

Schools Forum

Wednesday, 27th April, 2016
at 3.30 pm

PLEASE NOTE TIME OF MEETING

Regents Park Community College,
King Edwards Avenue, SO16 4GW

This meeting is open to the public

LEAD OFFICER

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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 AND MATTERS ARISING (Pages 1 - 4)

Minutes of the meeting held on 9 March 2016, 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 UPDATE ON SECONDARY SCHOOL EXPANSION

Verbal update by the Principal Officer, Education and Early Years.

5 RESPONSE TO STAGE 1 CONSULTATION (SCHOOLS NATIONAL FUNDING FORMULA) (Pages 5 - 8)

Report of the Principal Accountant regarding response to Stage 1 Consultation (Schools National Funding Formula), attached.

6 PROVISIONAL PROGRAMME OF WORK/ DATES FOR 2016/17 (Pages 9 - 10)

Programme of meetings, proposed business and dates, attached.

22 April 2016

Service Director, Legal and Governance

Agenda Item 2

**SCHOOLS FORUM
NOTES OF THE MEETING HELD ON
WEDNESDAY 9th MARCH 2015
SURE START SHOLING**

Present:

<u>Primary School Representatives</u>	
Richard Harris (Chair)	Moorlands Primary Governor
John Draper	Swaythling Primary School
Peter Howard	Fairisle Junior School
<u>Secondary School Representatives</u>	
Jonty Archibald	Regents Park
Martin Brown	The Sholing Technology College
Toni Sambrook	Woodlands Community College
<u>Special Schools Representatives</u>	
Anne Hendon-John	Polygon School
<u>Academy Representatives</u>	
David Turner (Vice Chair)	Townhill Infant School (Governor)
Sean Preston	Hamwic Trust
<u>Pupil Referral Unit Representative</u>	
Alison Parsons	Compass School
<u>Nursery Schools Representative</u>	
Anne Downie	Startpoint Northam and Sholing
<u>Also in attendance:</u>	
Ed Grimshaw	Clerk
Jo Cassey	Principal Officer for Early Years and Education
Irfan Khan	SCC Principal Accountant
Dave Cuerden	SCC People Directorate's Finance Manager
Sevil Rush	SCC Finance Manager

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

The Forum noted the apologies of Councillors Keogh and Jeffrey, Chris Ode, Mark Sheehan, Andy Evans and Anna Wright.

The Chair expressed the thanks and best wishes to Dave Cuerden the Forum's financial advisor for his help and support to the Forum as he was leaving the City Council to take up another position elsewhere.

In addition it was noted that the following vacancies still required to be filled:

- 1 X Primary Schools Sector Representative
- 1 X Primary Schools Sector Representative (Substitute)
- 1 X Secondary Schools Sector Representative
- 1 X Secondary Schools Sector Representative (Substitute)
- 1 X Special School Sector
- 1 X Academy Schools Sector
- 1 X Non-Schools Sector (Post 16 representative)

The Chair thanked the Sholing Sure Start Centre for hosting the meeting.

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

The Minutes of the Meetings held on 13th and 20th January 2016 were approved as a correct record.

3. **SECONDARY SCHOOLS EXPANSION (VERBAL UPDATE)**

The Forum noted that the matter continued to develop and

4. **SUPPORT FOR SCHOOLS IN FINANCIAL DIFFICULTIES (FORMERLY INTERVENTION FUND)**

The Forum considered the report of the Principal Officer Education and Early Years detailing the Support for Schools in Financial Difficulties Funding.

The Forum AGREED that the criteria set out in the report should be used to assess what payments could be made to a school. In addition the Forum AGREED that the Option 2 set out in the report would be adopted to govern the process of how and when the payments would be made. A new bidding application / business case template will be developed and shared with all schools who contributed to this fund. For Clarity the report stated that:

“The schools apply through a bidding process once their half yearly budget plans are updated in September / October. Should a school believe that their financial circumstances warrant further consideration and financial support under exceptional circumstances, then a business case will need to be submitted to

the Principal Officer for Early Years and Education for such consideration. Any submission will need the support of the school's governing body. It will need to be reviewed by the Finance Manager and Principal Accountant for Early Years & Education prior to formal consideration by Principal Officer."

5. **SPECIAL SCHOOLS AND UNIT PROVISION 2016/17**

The Forum considered a report outlining the proposals for the funding for special schools within the City.

The Forum noted that there is no requirement for a Minimum Funding Guarantee (MFG) for special school and units. However, that 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%.

