



SCHOOL FORUM

MEETING ON THURSDAY 27TH SEPTEMBER 2018

08:30 at Witton Park CLC

AGENDA

1. WELCOME AND INTRODUCTIONS
2. MINUTES OF THE PREVIOUS MEETING – held on 19th June 2018
3. MATTERS ARISING
4. VACANCIES AND APPOINTMENT OF CHAIR FOR 2018-19 ACADEMIC YEAR
5. SCHOOLS BENCHMARKING 2017-18 – paper to be tabled
6. NOTIONAL SEN FUNDING 2018-19 – paper attached
7. DELEGATED FUNDING FOR 2019-20 – paper attached
8. TRANSFER OF FUNDS TO HIGH NEEDS BLOCK 2019-20 – verbal update
9. ANY OTHER BUSINESS
10. DATES FOR 2018-19 ACADEMIC YEAR MEETINGS
 - 22 November 2018
 - 10 January 2019
 - 07 February 2019
 - May 2019
 - July 2019

Prepared by: Schools & Education Finance Team



SCHOOLS FORUM MEETING MINUTES

HELD ON 19 JUNE 2018

Position	Attendee	19 Jun 2018	27 Sep 2018	22 Nov 2018	10 Jan 2019	7 Feb 2019	May 2019
Chairing the meeting							
Chair	Diane Atkinson	✓					
Vice Chair	Brian Peacock						
18 School Members		Appointed Members		Meetings attended			
8 Maintained Schools reps - 1 Secondary, 4 Primary, 1 Special, 1 Nursery and 1 PRU Headteacher places							
Secondary Headteacher	Diane Atkinson	✓					
Primary Headteacher	Elizabeth Hargreaves	x					
Primary Headteacher	Susan Aldred	✓					
Primary Headteacher	Michelle Smith	✓					
Primary Headteacher	Carolyn Lord	A					
Special Headteacher	Geoff Fitzpatrick	Deputy					
Nursery Headteacher	Gillian Crompton	A					
PRU Headteacher	Jo Siddle	x					
1 Free School reps							
Free School	Hannah Speakman	x					
4 Governors – 1 Secondary and 3 Primary Governors							
Secondary Governor	Helen Holden	✓					
Primary Governor	Brian Peacock	✓					
Primary Governor	Pauline Lovick	✓					
Primary Governor	Lilian Salton	x					
5 Academy reps – 2 Secondary, 1 Primary, 1 Special and 1 Alternative Provision Headteacher places							
Secondary Academy	Dean Logan	✓					
Secondary Academy	Brendan Loughran	✓					
Primary Academy	Donna Simpson	Deputy					
Special Academy	Sharon Roscoe	x					
Alt' Provision Academy	Gary Holding	x					
4 Non School Members – 1 Teacher Unions, 1 Non-Teaching Unions, 1 Post 16 FE College and 1 Early Years Provider representatives							
Teacher Unions	Simon Jones	✓					
Non-Teaching Unions	Paul Crewe	✓					
Post 16 FE College	VACANT						
Early Years Provider	Tracy Ellett	x					
School Forum Members present		12					
<i>Quorate 40% of filled posts</i>		9					
In Attendance							
LA Officers	Jessica Byrne	✓					
LA Officers	Adam Clarkson	✓					
LA Officers	Kirsten Reid	✓					
LA Officers	Mary Parker	x					
Council Members	CLlr Dave Harling	x					
Council Members	CLlr Maureen Bateson						
Total		3					

1. Welcome and Introductions

Diane Atkinson (the Chair) welcomed everyone to the meeting

2. Apologies for absence

A request to accept Apologies for Donna Simpson (who has requested a deputy head attend as her representative), Carolyn Morris, Gillian Crompton. Geoff Fitzpatrick also asked for his apologies to be accepted and requested that Caroline Richens attend as his representative.

3. Minutes from the previous meeting

It was agreed that the Minutes from 22 February 2018 be accepted as a true and accurate record of the meeting.

4. Matters Arising

The Schools Forum asked the Authority to investigate the schools placements figures for Eden and The Heights.

The representative for Alternative Provision Academies advised Schools Forum that 35 places had been commissioned from the LA and not 24 as reported in the meeting held on 22 February 2018. The number of places commissioned at The Heights was reported at that meeting as 100, but the Alternative Provision Academies representative advised this had increased to 120.

The meeting for 19 July 2018 to discuss benchmarking was cancelled to addressed in September instead.

5. Schools reserves reporting for 2017/18 (paper)

Voting: 2 votes to be taken

Kirsten went through the paper and the members of the Schools Forum discussed the results. The number of schools with negative reserves had increased from 4 in at 31 March 2017 to 6 at 31 March 2018.

Five schools were found to be carrying reserves in excess of the agreed limits and the excess amount was automatically clawed back. The schools in question had not realised that the clawback would take place, as this was the first year to trigger the clawback process. It was noted that prior to changing the reserve policy, consultations took place with all schools. Members did not wish to return to the time consuming process of reviewing all schools with excess reserves, but requested that the LA consider additional measures to raise awareness of a potential clawback.

A member suggested that Pupil Premium held at the year end should be excluded from the reserves calculation. This is not stated in the current Scheme For Financing Schools. The increase in the percentage of reserves schools are allowed to hold allowed greater flexibility for schools to carry forward funds such as Pupil Premium and to build up reserves for specific projects to be completed over an academic year, rather than a financial year.

Members expressed concern that all the nursery schools had negative reserves. Additional information on the nursery schools is to be provided at the next meeting.

Action: LA to send out School Fund Allocation spreadsheets in December to enable schools to verify that all income is recorded. Members agreed that the SEN pupil update is to be sent out at the same time.

Action: LA to provide additional information on the Nursery schools.

