks for which funding is given by the DfE.

ALTERNATIVE OPTIONS CONSIDERED AND REJECTED

2. The provision of school education places is a statutory responsibility.

BACKGROUND and BRIEFING DETAILS:

3. Schools Block

The level of the Schools Block is based on the October 2015 pupil count. The DfE has confirmed the size of the Schools Block as shown in Table 1 below.

Table 1	2015/16 Actual	2016/17 Actual	Increase/ (decrease)
Schools Block Unit Funding (SBUF)	£4,641.02	4,645.84	0.10%
Pupil count - October	28,030	29,121	3.89%
Additional Funding for induction of NQTs	£42,000	£42,000	
Reduction for Carbon Reduction Commitment	Included within SBUF	Included within SBUF	
Transfer for Inspire Free School	£299,000	0	
Schools Block	£130,429,000	£135,333,500	3.77%

4. The Schools Block Unit Funding is set at a level defined by the DfE and shows a 0.10% increase. Primary and Secondary pupil numbers in the city have risen by 3.89%. The overall increase in the Schools Block is 3.77%.

5. Table 2 provides details of the breakdown of the % increase in pupils.

Table 2: Breakdown of pupil increase			Change	
Sector	2015/16	2016/17	Numbers	%
Primary	18,427	19,290	863	4.68
Secondary	9,603	9,831	228	2.37
Total	28,030	29,121	1,091	3.89

6. Income Deprivation Affecting Children Index (IDACI) Funding 2016/17

In 2015 the National IDACI scores that are attached to individual postcodes were updated (previously it was IDACI 2010). The Deprivation factor within schools funding as per the national APT tool (provided by the EFA) is based on IDACI bandings and analysis has shown that, as a whole, Southampton's deprivation levels have reduced. This is due to the percentage of deprived children living in the same lower super output areas reducing using 2015 IDACI.

7. De-delegation

The following de-delegated budgets **will need to be approved by the Schools Forum** to be held centrally:

- Support for schools in financial difficulties (£100,000). 2015/16 spend on this budget is shown in appendix 2.
- Trade Union Duties (£71,600)

This is a Schools Forum decision.

8. Central Services

The following central services budgets, at the same level as 2015/16, are proposed to be held centrally and **are to be agreed by the school forum**:

- Admissions function (£422,100)
- MASH and Early Help (£626,800)

The following central services budget, in line with DfE regulations, will be held centrally:

- Copyright Licensing Agency (CLA) and Motion Picture Licensing Company (MP) Licences (£128,200).

9. Primary Growth Fund, (£613,200)

This budget **will need to be approved by the Schools Forum** to be held centrally.

In March 2015, the school forum agreed option 2 for allocation and distribution of growth fund in 2016/17 to support those Primary schools expanding as part of the Primary Review. Alternatively this budget could be delegated to all schools, however expanding schools would be responsible for funding any extra costs within their own budget shares.

For 2016/17 the rate per extra class is outlined in agreement with school forum to reflect recalculated costs for the same assumed increase in staff provision.

Option 2 (Agreed by School Forum in 11th March 2015 meeting)

- additional funding will be based on the increased number of classes required (based on 30 pupils per class) as detailed below:-
 - £26,600 per extra class (based on the costs of a Teacher, an LSA and a Lunchtime Supervisor for 7/12's of the year)
 - £ 1,000 recruitment costs
 - £ 2,400 sundries
 - **Total £30,000**
- The additional funding for sundries of £2,400 only applied to Schools that did not receive capital funding for a new build.

10. The breakdown of total growth fund of £613,200 for 2016/17 summarised in Table 3 below.

Table 3 – Growth Fund Allocation				
Number of Schools	Number of Add'l classes required	2016/17 Rate	Funding for additional classes	Comments
		£	£	
	14	30,000	420,000	Full allocation including funding for sundries only applied to Schools that did not receive capital funding for a new build.
	7	27,600	193,200	No allocation for sundries because these schools will receive capital funding.
	3			Two schools are expected to grow by more than one class room. It is proposed to allocate funds for additional classes through Authority Proforma Tool (APT).
21	24		613,200	

Total additional classes of twenty four are expected to be required for twenty one schools. Of these, fourteen classrooms are proposed to be allocated funding of full £30,000 per classroom. Seven classrooms will attract slightly reduced funding excluding sundries because these schools will receive capital funding.