It was also noted that due to the pressures on the High Needs Block for 2016/17, there have been a subsequent requirement to transfer over an additional £1.1M of funding from the Schools Block to the High Needs Block. This was confirmed that this was consistent with the change of funding in mainstream schools to accommodate the transfer of funding between blocks. The top up rates for 2016/17 will remain as 2015/16.

In addition it was noted that the actual top-up funding that the schools receive may vary compared to the indicative allocations because actual payments will be made on the basis of actual number of Southampton pupils within each band. For other local authority pupils, schools will receive funding from those authorities directly. It was AGREED that this would be on a case by case basis.

6. **NATIONAL FUNDING FORMULA FROM 2019-20 – VERBAL UPDATE**

The Forum received a briefing from Irfan Khan seeking to update members of the Forum of the consultation process for the introduction of the New National Funding Formula for schools.

It was noted that the Department for Education (DfE) had started a two stage consultation on their proposals for the New Fair Funding Formula. The DfE are planning to introduce a school-level ('hard') national funding formula from 2019-20, significantly reducing the role of local authorities, and a local authority level ('soft') formula in 2017-18 and 2018-19.

It was noted there was a two stage consultation being undertaken by the DfE.

It was explained Stage 1: "A vision for the future funding system as a whole and the principles that underpin it" in particular:

- the design of the system
- the role of the local authority
- the factors to include for each block

It was noted that Stage 1 of the consultation was open, to 17 April 2016.

It was further noted Stage 2: detailed proposals for factor weightings and

the impact of the new formulae on local authorities and schools It was explained that this will start after Stage 1 at a date to be confirmed. It was also explained that the consultation on Early Years consultation would follow on later the year.

It was AGREED at the meeting that the links relating to Stage 1 of consultation would be circulated to all schools and that members should encourage colleagues to take part in the consultation to ensure that there was as full a response as possible.

The following links were made available:

The Official Press Release:

<https://www.gov.uk/government/news/fairer-school-funding-plan-revealed>

A link to the schools national funding formula consultation:

<https://consult.education.gov.uk/funding-policy-unit/schools-national-funding-formula>

In relation to respond to the consultation the online consultation form can be found here:

<https://consult.education.gov.uk/funding-policy-unit/schools-national-funding-formula>

Related Documents

- [Schools national funding formula: Government consultation – stage one](#)
3.2 MB (PDF document)
- [Schools and high needs funding reform: The case for change and consultation summary](#) 1.8 MB (PDF document)

High needs funding reform consultation:

The online form for responding to consultation can be found here:

<https://consult.education.gov.uk/funding-policy-unit/high-needs-funding-reform>

Related Documents

- [Research on funding for young people with special educational needs](#) (815.2 kB PDF document)
- [High needs funding consultation: technical note](#) (324.1 kB PDF document)
- [Schools and high needs funding reform: The case for change and consultation summary](#) (1.8 MB PDF document)
- [Research on funding for young people with special educational needs: Research report July 2015](#) (1.9 MB PDF document)

BRIEFING PAPER

SUBJECT: SCC Response to Stage 1 Consultation (Schools National Formula)
DATE: 27 April 2016
RECIPIENT: Schools Forum

THIS IS NOT A DECISION PAPER**Background**

1. The Department for Education (DfE) launched on 7 March 2016 its latest plans on introducing a National Funding Formula for schools. The consultation published on 7 March is only the 1st of 2 stages. There is as yet no timetable for the Stage 2 consultation. This 1st stage is a consultation on principles and ‘building blocks’. The DfE indicates that the 2nd stage will present figures. It is still not possible to calculate the impact of a National Funding Formula (NFF) to confirm any change in the totality of funding for the City Council or in the distribution of funding between phases or types of schools and academies.
2. As part of the 1st stage, there are two consultations being undertaken, one on a national formula for funding schools and a second one on the funding arrangements for High Needs. Related consultations on Early Years funding arrangements and for school improvement are expected later in the year.

Summary of Proposed Changes for Schools Block

3. In 2017/18 and 2018/19, the NFF will be used to calculate schools block allocations to each LA, i.e. the schools block will be a summation of individual school budgets in the LA as calculated by the NFF. However the actual allocations to schools will continue to be determined via a local funding formula. The DfE will use 2017/18 and 2018/19 to “Refine and improve” the NFF based on 2017/18 and 2018/19. There will be a school level NFF in 2019/20 – the “vast majority” of funding will be determined nationally.
4. A fourth DSG block will be created entitled ‘central schools’ which will include funding for central school services, historic spending commitments and the retained rate of ESG. The amount within this block for each LA will be calculated “on a simple formulaic basis”. Linked to this creation of a Central Schools block, all schools block funding will be required to be passed on to schools.
5. There will be no significant changes to allowable funding factors for schools in 2017/18 and 2018/19. However, in 2019/20 the NFF at school level will no longer include the LAC, mobility and post 16 factors.
6. School cost factors that cannot be easily allocated on a formulaic basis will be allocated to LAs on the basis of historic spend in 2017/18 and 2018/19. These factors are rates, split sites, PFI, pupil growth, falling rolls and exceptional circumstances. The DfE will explore

