

Schools Forum

**11 October 2012
4.00pm**

Sapphire Room, Emerald Suite
North London Business Park

Agenda, Papers and
Minutes of the last meeting

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AGENDA

SCHOOLS FORUM 11 OCTOBER 2012

Meeting to start at 4pm with no training session

1. Apologies for absence
2. Election of Chair and Vice Chair
3. Declarations of interest
4. Statement of constitution
5. Minutes of previous meeting: 12 July 2012
6. Matters arising
7. Schools Forum Terms of Reference – Carol Beckman
8. Schools budget 2012/13 – Anisa Darr/Carol Beckman
 - 8.1. *Funding Formula 2013/14*
 - 8.2. *Schools Budget Monitoring 2012/13 (30 June 2012)*
9. Schools Block
 - 9.1. *Funding Formula 2013/14*
 - 9.2. *De-delegation – Carol Beckman*
10. High Needs Block
 - 10.1. *SEN/ High Needs Block – Carol Beckman/Brian Davis*
11. Early Years Block
 - 11.1. *Nursery School proposals – Carol Beckman*
12. LACSEG – Carol Beckman
13. Agreement of agenda for next meeting
14. AOB

SCHOOLS FORUM MEMBERS

Sector	Position	Name	School	Member Until
Nursery Schools (1)	Headteacher	Jane Chew	St Margaret's	07 Dec 2013
Primary Schools (11)	Community – Headteacher 1	Jeanette Adak	Monkfrith	30 Sep 2013
	Community – Headteacher 2	Helen Schmitz	Cromer Road	30 Sep 2013
	Community – Headteacher 3	Susan Convery	Whitings Hill Primary School	30 Sep 2014
	Community – Headteacher 4	Sally Lajalati	Colindale	30 Sep 2014
	Community – Governor 1	Liz Pearson	Holly Park & Livingstone	30 Sep 2013
	Community – Governor 2	Kim Garrod	Church Hill	07 Dec 2013
	Community – Governor 3	Catrin Dillon	Martin Primary	07 Dec 2013
	VA – Headteacher 1	Clare Neuberger	Menorah Foundation	30 Sep 2013
	VA – Headteacher 2	Dee Oelman	St Mary's & St John's	30 Sep 2013
	VA – Headteacher 3	Tim Bowden	Holy Trinity	30 Sep 2013
	VA – Governor	Anthony Vourou	St John's N11	30 Sep 2013
Foundation / VA Governor	Janet McIntyre	Christ Church CE	30 Sep 2014	
Secondary Schools (8)	VA – Headteacher	Seamus McKenna	Finchley Catholic	31 Nov 2013
	VA – Governor	Patricia French	St Mary's High	07 Dec 2013
	Community	Jeremy Turner	Friern Barnet	31 Nov 2014
	Foundation / Trust – Governor	<i>Vacancy</i>		
Special Schools	Governor	Gilbert Knight (Chair)	Oakleigh	30 Sep 2013
	Headteacher	Jenny Gridley	Oakleigh	30 Sep 2013
Academies	Academy / Principal	Michael Whitworth	Wren Academy	30 Nov 2013
	Academy / Principal	Angela Trigg	London Academy	30 Sep 2013
	Academy / Principal	Kate Webster	Queen Elizabeth Girls	30 Sep 2013
	Academy / Principal	Paul Ferrie	Totteridge Academy	30 Sep 2013
	Academy / Principal	Geoffrey Thompson	Mill Hill High	30 Sep 2013
Stake-holders	14-19 Partnership	Keith Murdoch	Woodhouse	30 Sep 2013
	Private Early Years	Sarah Vipond	Middlesex University	30 Sep 2013
	Unions	Keith Nason	Union representative	
	Stakeholder	Shelley Dannell	Head Teacher – Pavilion	
Non Voting Observers	Cabinet Member for Children	Cllr Andrew Harper	Deputy Leader	
	Director of Adult Social Care and Interim Director of Children's Services	Kate Kennally	Children's Service	
	Consultant to Schools Forum	Geoff Boyd	Consultant	
Barnet Officers	Deputy Chief Executive	Andrew Travers	Finance Directorate	
	Assistant Director	Val White	Children's Service	
	Assistant Director, Schools and Learning	Mick Quigley	Children's Service	
	Principal Education Psychologist	Brian Davis	Children's Service	
	School Funding Manager	Carol Beckman	Finance Directorate	
	Schools Finance Services Manager	Nick Adams	Finance Directorate	
	Assistant Director, Assistant Director - Financial Services	Maria Christofi	Finance Directorate	
	Clerk and minutes	Mark Callaghan	Finance Directorate	
EFA Observer	Education Funding Agency	Sue Samson / Bev Pennekett		