Two schools are expected to grow by more than one additional classroom. It is proposed to allocate funding for three additional classrooms through Authority Proforma Tool (APT).

11. School budget shares

The school forum agreed a transfer of funding of £1,808,300 for High Needs pressures from the Schools block in January 2015. As a result of an increase in ongoing high needs pressures, the overall pressure has increased by £1,362,800.

Due to the flexibility available within Early Years block, an additional £281,000 is proposed to be transferred to High Needs block. This means the remaining balance of this pressure of £1,081,800 will need to be funded by reducing schools block.

After transferring funding between blocks and updating all of the pupil data for each school for the October 2015 pupil count the table below details school budget shares.

Table 4	
Individual Schools Budget, (post de-delegation)	£133,371,600
2015/16 High needs transfer from schools block (agreed 20/01/2015)	(£1,808,300)
2016/17 Budget shares at 2015/16 funding levels	£131,563,300
Additional 2016/17 High need transfer required from schools block	(£1,081,800)
New Individual Schools Budget	£130,481,500
Budget shares post transfer between blocks	£130,481,500

12. The Schools Forum will need to explore options and recommend the approach to reduce the Schools Block by £1,081,800 in order to facilitate the transfer of funding to the High Needs Block.

Below are three options to achieve the required reduction to meet the transfer of £1,081,800 to High Needs. Please consider that due to the DfE now using IDACI 2015 there are considerable number of schools that are now at the MFG.

All options are based on changes to the baseline 2014/15 Average Weighted Pupil Unit (AWPU) and adjustments to the cap on any schools that net gain.

Option 1

Increase AWPU by 3.2%, Cap any gainers to keep 0.19% but scaling back by 98.61%.

Option 2

Increase AWPU by 0%, Cap any gainers to keep 2.32% with 99.40% scaling.

Option 3

Increase AWPU by 0.77%, Cap any gainers to keep 1.30% but scaling back by 96.71%.

The financial impact of these options on individual schools budgets is detailed in appendix 4.

13. Appendix 1 shows the breakdown of the Schools Block 2016/17.

Appendices/Supporting Information:

Appendix 1: Breakdown of the Schools Block 2016/17.

Appendix 2: Commitments against Intervention Fund 2015/16.

Appendix 3: Breakdown of Growth Fund Allocation 2016/17

Appendix 4: Impact of options for School budget shares

Further Information Available From:

Name:	David Cuerden
Tel:	023 8083 3878
E-mail:	David.cuerden@southampton.gov.uk

Estimated Schools Block 2016/17

Schools Block

DfE 2016/17 Schools Block	£135,333,500
2015/16 High needs transfer from schools block (agreed 20/01/2015)	<u>(£1,808,300)</u>
	£133,525,200
Additional 2016/17 High need transfer required from schools block	<u>(£1,081,800)</u>
Total Schools Block	<u>£132,443,400</u>
<u>Central Services</u>	
Primary Review Growth Fund	£613,200
Admissions function	£422,100
MASH and Early Help	£626,800
CLA and MPA Licences	<u>£128,200</u>
Individual Schools Budget before de-delegation	£130,653,100
<u>De-delegated</u>	
Support for schools in financial difficulties	£100,000
Trade Union Duties	£71,600
Final Individual Schools Budget	<u>£130,481,500</u>
Final Individual Schools Budget 2015/16	<u>£126,418,400</u>
Increase in Individual Schools Budget	<u>£4,063,100</u>

Appendix 2 - Analysis of Intervention Fund - 2015/16

	£	£
Allocations to Schools		100,000
<i>Add</i>		
Roll Forward from 2014/15	206,000	
<hr/>		
Total Budget		306,000
<hr/>		
<i>Less Known Commitments</i>		
Contribution towards IEB support costs for Schools	70,000	
3 payments to Chair of School IEB (Unspecified) (@ £2.5K per Term)	(7,500)	
Employment of 2 NQT's at St George's due to Expansion	35,000	
Schools in financial difficulties	180,000	
School Payment for Claim relating to Redundancies	4,000	
Total Commitments		<hr/> 281,500
<hr/>		
Balance Unallocated		24,500
<hr/>		