BRIEFING PAPER

whether this funding could be distributed on a formulaic basis from 2019/20 and are proposing to look further at PFI on a scheme by scheme basis

7. The deprivation factor in the NFF is proposed to use a combination of IDACI and FSM. Pupil Premium will remain separate to NFF for the duration of this parliament.
8. The DfE's intention is to continue to fund rates so as to match charges to schools, so no net impact upon school budgets.
9. The DfE will use expenditure in each of the 3 blocks as their starting point rather than the amount of funding allocated to the LA in each block. For this purpose the DfE will re-baseline the 4 blocks for each LA so that each block aligns with the pattern of each LA's planned spending in 2016/17.
10. There will be a national MFG and cap on gains in 2017/18 and 2018/19 but LAs may be allowed to use different local versions, as some LAs will receive less funding in 2017/18 than 2016/17, making local application of national percentages unaffordable.
11. No de-delegation will be allowed after 2018/19. There will be an Invest to save fund in 2016/17. Schools will be free to decide how best to use this funding e.g. the cost of restructuring a school's workforce.
12. In advance of introducing the school level NFF in 2019/20, the DfE will review the role, functions and membership of schools forums.
13. With regard to the provision of home to school transport, assessing pupils with SEN, and the planning for and supply of sufficient school places, funding for these functions not in scope of this consultation.
14. The DfE expect LAs to step back from running school improvement from the end of the 2016/17 academic year and will say more about this shortly.
15. LAs will be able to retain some maintained schools block DSG for statutory duties, but only with the agreement of maintained schools on the Schools Forum. If the LA cannot obtain the Forum's agreement then the Secretary of State makes the final decision.
16. The general element of Education Services Grant (ESG) will be paid to LAs at a reduced level between April 2017 and August 2017 and then entirely cease. The reduced transitional rate between April 2017 and August 2017 will be confirmed in stage 2 of the consultation process.
17. There are 25 consultation questions. Southampton city council's response to these questions is available as an appendix.

Summary of proposed High needs funding formula factors

18. It is right that this consultation is in parallel to the national funding formula for schools consultation as the two areas of funding and responsibility are inter-linked. There is a

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Agenda Item 6

SCHOOLS FORUM

PROVISIONAL PROGRAMME OF WORK

Programme	Date	Meeting date
Update on Secondary school expansion Provisional Programme of Work/ Dates for 16/17 Response to Stage 1 Consultation (Schools National Funding Formula)	April 2016	27/04/2016 (Regents Park School booked)
Schools Balances Education and Early Year Capital Programme Update on Secondary school expansion Verbal update on Schools in Financial Difficulty Fund	June 2016	22/06/2016 (Testlands Hub booked)
Election of Chair Register of Interests Update on Secondary school expansion Membership of the Forum – Terms of Reference Updates to School Funding Formula 2017/18* Response to Stage 2 Consultation (Schools National Funding Formula) Children's Services Saving Proposals update*	September 2016 (AGM)	14/09/2016 (Testlands Hub booked)
Update on Secondary school expansion Scheme for Financing Schools SLA's 2017/18 Verbal update on Schools in Financial Difficulty Fund	October 2016	19/10/2016
Update on Secondary school expansion Schools, High Needs & Early Years block 2017/18 budget including agreement by Schools forum for all central expenditure and de-delegated budgets from Schools Block. Verbal update on Schools in Financial Difficulty Fund	January 2017	11/01/2017 18/01/2017
Update on Secondary school expansion Support for Schools in Financial Difficulties fund Special School Top-up rates 2017/18	March 2017	8/03/2017
Schools Balances Education and Early Year Capital Programme Update on Secondary school expansion	June 2017	28/06/2017

Programme	Date	Meeting date
Election of Chair Register of Interests Update on Secondary school expansion Membership of the Forum – Terms of Reference Updates to School Funding Formula 2017/18* Response to Stage 2 Consultation (Schools National Funding Formula) Children’s Services Saving Proposals update*	Sept 2017 (AGM)	13/09/2017

*If required

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