4. STATEMENT OF CONSTITUTION

Later in the agenda, the Schools Forum will be asked to elect a chair and vice-chair, and to agree a revised terms of reference. In advance of this, members are asked to support the following resolution:

The Schools Forum resolves that it is correctly constituted to take decisions under the Schools Forum regulations which came into force on 1st October 2012.

5. MINUTES OF THE LAST MEETING

Meeting of the Schools Forum

Thursday 12 July 2012

(4.00 pm, Conference Room 1, Building 4, NLBP)

Attended

Members: Catrin Dillon (Governor, Martin Primary)
Clare Neuberger (Head, Menorah Foundation)
Dee Oelman (Head, St Mary's & St John's)
Elizabeth Pearson (Governor, Livingstone)
Gilbert Knight (Governor, Oakleigh)
Helen Schmitz (Head, Cromer Road)
Jane Chew (Head, St Margaret's Nursery)
Jeanette Adak (Head, Monkfrith)
Jeremy Turner (Head, Friern Barnet)
Kate Webster (Head, QE Girls)
Keith Nason (NUT)
Kim Garrod (Governor, Church Hill Primary School)
Paul Ferrie (Head, The Totteridge Academy)
Shelley Dannell (Head, Pavilion Pupil Referral Unit)
Susan Convery (Head, Whittings Hill)
Tim Bowden (Head, Holy Trinity)

LA Officers: Anisa Darr (Finance Manager, Children's & Adults)
Brian Davis (Principal Education Psychologist)
Carol Beckman (School Funding Manager)
Kerry-Anne Smith (Head of Finance, Children and Adults)
Mick Quigley (Assistant Director, Children's Service)
Val White (Assistant Director, Partnerships, Performance & Planning)

Observers: Maria Rosario (School Support Service Manager)
Nash Narenthira (NASUWT)

Not Present

Clerk: Claire Gray (Deputy School Funding Manager)

Members: Angela Trigg (Principal, London Academy)
Anthony Vourou (Governor, St John's N11)
Cllr Andrew Harper (Cabinet Member for Education, Children and
Geoffrey Thompson (Head, Mill Hill High)
Janet McIntyre (Chair, Christ Church)
Jay Mercer (Deputy Director for Children's Service, Safeguarding,
Prevention & Partnership)
Jenny Gridley (Head, Oakleigh)
Kate Kennally (Deputy Director, ASSD)
Keith Murdoch (Principal, Woodhouse College)
Michael Whitworth (Principal, Wren Academy)
Patricia French (Governor, St Mary's High)
Sally Lajalati (Head, Colindale)
Sarah Vipond (Early Years Working Group)
Seamus McKenna (Head, Finchley Catholic)

Consultant: Geoff Boyd (Independent Consultant)