School representatives are asked to approve of the additional factor applied to determining excess reserves for the amounts held at 31 March 2018 of excluding funds held on behalf of other schools for the calculation.

Vote taken and recommendation approved. Funds held on behalf of other schools such as SIG monies and SSIF should be excluded. The Group leader schools will be contacted at the year end to confirm balances held.

School representatives are asked to consider if any changes are required to the mechanism to determine excess reserves in 2018/19.

Vote taken and no changes required

6. AOB

Next Schools Forum Meeting will be the 20th September at the new time of 08:30 as this is preferred by the majority of the Schools Forum members.

Action: Schools Forum members requested that additional information should be provided at the next meeting to explain how the SEN funding is allocated to schools.

SCHOOL FORUM - BRIEFING PAPER

SCHOOL BENCHMARKING 2018-19

1. Purpose

- 1.1. To provide Schools Forum with benchmarking information on how Blackburn with Darwen's school funding formula for 2018-19 compares with other Local Authorities across England.

2. Recommendations

- 2.1. School Forum is asked to note the details of the benchmarking exercise and comment on which formula factors, if any, need reviewing for 2019-20 financial year**

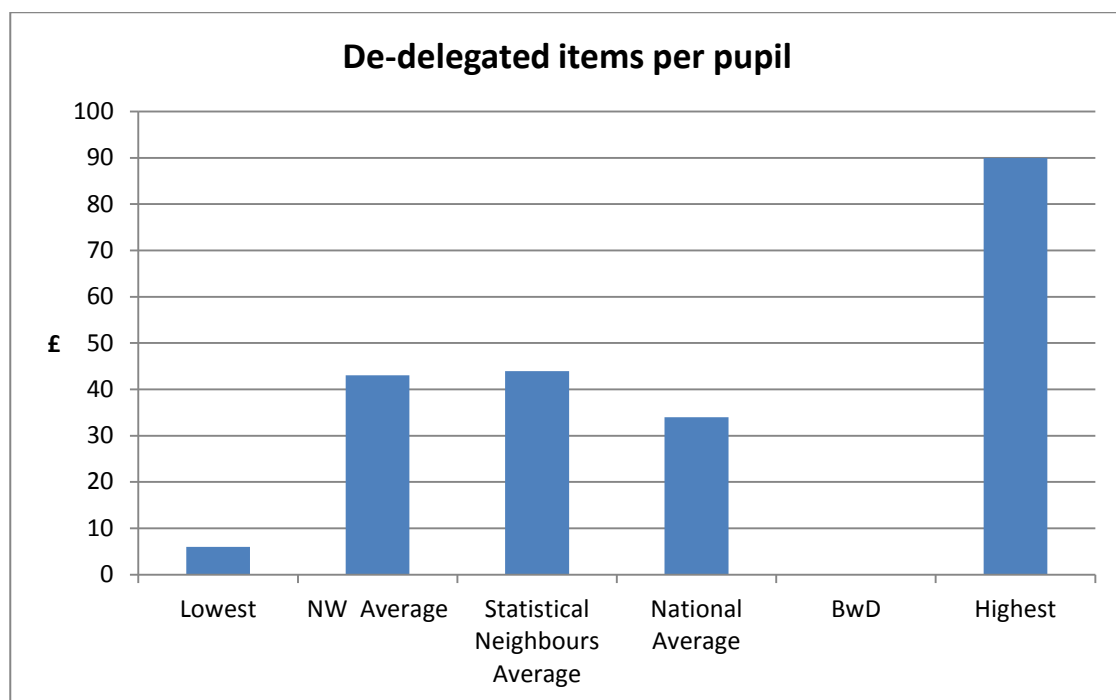
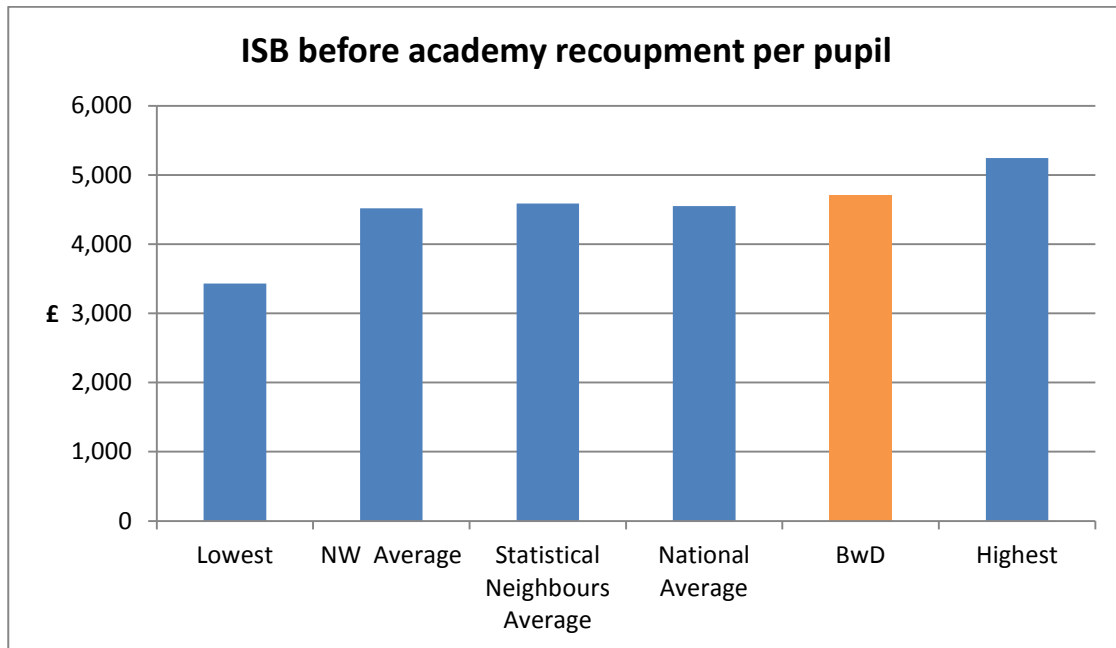
3. Background