DECISION PAPER

Appendix 3 – Primary Growth Fund Allocation 2016/17

URN	DfE No.	School Name	Expected NOR Sept 2016	Number of Classes 2015/16	Number of Classes Required 2016/17	Variance	Adjusted for APT	Comments
116251	2754	Fairisle Infant and Nursery School	345	11	12	1	27,600	One additional classroom is funded through APT
116262	2770	Shirley Warren LC Primary & Nursery School	380	12	13	1	27,600	
116107	2429	Sholing Junior School	299	9	10	1	27,600	
116103	2424	St John's Primary and Nursery School	294	9	10	1	27,600	
116398	3658	St Patrick's Catholic Primary School	420	13	14	1	27,600	
132117	2002	Thornhill Primary School	354	12	13	1	27,600	
132025	2001	Valentine Primary School	730	24	25	1	27,600	
116116	2440	Banister Primary School and Nursery	420	12	14	2	30,000	
131839	2000	Bassett Green Primary School	545	17	18	1	30,000	
140263	2404	Beechwood Junior School	328	10	11	1	30,000	
116088	2405	Bevois Town Primary School	334	11	12	1	30,000	
	2428	St Monica Primary School	653	21	22	1	30,000	
116261	2769	Foundry Lane Primary School	564	18	19	1	30,000	
139747	3659	Harefield Primary School	420	13	14	1	30,000	
116395	3655	Highfield C of E Primary School	304	12	13	1	30,000	
139619	2460	Kanes Hill Primary School	410	13	14	1	30,000	
131272	2401	Mansel Park Primary School	388	13	14	1	30,000	
116127	2455	Moorlands Primary School	341	12	13	1	30,000	
116342	3203	St Mark's C of E VC Primary School	536	18	19	1	30,000	
116343	3205	St Mary's C of E VC Primary School	579	19	20	1	30,000	
116126	2452	Wordsworth Primary School	550	16	19	3	30,000	Two additional classrooms are funded through APT
TOTALS			9,194	295	319	24	613,200	