1. Welcome and apologies for absence	
Apologies were received from Tony Vourou, Jenny Gridley, Geoff Boyd, Louis Smyth, Geoffrey Thompson, Patricia French, Keith Murdoch, Angela Trigg, Kate Kennally (replacing RMcG).	
2. Declarations of Interest	
None received.	
3. Minutes of previous meeting: 12 June 2012	
Catrin Dillon requested an amendment to show she is the Governor representative for Martin Primary School, not Headteacher as shown. The minutes were agreed as a true and accurate record of the meeting.	
4. Matters arising (not occurring elsewhere on the agenda)	
None.	
4.1 Actions from previous meeting	
Due to Jewish holidays on the currently proposed date, a new date for the Schools Forum will be arranged. CB will rearrange and advise members before the end of term. The Barnet formula funding consultation did go out after the presentation at last Schools Forum, but responses to date are low. Please could members respond before closing date, and encourage others to do so. Guidance is sought from all schools needed to determine any future school funding formula.	
5 ITEMS FOR DECISION	
5.1 2011/2 DSG Outturn	Kerry-Anne Smith
The provisional outturn reported on 20 th June 2012 was £549k, but latest figures now show a £2.1m underspend. This is mainly due to an overestimate of £1.7m in assumed academy recoupment. (The overall DSG ~£250m, academy recoupment was expected to be ~£40m but this was overestimated). There is also some movement in SEN lines as shown in papers, generating a small overspend of £37k overall in SEN total items. There are some savings due to delays in staff recruitment. There is also small underspend in other retained budgets. CB and KAS have now put procedures in place to monitor academy recoupment more closely in future. Schools Forum is asked to note the revised under spend. Budget figures and the projected outturn will be reconciled and will continue to be reported to Schools Forum on regular basis.	
5.2 Revised schools budget 2012/13	Kerry-Anne Smith
Schools Forum is asked to endorse the proposals for inclusion of the under spend mentioned above in the revised 2012/13 budget. There is a reduction in the 2012/13 DSG income budget (figures for this were not shown, as the pupil number data was not received from the DfE until after the Schools Forum papers had been circulated) as there are 88 pupils fewer than projected, mainly because of duplicate pupils at academies and pupils in PRUs being double counted. PF advised that academies are not aware of how to change or correct pupil data on COLLECT system, so will need further guidance on how to do this to prevent any recurrence in future. Schools Forum is asked to note the changes to 2012/13 budget figures and approve the continued (technical) breach of the CEL. Agreed unanimously.	
5.3 Use of underspend from 2011/12	Val White
In light of current pressures and overall budget available, the following proposals are being put forward: <ol style="list-style-type: none"> 1) The 2011/12 underspend of £500k will be used to cover the shortfall in funding as a result of corrections to pupil numbers. This would mean no reduction in budgets to schools where pupil numbers differ 2) Additional revenue funding of £240k will be needed to cover growth in pupil numbers; additional classes are still required for pressures in R/ Y1 for September 2012 3) Provision for school re-organisation, particularly the closure of St Mary's High and establishment of St Mary's & St John's all through school. There is a financial risk if pupil numbers reduce, and there may be pressure on revenue budgets at the school. The LA wishes to set aside £250k contingency in case any shortfall needs to be covered to ensure sustainability for existing pupils. 	

KN asked whether the funds could be used to cover payments to ensure retention of staff during the closure period. The Council is funding the standard Barnet redundancy costs, but the school must ensure revenue funding covers curriculum delivery for pupils remaining in the school. This contingency will not be used for retention of staff. PF sought clarification that if pupil numbers are known for setting FY 2013/14 budget, why an additional £250k might be required. VW advised that there is a concern that if a contingency is not set for this financial year, formula funding restrictions may prevent setting an amount aside in future; the contingency would be carried forward for this purpose only.

Items 1,2,3. Carried unanimously.

After allocating the above, there are two possible options for remaining funds:

4a) In light of the pressure on creating new pupil places in the Borough, the LA is seeking a contribution to the capital costs of the primary and secondary capital expansion programme

4b) An alternative option would be to distribute any remainder via the AWPU to all schools and academies; this would equate to approximately £15 per pupil

VW advised that Barnet is not unusual amongst LAs in asking schools for contribution to capital projects, depending on budget pressures in each area to ensure places for all children wishing to be educated in Barnet; this is a shared responsibility between LA and the schools community.

The 1st tranche of the expansion programme has been very successful; the 2nd tranche and identification of geographical locations is currently underway, in consultation with the Capital and Place Planning group. There is an assurance that funds will go into capital place planning; the expected growth in numbers will soon hit secondary schools, although the current impact is mainly on primaries.

Members acknowledged that £15 per pupil may not make significant difference to small primary schools, but may be viewed differently by larger secondary schools. The secondary school representatives commented that the additional distribution in 12/13 may have eased pressure on school budgets in areas where resources have been significantly reduced. VW advised that the majority of schools have set balanced budgets and have in fact increased revenue balances by £4m over the year. School members suggested that any agreement to give up this funding may lead the council to assume that schools are happy with current levels of funding.

Some members suggested a balanced option, using some of the underspend in capital place planning but still with some additional distribution to schools. It was also queried whether this money could be held centrally as an 'austerity fund' and distributed in 2013/14 AWPU, but under new funding restrictions this is not possible.