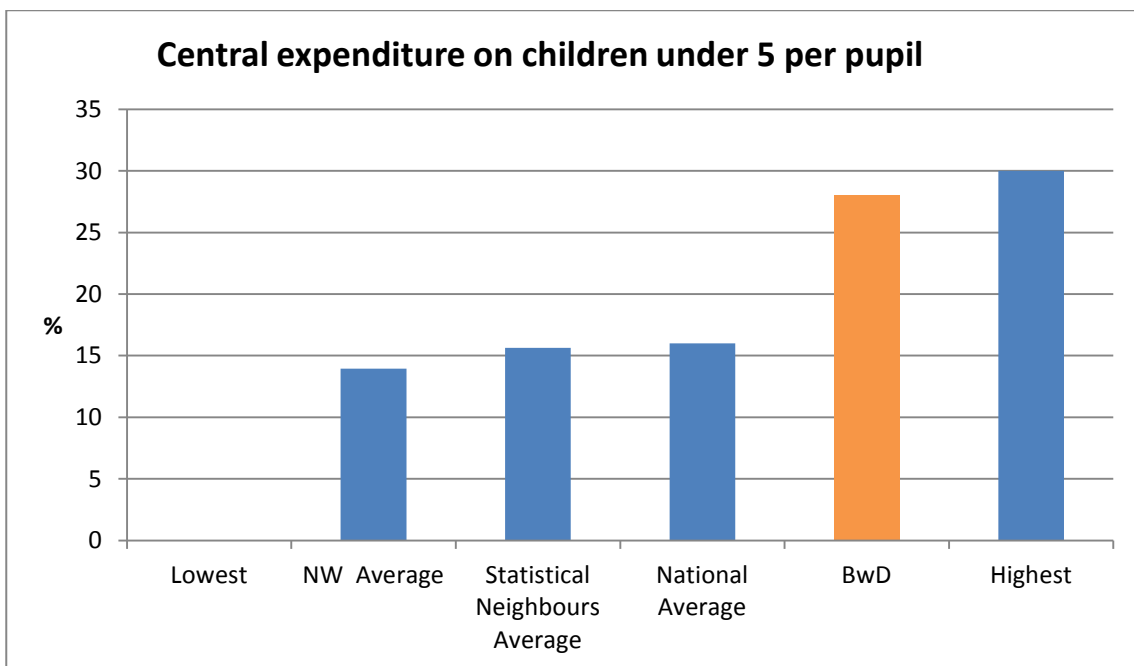
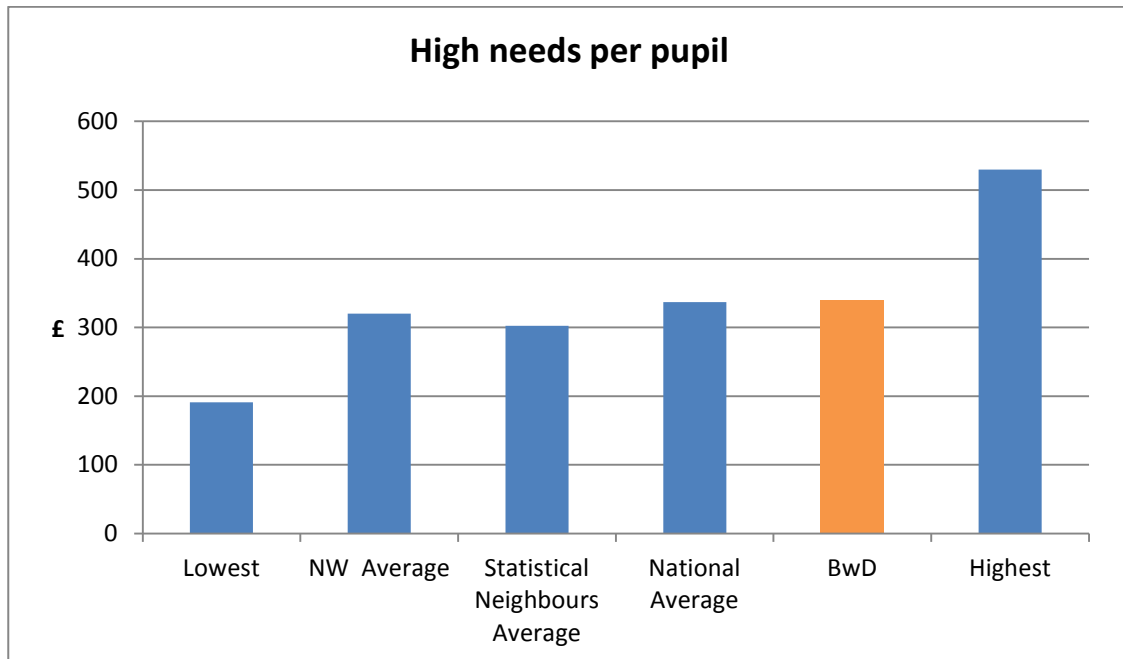
- 3.1. Since the school funding formula reforms in 2013, the LA has carried out benchmarking exercises to monitor the schools funding factors against national averages and statistical neighbours.
- 3.2. With some local authorities already adopting the national funding formula, continued benchmarking provides Schools Forum with information on the current situation of transition towards full NFF. This will assist in setting either a local funding formula or national funding formula budget in 2019-20.
- 3.3. In 2018-19 Blackburn with Darwen applied a local funding formula that adopted a number of the national funding formula factors, but set their own rates per factor.
- 3.4. The benchmarking information provided by DfE is based on the S251 outturn returns submitted by LA's for the 2017-18 year.
- 3.5. Charts of the headline figures are attached to this report for review.