Appendix 4: Impact of options for School budget shares

School Name	2015/16 Actual Post De-Delegation Budget Share	Pupil Growth/Reduction between Oct 14 and Oct 15 Census' %	Option 1			Option 2			Option 3			Notes
			School Budget Share (Post De-Delegation)	Increase/Decrease vs 2015-16	Inc/Dec vs 2015-16 as %	School Budget Share (Post De-Delegation)	Increase/Decrease vs 2015-16	Inc/Dec vs 2015-16 as %	School Budget Share (Post De-Delegation)	Increase/Decrease vs 2015-16	Inc/Dec vs 2015-16 as %	
Bassett Green Primary School	£2,035,312	8.39%	£2,191,460	£156,148	7.67%	£2,162,023	£126,711	6.23%	£2,162,023	£126,711	6.23%	Growing School
Valentine Primary School	£2,239,230	9.94%	£2,454,673	£215,443	9.62%	£2,501,842	£215,443	9.62%	£2,480,771	£241,541	10.79%	Growing School
Thornhill Primary School	£1,391,917	11.41%	£1,532,542	£140,625	10.10%	£1,513,903	£140,625	10.10%	£1,513,903	£121,985	8.76%	Growing School
Newlands Primary School	£1,792,870	4.44%	£1,882,130	£89,260	4.98%	£1,882,130	£89,260	4.98%	£1,882,130	£89,260	4.98%	Growing School
Sinclair Primary School	£889,384	4.15%	£908,357	£18,974	2.13%	£908,357	£18,974	2.13%	£908,357	£18,974	2.13%	Growing School
Mansel Park Primary School	£1,463,838	6.29%	£1,547,439	£83,601	5.71%	£1,523,355	£83,601	5.71%	£1,523,969	£60,131	4.11%	Growing School
Bevois Town Primary School	£1,202,174	15.27%	£1,366,732	£164,558	13.69%	£1,364,747	£164,558	13.69%	£1,371,415	£169,240	14.08%	Growing School
BITTERNE MANOR PRIMARY	£824,064	12.80%	£912,828	£88,764	10.77%	£927,505	£88,764	10.77%	£921,276	£97,212	11.80%	
Bitterne Park Primary School	£2,048,956	4.33%	£2,134,918	£85,962	4.20%	£2,175,842	£85,962	4.20%	£2,156,840	£107,884	5.27%	
Mount Pleasant Junior School	£1,332,519	10.81%	£1,441,389	£108,870	8.17%	£1,441,389	£108,870	8.17%	£1,441,389	£108,870	8.17%	Growing School
MAYTREE NURSERY AND INFANTS	£1,283,943	-0.76%	£1,255,805	-\$28,138	-2.19%	£1,255,805	-\$28,138	-2.19%	£1,255,805	-\$28,138	-2.19%	Growing School
St.Denys Primary School	£874,461	1.48%	£873,914	-\$546	-0.06%	£873,914	-\$546	-0.06%	£873,914	-\$546	-0.06%	Growing School
St. John's Primary and Nursery School	£1,030,872	18.06%	£1,200,381	£169,508	16.44%	£1,182,050	£169,508	16.44%	£1,182,713	£151,841	14.73%	Growing School
St. Monica Primary School	£2,059,723	1.31%	£2,086,347	£26,624	1.29%	£2,125,780	£26,624	1.29%	£2,108,099	£48,376	2.35%	
Sholing Junior School	£910,702	11.72%	£1,002,851	£92,149	10.12%	£1,005,895	£92,149	10.12%	£1,011,511	£100,809	11.07%	Growing School
Sholing Infant School	£1,011,960	1.52%	£1,027,394	£15,434	1.53%	£1,014,036	£15,434	1.53%	£1,019,673	£7,713	0.76%	Growing School
Swaythling Primary	£880,943	1.97%	£896,961	£16,018	1.82%	£894,488	£16,018	1.82%	£898,842	£17,899	2.03%	
Woolston Infant School	£725,935	0.56%	£732,825	£6,890	0.95%	£745,260	£6,890	0.95%	£739,603	£13,668	1.88%	
Weston Park Primary School	£2,313,060	4.97%	£2,394,645	£81,585	3.53%	£2,383,909	£81,585	3.53%	£2,383,909	£70,849	3.06%	
Tanners Brook Primary School	£2,183,761	-4.19%	£2,130,623	-\$53,138	-2.43%	£2,167,510	-\$53,138	-2.43%	£2,152,523	-\$31,239	-1.43%	
Banister Primary School and Nursery	£1,238,660	25.17%	£1,498,715	£260,055	20.99%	£1,498,715	£260,055	20.99%	£1,498,715	£260,055	20.99%	Growing School plus est NOR
Mansbridge Primary	£929,003	9.27%	£990,100	£61,097	6.58%	£990,100	£61,097	6.58%	£990,100	£61,097	6.58%	
Redbridge Primary	£918,212	1.97%	£935,362	£17,150	1.87%	£932,532	£17,150	1.87%	£936,885	£18,673	2.03%	
Moorlands Primary School	£1,084,447	12.27%	£1,203,407	£118,960	10.97%	£1,215,874	£118,960	10.97%	£1,214,894	£130,447	12.03%	Growing School