Members queried whether this amount is a significant contribution towards the overall cost of school capital projects. VW advised that there is a planned £19m investment for 2013/14, assuming that basic needs income from the government is at the same level as this FY. In future, plans will require investment of £40m at primary and £60m at secondary level; this will come from a range of sources including government funding, council borrowing and others.

Members were asked to vote on either option a, b or a new proposal [c], a 50/50 split between capital expansion and school distribution;

Votes in favour	4a) – 7 members
	4b) – 7 members
	4c) – 1 member

It was therefore left to the Chair to provide the casting vote, and this was for Option 4a (capital expansion programme)

The motion for Option 4a was therefore carried by 8 votes to 7.

6. Items for Consultation

6.1 DfE funding regulations for 2013/14

Carol Beckman

Although schools have not yet seen any new formula funding proposals, there is a great deal of work going on, as described in the additional paper circulated prior to the meeting by CB.

The decisions of the DfE have now been released, with the following changes to their initial proposals:

A growth fund will now be permitted, top sliced from the DSG (funding blocks) prior to the calculation of formula allocations. However, it should be noted that this fund will have to cover the cost of agreed academy expansions as well as maintained sector expansions.

Mobility has now been added as an allowable formula funding factor.

The maximum allowable under the lump sum factor has been increased to £200k.

There will now be MFG protection provided in the EYSFF, but this is only applied to the hourly rate, not on the other EYSFF supplements or the total amount of funding to nursery schools. This does not solve the problem in Barnet.

Further information is expected regarding funding for hospital schools as full details have not yet been released.

The School Funding team will be working to incorporate these proposals into the new funding formula once Barnet's consultation closes, and will provide a conference day in late September where new proposals will be presented to schools; there is insufficient time for a full consultation prior to next Schools Forum and submission of pro-forma to EFA. Autumn will be very busy, with an overlap between current and new systems in preparation for April 2013. If schools have any queries on the DfE guidance, they should raise them with the School Funding Team so that any unresolved issues can be raised with DfE.

BD advised that a series of meetings with Special School Heads, and further meetings with ARPs are underway, working on the true cost of high needs pupils/ places, including apportionment of whole school infrastructure and management costs. Discussions are ongoing regarding bandings of pupils, which will make implementation more straightforward, and this may be extended to include banding of statemented pupils in mainstream schools. Meetings/ workshops are being arranged for September at NLBP with contract officers, to assist schools in implementing service level agreements and contracts. Discussions are still underway on the overall number of places that are available to the LA/ agreed with providers bearing in mind sufficiency of provision and funding of any additional places.

Members are still concerned that schools may accept pupils from highest bidder, even if this is a neighbouring borough. The SEN team acknowledge this concern but are working to ensure that the new arrangements do not mean a reduction in the provision available for Barnet children.

6.2 Schools Forum Terms of Reference

Item deferred until next meeting, due to absence of Mark Callaghan

7. Items of Information

7.1 Procurement

Item deferred until next meeting due to staff sickness.

8 ANY OTHER BUSINESS

The next meeting will require re-election of Chair & Vice – Chair.

Meeting closed 5.20pm.

Dates for future meetings

11 October 2012	4.00pm (please note amended date)
15 November 2012	4.00pm
4 December 2012	4.00pm

6. MATTERS ARISING

Item 6.1 Update on actions from previous meeting

No actions outstanding from previous meeting.

7. SCHOOLS FORUM TERMS OF REFERENCE

Author	Carol Beckman
Position	School Funding Manager

Following consultation by the DfE, revised Schools Forum Regulations come into force from 1 October 2012 and revoke the Schools Forums (England) Regulations 2010. The changes to the regulations were highlighted in the document circulated to Forum members in June 2012.

The key changes to the Schools Forum Regulations comprise of:

- The requirement that forum meetings should be held in public, and that papers and minutes should be published promptly on local authority websites.
- It was felt that some forum meetings were too dominated by local authority representatives, therefore local authority participation in forum will be restricted to the Director of Children's Services, Chief Finance Officer or their representatives, and to the elected members with responsibility for Children's Services, Education or Resources.
- Non-schools members, other than those who represent early years providers, must not vote on matters relating to the formulae to be used by the local authority to determine the amounts to be allocated to schools and early years providers.
- The right to speak of any person presenting a paper, or other item, to the forum that is on the meeting's agenda, shall be limited to matters related to the item that the person is presenting.
- The requirement to have a minimum 15 members on the forum has been removed.
- The EFA now has observer status on the Schools Forum. The purpose of this is to support local decision-making through providing a national perspective, particularly where forum members consider this helpful or if there were concerns about the running of the forum.