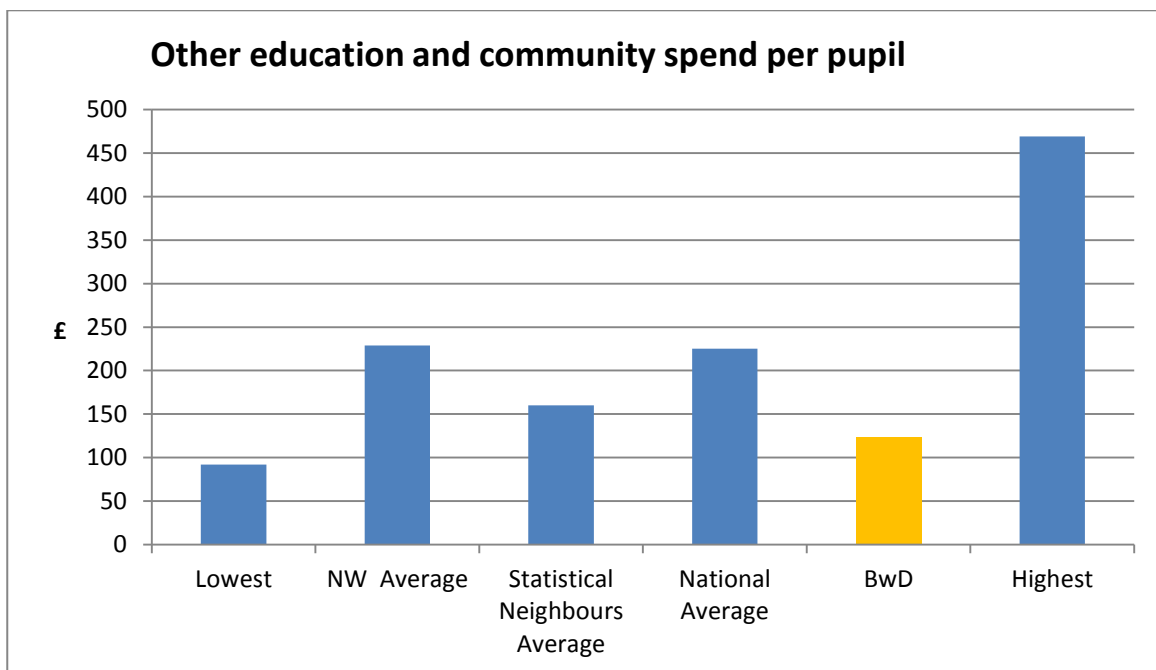
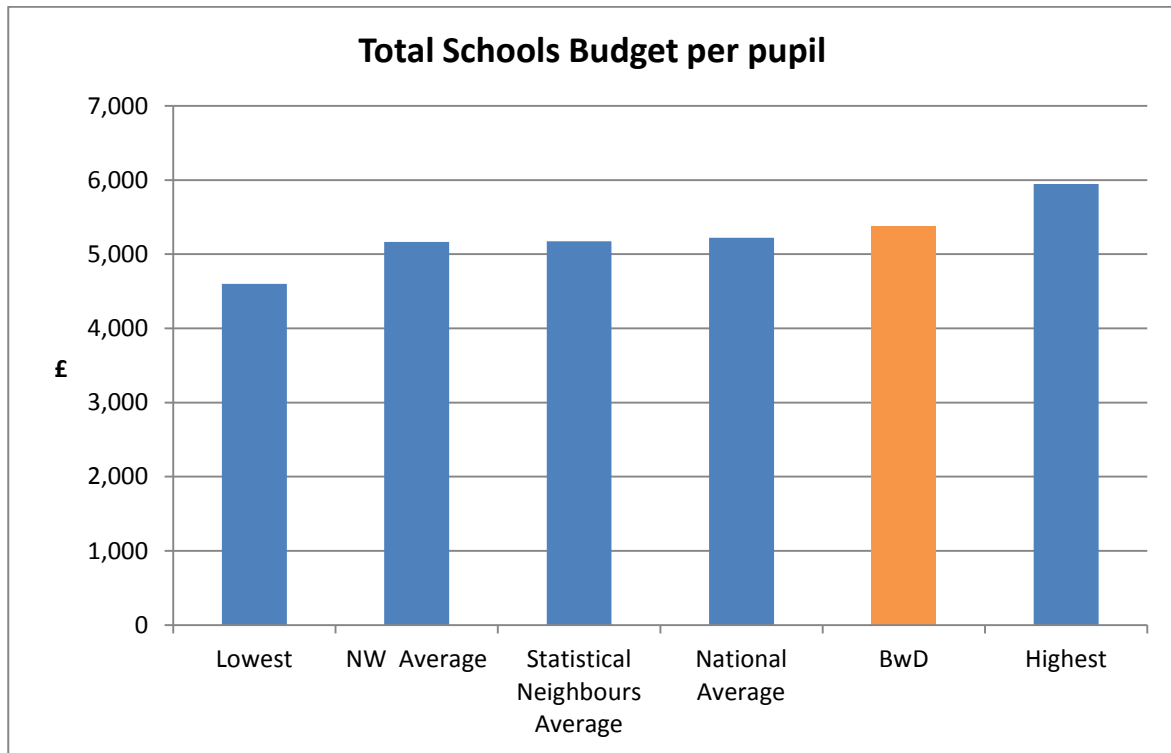
The School and Education Finance Team
September 2018