School Name	2015/16 Actual Post De-Delegation Budget Share	Pupil Growth/Reduction between Oct 14 and Oct 15 Census' %	Option 1			Option 2			Option 3			Notes
			School Budget Share (Post De-Delegation)	Increase/Decrease vs 2015-16	Inc/Dec vs 2015-16 as %	School Budget Share (Post De-Delegation)	Increase/Decrease vs 2015-16	Inc/Dec vs 2015-16 as %	School Budget Share (Post De-Delegation)	Increase/Decrease vs 2015-16	Inc/Dec vs 2015-16 as %	
Weston Shore Infant	£507,137	1.15%	£505,550	-£1,587	-0.31%	£505,550	-£1,587	-0.31%	£505,550	-£1,587	-0.31%	
Townhill Junior School	£1,193,121	8.70%	£1,287,374	£94,253	7.90%	£1,295,712	£94,253	7.90%	£1,299,617	£106,496	8.93%	Growing School
Oakwood Primary School	£1,428,034	-1.47%	£1,404,803	-£23,231	-1.63%	£1,398,872	-£23,231	-1.63%	£1,407,348	-£20,685	-1.45%	
Fairisle Infant/Nursery School	£1,142,256	4.95%	£1,191,888	£49,632	4.35%	£1,177,675	£49,632	4.35%	£1,177,675	£35,420	3.10%	Growing School
Fairisle Junior	£1,278,449	0.60%	£1,285,962	£7,513	0.59%	£1,282,296	£7,513	0.59%	£1,289,343	£10,894	0.85%	
Foundry Lane Primary School	£1,753,308	6.21%	£1,859,137	£105,829	6.04%	£1,894,755	£105,829	6.04%	£1,878,406	£125,098	7.13%	Growing School
Shirley Warren Primary & Nursery School	£1,482,166	11.01%	£1,607,072	£124,906	8.43%	£1,607,072	£124,906	8.43%	£1,607,072	£124,906	8.43%	Growing School
Mason Moor Primary	£1,197,371	4.38%	£1,227,519	£30,147	2.52%	£1,227,519	£30,147	2.52%	£1,227,519	£30,147	2.52%	
Bitterne CE Primary School	£1,467,316	0.24%	£1,390,743	-£76,573	-5.22%	£1,416,083	-£76,573	-5.22%	£1,405,096	-£62,220	-4.24%	
St. Mark's CE Primary School	£1,971,127	-1.46%	£1,948,746	-£22,381	-1.14%	£1,950,467	-£22,381	-1.14%	£1,960,436	-£10,690	-0.54%	
St. Mary's Primary School	£2,433,537	3.07%	£2,467,791	£34,254	1.41%	£2,467,791	£34,254	1.41%	£2,467,791	£34,254	1.41%	
Highfield C.E. Primary School	£998,186	5.99%	£1,053,264	£55,078	5.52%	£1,071,639	£55,078	5.52%	£1,063,476	£65,290	6.54%	Growing School
Holy Family Primary School	£1,636,496	2.01%	£1,670,258	£33,761	2.06%	£1,652,563	£33,761	2.06%	£1,661,145	£24,649	1.51%	
St. Patricks Catholic Primary	£1,353,991	2.95%	£1,393,508	£39,517	2.92%	£1,419,725	£39,517	2.92%	£1,407,551	£53,560	3.96%	Growing School
REGENTS PARK COMMUNITY COLLEGE	£3,401,557	9.84%	£3,730,413	£328,855	9.67%	£3,671,148	£328,855	9.67%	£3,693,837	£292,280	8.59%	
The Sholing Technology College	£5,067,043	-0.97%	£5,032,286	-£34,757	-0.69%	£5,050,819	-£34,757	-0.69%	£5,083,453	£16,410	0.32%	
Redbridge Community School	£5,926,304	-1.09%	£5,913,753	-£12,551	-0.21%	£5,826,363	-£12,551	-0.21%	£5,826,363	-£99,941	-1.69%	
Chamberlayne College for the Arts	£2,729,666	-0.21%	£2,729,841	£175	0.01%	£2,697,465	£175	0.01%	£2,712,828	-£16,838	-0.62%	
Bitterne Park School	£7,389,460	-0.60%	£7,401,889	£12,429	0.17%	£7,344,710	£12,429	0.17%	£7,392,638	£3,178	0.04%	
Woodlands Community College	£3,538,646	0.18%	£3,497,098	-£41,547	-1.17%	£3,497,098	-£41,547	-1.17%	£3,497,098	-£41,547	-1.17%	
Cantell School	£5,271,850	6.18%	£5,500,323	£228,473	4.33%	£5,500,323	£228,473	4.33%	£5,500,323	£228,473	4.33%	
St. George Catholic Voluntary Aided College	£3,109,388	12.88%	£3,443,076	£333,687	10.73%	£3,443,076	£333,687	10.73%	£3,443,076	£333,687	10.73%	
Hollybrook Junior School	£811,325	1.46%	£810,816	-£509	-0.06%	£810,816	-£509	-0.06%	£810,816	-£509	-0.06%	
Hightown Primary School	£1,082,913	-5.69%	£1,027,173	-£55,740	-5.15%	£1,014,021	-£55,740	-5.15%	£1,014,021	-£68,892	-6.36%	