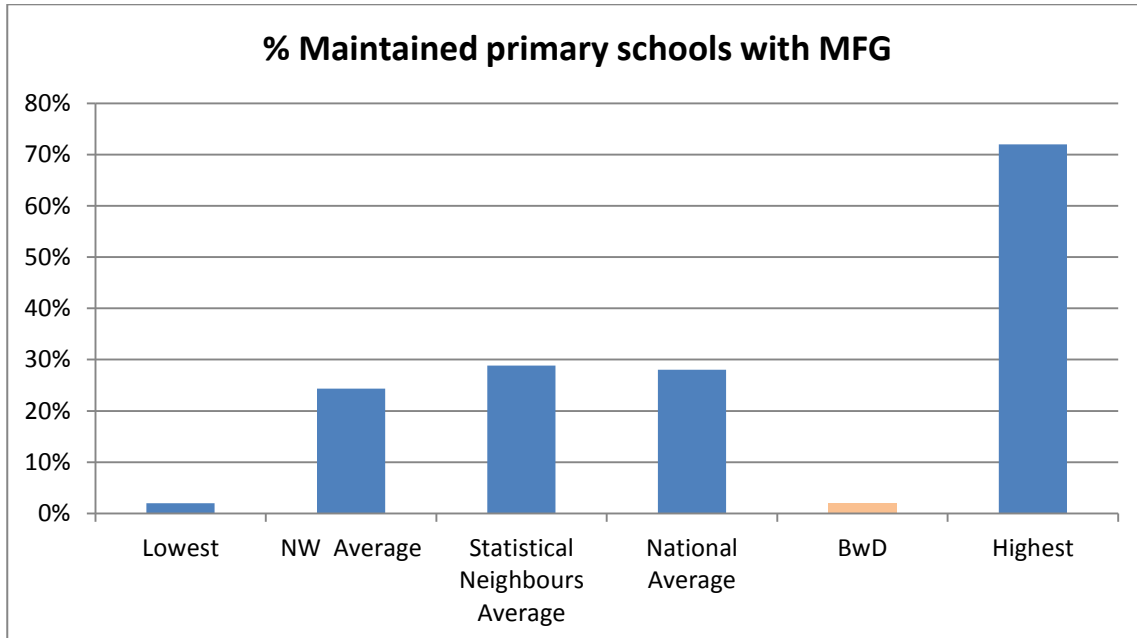
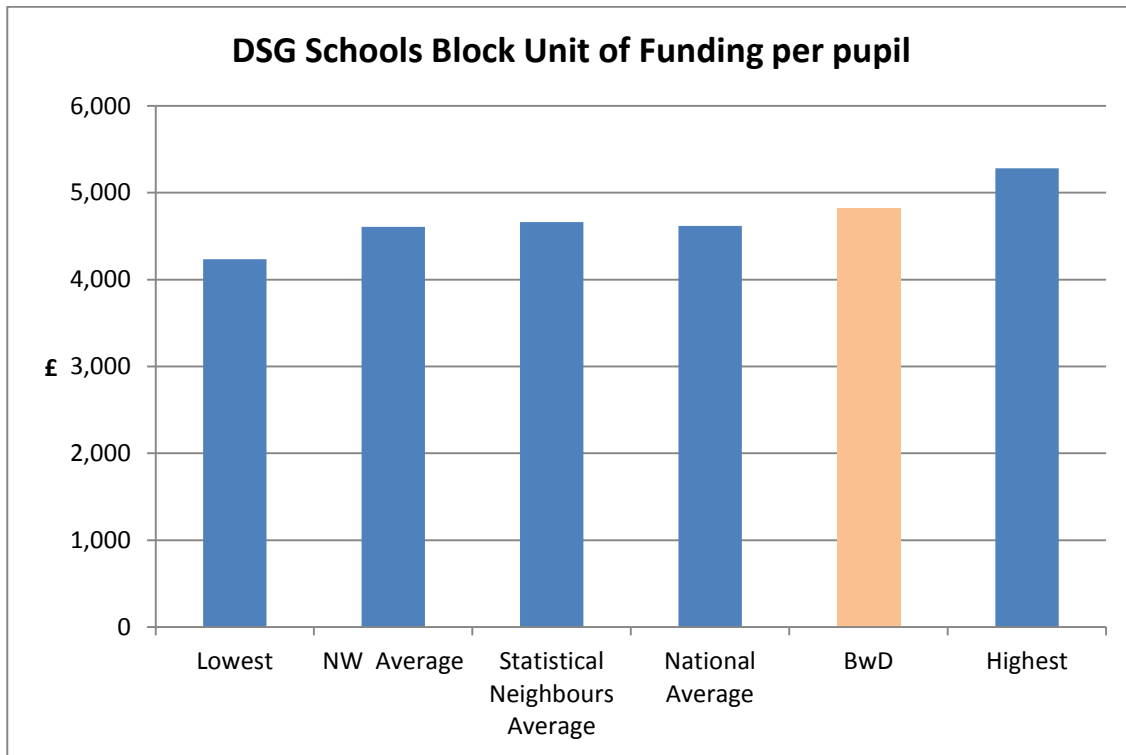
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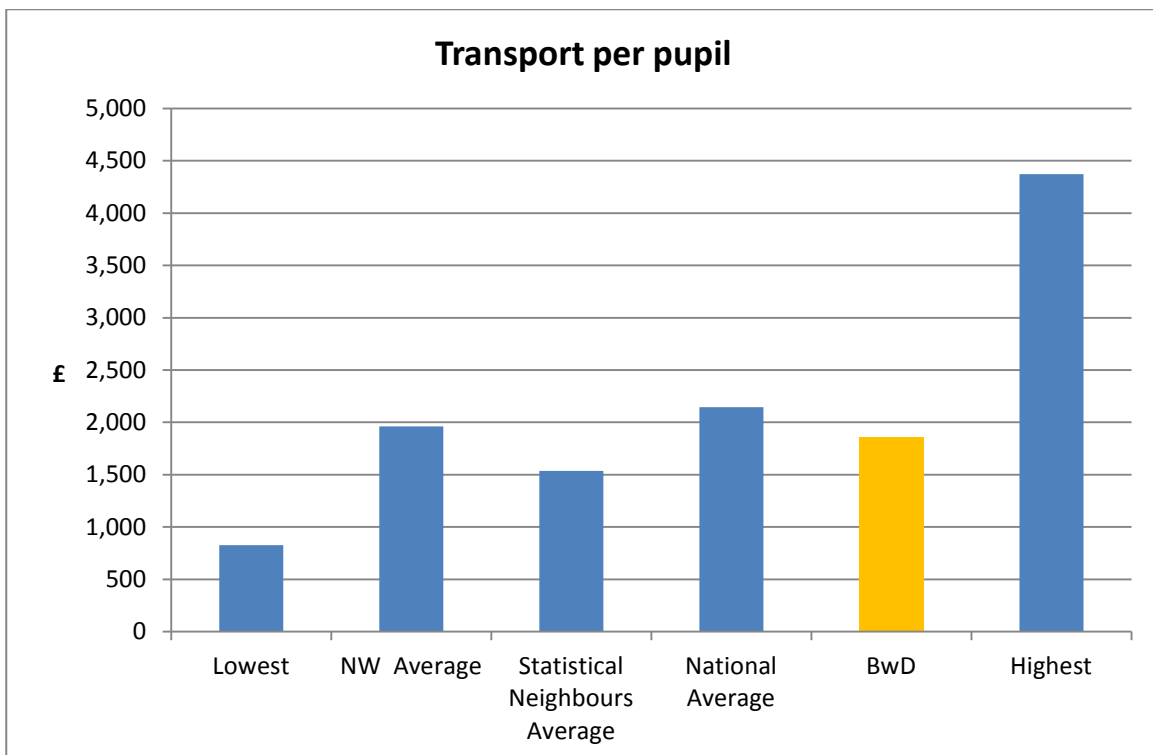