School Name	2015/16 Actual Post De-Delegation Budget Share	Pupil Growth/Reduction between Oct 14 and Oct 15 Census' %	Option 1			Option 2			Option 3			Notes
			School Budget Share (Post De-Delegation)	Increase/Decrease vs 2015-16	Inc/Dec vs 2015-16 as %	School Budget Share (Post De-Delegation)	Increase/Decrease vs 2015-16	Inc/Dec vs 2015-16 as %	School Budget Share (Post De-Delegation)	Increase/Decrease vs 2015-16	Inc/Dec vs 2015-16 as %	
Beechwood Junior School	£1,190,623	9.20%	£1,271,788	£81,165	6.82%	£1,271,788	£81,165	6.82%	£1,271,788	£81,165	6.82%	Growing School
Ludlow Junior School	£1,984,650	0.53%	£1,999,853	£15,203	0.77%	£2,038,209	£15,203	0.77%	£2,021,024	£36,374	1.83%	
Ludlow Infant Academy	£1,022,400	-0.37%	£1,021,640	-£760	-0.07%	£1,040,103	-£760	-0.07%	£1,031,846	£9,446	0.92%	
Portswood Primary	£1,463,947	6.21%	£1,550,775	£86,829	5.93%	£1,567,578	£86,829	5.93%	£1,566,169	£102,222	6.98%	
Shirley Junior School	£1,462,776	-4.78%	£1,401,825	-£60,951	-4.17%	£1,428,136	-£60,951	-4.17%	£1,415,839	-£46,937	-3.21%	
Shirley Infant School	£947,525	0.00%	£950,234	£2,709	0.29%	£966,963	£2,709	0.29%	£960,130	£12,605	1.33%	
Glenfield Infant School	£967,616	0.80%	£976,441	£8,826	0.91%	£983,626	£8,826	0.91%	£985,647	£18,031	1.86%	
Wordsworth Primary School	£1,384,939	36.34%	£1,848,988	£464,049	33.51%	£1,883,921	£464,049	33.51%	£1,869,124	£484,185	34.96%	Growing School plus est NOR
Hollybrook Infant School	£682,082	0.00%	£683,210	£1,128	0.17%	£693,535	£1,128	0.17%	£689,375	£7,293	1.07%	
Kanes Hill Primary School	£1,527,476	4.96%	£1,601,178	£73,702	4.83%	£1,631,085	£73,702	4.83%	£1,617,407	£89,931	5.89%	Growing School
Townhill Infant School	£1,033,954	0.78%	£1,043,216	£9,262	0.90%	£1,027,499	£9,262	0.90%	£1,030,561	-£3,394	-0.33%	
Freemantle C of E Community Academy	£1,541,301	0.76%	£1,555,427	£14,126	0.92%	£1,555,883	£14,126	0.92%	£1,564,233	£22,933	1.49%	Growing School
Springhill Catholic Primary	£2,206,415	5.76%	£2,331,124	£124,709	5.65%	£2,298,292	£124,709	5.65%	£2,312,195	£105,780	4.79%	
Harefield Primary School	£1,497,478	5.65%	£1,553,405	£55,927	3.73%	£1,553,405	£55,927	3.73%	£1,553,405	£55,927	3.73%	
Upper Shirley High School	£3,897,712	1.59%	£3,900,292	£2,580	0.07%	£3,900,292	£2,580	0.07%	£3,900,292	£2,580	0.07%	
St. Anne's Catholic School	£4,783,697	0.42%	£4,812,391	£28,695	0.60%	£4,733,096	£28,695	0.60%	£4,733,096	-£50,601	-1.06%	
Oasis Academy Lordshill	£3,421,743	9.66%	£3,683,726	£261,983	7.66%	£3,683,726	£261,983	7.66%	£3,683,726	£261,983	7.66%	
Oasis Academy Mayfield	£4,121,899	6.38%	£4,312,241	£190,343	4.62%	£4,312,241	£190,343	4.62%	£4,312,241	£190,343	4.62%	

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