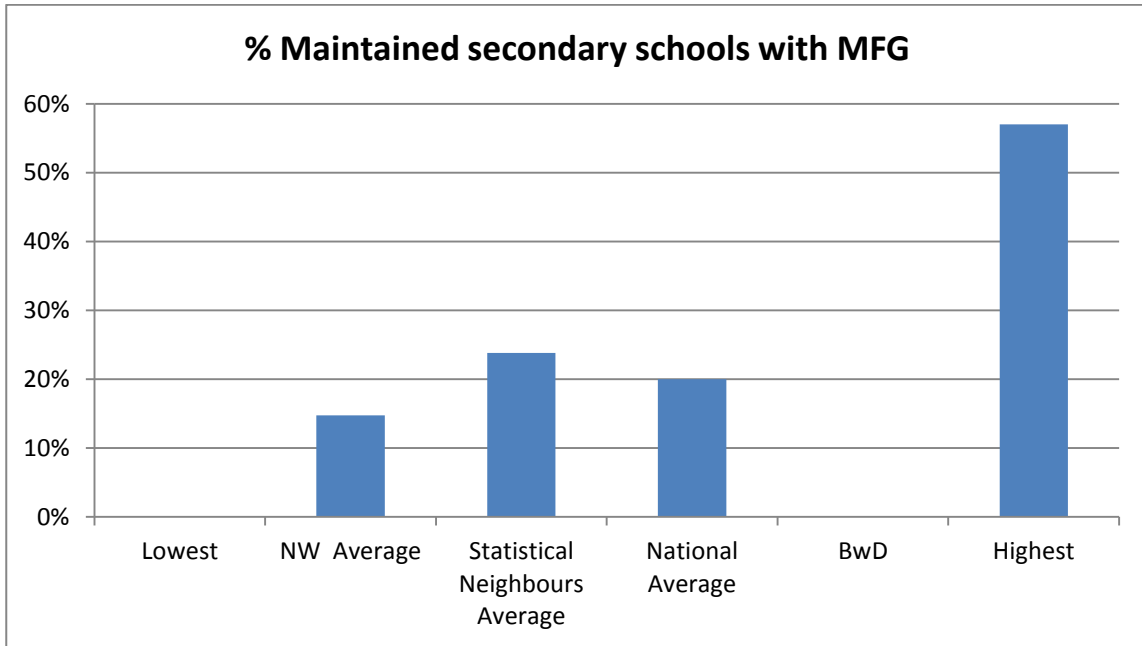
CHARTS COMPARING NATIONAL; NORTH WEST LA'S, STATISTICAL NEIGHBOURS AND BLACKBURN WITH DARWEN S251 OUTTURN 2017-18

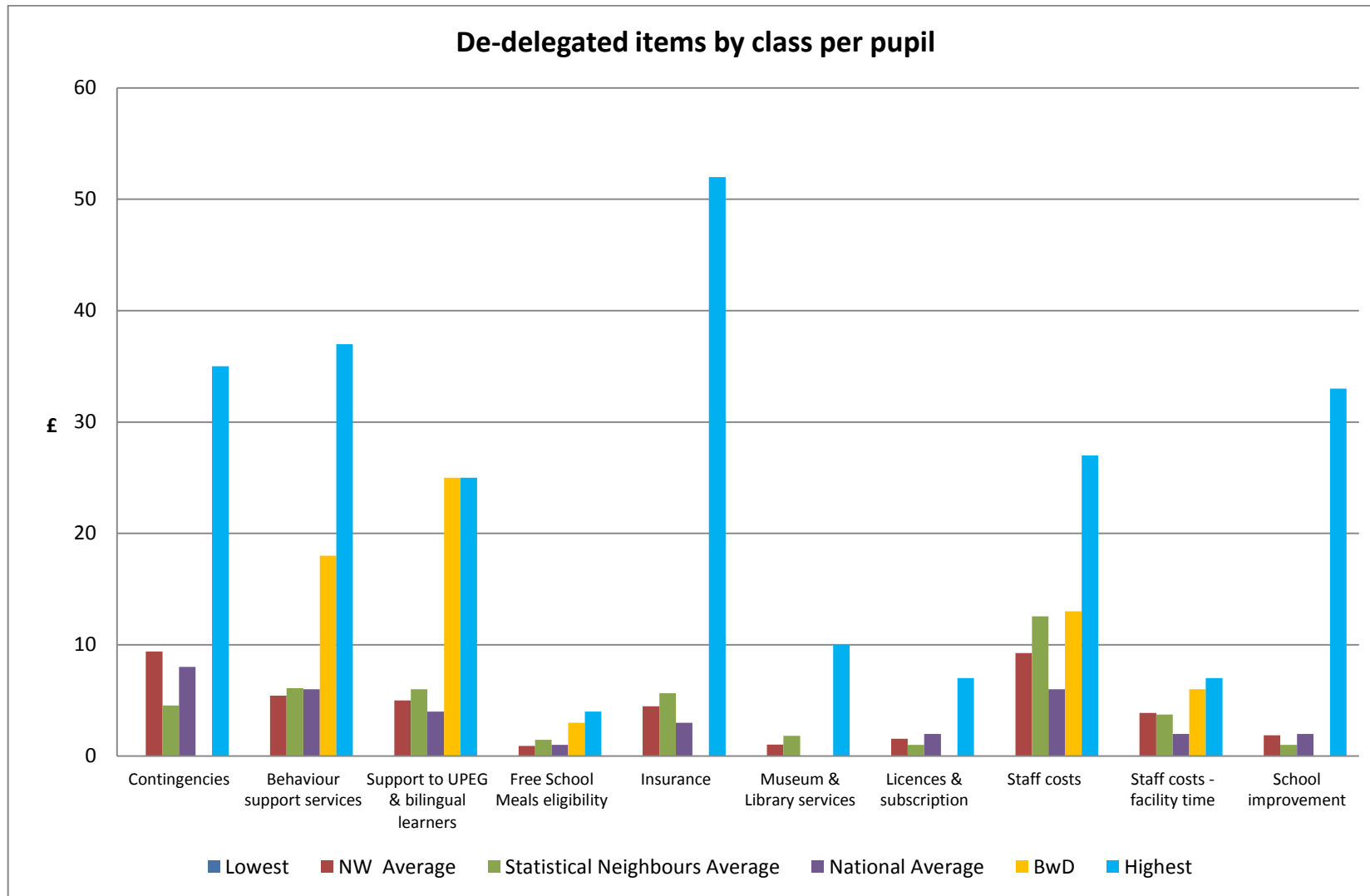












SCHOOL FORUM - BRIEFING PAPER

SEN NOTIONAL FUNDING

1. Purpose

- 1.1. To provide an update to the Schools Forum on how the SEN notional funding is calculated in 2018-19 financial year.

2. Recommendations

- 2.1. School Forum members are asked to note and comment on this report.**

3. Background

- 3.1. SEN notional funding is calculated each year which is included in the overall ISB allocations. Based on the notional funding each school is expected to use up to 50% of the funding for high needs pupils. High needs pupils are those with an EHCP, IPRA or statement.
- 3.2. The number of pupils the notional SEN is to fund is reviewed each year to ensure that schools are not expected to fund significant variances in pupil numbers each year.
- 3.3. The funding is notional and schools may not have any high needs pupils attending.
- 3.4. Additional funds to either top up an agreed EHC plan or to fund the basic £6,000 per high needs pupil will be allocated to a school as required. Any additional £6,000 per pupil is provided on a pro-rata basis and only after the estimated number of pupils covered by the notional SEN funding is exceeded.
- 3.5. The SEN notional funding is used to determine Educational Psychologist support to schools.
- 3.6. If no adjustment is made to the way in which the LA calculates the notional SEN, the changes in the ISB due to the National Funding Formula will alter the level of notional SEN funding and hence the number of pupils to be supported before additional payments are made to schools.

4. Summary of funding allocated in 2018/19

- 4.1. Following changes in the method used to calculate high needs funding in 2013 the LA determined that the notional SEN should be calculated by applying an agreed formula. The formula takes a percentage of the AWPU, deprivation factors and Low Prior Attainment to calculate the funds available within a schools budget to support pupils with high needs. The KS2 AWPU factor was originally assessed as £54.34 from the £3,001.20 per pupil or 1.8% of the AWPU. KS3 and KS4 AWPU factors were £70.42 per

pupil. Supporting notes from the original workings show this was based on the AWPU's for KS3 £3,883.68 and KS4 £4,781.17 and averaged around 1.7% of the total AWPU funding per pupil.

- 4.2. This information is as accurate as possible based on interpretation of available working papers. Successive years have slightly altered the percentage of AWPU applied to the notional SEN as the amount per pupil relating to high needs has not changed but the AWPU varies year on year.
- 4.3. The table below summarises the factors used to determine the notional SEN funding in 2017-18 and 2018-19 financial years. In order to ensure that schools were not adversely affected by the funding changes in 2018-19 the deprivation factors applied were decreased. The revised factors caused an increase per school which the LA restricted to one or two high needs pupils

Table of notional SEN funding factors

Funding factor	Notional SEN % of unit rates 2017-18	Notional SEN % of unit rates 2018-19
Primary schools		
AWPU	1.76%	1.80%
FSM6	50.00%	45.00%
IDACI Band A	50.00%	45.00%
IDACI Band B	50.00%	45.00%
IDACI Band C	50.00%	45.00%
IDACI Band D	50.00%	45.00%
IDACI Band E	50.00%	45.00%
IDACI Band F	50.00%	45.00%
LPA	100.00%	50.00%
EAL	0.00%	0.00%
Lump Sum	0.00%	0.00%
Sparsity	0.00%	0.00%
LAC	0.00%	0.00%
Mobility	0.00%	0.00%
Secondary schools		
AWPU	1.75%	1.80%
AWPU	1.43%	1.45%
FSM6	50.00%	45.00%
IDACI Band A	50.00%	45.00%
IDACI Band B	50.00%	45.00%
IDACI Band C	50.00%	45.00%
IDACI Band D	50.00%	45.00%
IDACI Band E	50.00%	45.00%
IDACI Band F	50.00%	45.00%
LPA	100.00%	90.00%
EAL	0.00%	0.00%
Lump Sum	0.00%	0.00%
Sparsity	0.00%	0.00%
LAC	0.00%	0.00%
Mobility	0.00%	0.00%

5. Summary of funding allocated in 2018/19

5.1. The table below summarises the estimated number of pupils in 2017-18 and 2018-19 with high needs to be supported through the notional SEN. This can be compared to the actual number of pupils with high need that schools supported.

Number of pupils with high needs.

SEN Notional Numbers	Estimated 2017	Actual 2017	Estimated 2018	Actual as at July 2018
Maintained primaries	352	404	446	387
Academy primaries	36	23	46	21
Free Schools	12	10	17	11
Maintained Secondaries	177	61	182	74
Academy Secondaries	308	168	294	101
Free Schools	46	23	50	19
Total	931	761	1035	613

5.2. The National Funding Formula has a lower AWPU than the amounts used by Blackburn with Darwen in the Local Funding Formula. Rates for deprivation, low prior attainment and English as an additional language are higher. Therefore due to this change in emphasis as the NFF is applied to schools in future years using the current factors for notional SEN will lead to an increase in the number of pupils with high needs that schools will be expected to support. Consideration will therefore be given to both the rising number of pupils with high needs in Blackburn with Darwen LA and the consequential pressure on the high needs block as well as the budgetary pressures faced by schools in determining notional SEN.

The School and Education Finance Team
September 2018

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SCHOOL FORUM - BRIEFING PAPER

DELEGATED FUNDING OPTIONS IN 2019-20 SCHOOLS BUDGET SHARES

1. Purpose

- 1.1. To provide an update to the Schools Forum on the funds that can be de-delegated from 2019-20 schools budget shares and advise on arrangements set out by DfE regarding the approval of over or underspent de-delegated services.
- 1.2. To enable Schools Forum to consider the services to be de-delegated in 2019-20.

2. Recommendations

- 2.1. Maintained primary and secondary representatives are asked to note and comment on this report.**
- 2.2. Maintained primary and secondary representatives are asked to formally approve which services will be considered for de-delegation in 2019-20.**

3. Background

- 3.1. De-delegated services can still only be agreed for maintained primary and secondary schools with schools forum approval. Local Authorities may offer the service on a buy-back basis to those schools and academies in their area that are not covered by the de-delegation.
- 3.2. In the case of special schools and PRU's the funding to buy such services will be included in any top ups.
- 3.3. Any decisions to de-delegate during 2018-19 will be for that year only. New decisions are required for any service to be de-delegated in 2019-20.
- 3.4. School forum members for primary maintained and secondary maintained schools must decide separately for each phase whether the service should be provided centrally and the decision will apply to all schools in that phase. Fixed contributions for each service are to be agreed to be able to remove funding from the formula before school budgets are issued.

4. Services that can be de-delegated in 2019-20

- 4.1. For each service de-delegated, local authorities will need to make a clear statement of how the funding is being taken out of the formula. For example the rate per pupil will be listed by service.

- 4.2. There should be a clear statement of how contingencies and other resources will be allocated. Academies will continue to receive a share of funding for these services in their delegated budgets.
- 4.3. A list of the possible services that can be de-delegated is shown below.
- 4.3.1. Additional school improvement services
 - 4.3.2. Contingencies including schools in financial difficulties and deficits of closing schools
 - 4.3.3. Behaviour support services
 - 4.3.4. Support to underperforming ethnic groups and bilingual learners
 - 4.3.5. Free schools meals eligibility
 - 4.3.6. Insurance
 - 4.3.7. Museum and library services
 - 4.3.8. Licences/subscriptions other than those paid for by DfE
 - 4.3.9. Staff costs supply cover (for example, long term sickness, maternity, trade union and public duties).
- 4.4. The table below lists the de-delegated items agreed for 2018-19. Should Schools Forum agree to change the services de-delegated in 2019-20, the LA will provide a report on the costs of the proposed changes and consult with maintained primary and secondary schools headteachers to enable Schools Forum to make an informed final decision at a later meeting.

De-delegated services 2018-19

Service	Primary rate per pupil	Secondary rate per pupil
	£	£
Free School Meals	11.38	11.38
Staff costs – maternity	16.00	16.00
Staff costs – trade union	7.50	7.50
Gypsy Roma Traveller Team	0.00	0.00
Total	34.88	34.88

- 4.5. Any unspent de-delegated funding remaining at the year end should be reported to schools forum. Funding may be carried forward to the following period as with any other centrally retained budget and can be used specifically for de-delegated services if the LA wishes.
- 4.6. If there is a brought forward overspend on de-delegated services from the prior year, for example from 2018-19 then schools forum has to specifically approve funding of this overspend for the next year's budget (ie 2019-20) as a separate decision from any decisions on the overall underspend or overspend of central expenditure.

The School and Education Finance Team
September 2018
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