Following is the amended Terms of Reference for Barnet's Schools Forum in accordance with The Schools Forum (England) Regulations 2012. The 2012 regulations can be accessed at:

<http://www.education.gov.uk/schools/adminandfinance/financialmanagement/schoolsrevenuefunding/schoolsforums/a00213728/schools-forums-england-regs-2012>

**BARNET SCHOOLS FORUM
TERMS OF REFERENCE**

1. The Purpose of the Schools Forum

1.1 The functions of the Forum are:

- i. to be consulted on the local authority's school funding formula.
- ii. to be consulted on service contracts at least one month prior to the local authority issuing invitations to tender.
- iii. to be consulted on specified issues in connection with the Schools Budget:
 - (a) the arrangements for the education of pupils with SEN;
 - (b) Pupil Referral Units (PRUs) and the education of children otherwise than at school;
 - (c) early years education;
 - (d) arrangements for the allocation of government grants;
- iv. with regard to Central Expenditure, to agree any spend which will breach the central limit.
- v. to agree application to the Secretary of State for disapplication of the MFG in exceptional circumstances, i.e. considered if there is a significant change in the school's circumstances or pupil numbers.
- vi. to agree changes to the local authority's Scheme for Financing Schools.

2. Membership

2.1 The membership will be reflective of the school community, local authority and other stakeholders. This must include representatives of pupil referral units, where there are any such schools in the authority's area. Wherever possible no school should be represented more than once.

2.2 Nominations for headteacher representatives will be obtained as follows:

Sector	Nominated by
Nursery	Nursery Headteachers
Primary	Primary Headteachers
Secondary	Secondary Headteachers
Special	Special Headteachers
Academies and Free Schools	Academy Principals
Pupil Referral Units (PRUs)	PRU Headteachers

2.3 Governor representatives will be self-nominating. An election among Chairs of the relevant school type will be conducted if there are more nominations than vacancies.

2.4 Elected members who hold an executive role in a local authority (a lead member) are barred from being either a schools member or a non-school member. However they have the right to attend meetings and speak but not vote.

2.5 The Director of Children's Service and other senior officers with a specific role in strategic financial management and/or the schools funding formula are barred from membership but they have the right to attend and speak at meetings.

2.6 The following persons may speak at meetings of the forum, even though they are not members of the forum:

- a) the Director of Children's services at the authority or their representative;
- b) the Chief Finance Officer at the authority or their representative;
- c) any elected member of the authority who has primary responsibility for Children's Services or education in the authority;
- d) any elected member of the authority who has primary responsibility for the resources of the

authority;

- e) any person who is invited by the forum to attend in order to provide financial or technical advice to the forum – Barnet’s forum engages an independent consultant for this purpose;
- f) an observer appointed by the Secretary of State; and
- g) any person presenting a paper or other item to the forum that is on the meeting’s agenda, but that person’s right to speak shall be limited to matters related to the item that the person is presenting.

2.7 The composition of the Schools Forum will be reviewed annually to ensure that the representation matches changes in pupil and school numbers and school type. Membership will not be restructured to reflect in-year changes such as conversion to academy status of members’ schools.

3 Roles and Responsibilities

3.1 Members should:

- i. take a strategic view of the issues they are considering and not be unduly influenced by personal views or circumstances
- ii. scrutinise and challenge decisions or proposals by the local authority to ensure that changes are made in an appropriate and transparent manner
- iii. ensure information is cascaded back to schools and relevant organisations which they represent, including signposting to online and other resources
- iv. keep up to date with decisions and information covered at meetings they could not attend by accessing minutes of the meeting and consulting with colleagues in attendance
- v. seek to acquire the necessary level of knowledge of school funding by reading background information with support from the local authority.

3.2 The Local Authority should:

- i. foster a positive working relationship with Forum members to feel comfortable to express opinions, ideas and concerns
- ii. provide open and honest advice to enable members to reach necessary decisions and informed views
- iii. provide all necessary resources and training to enable members to acquire the required level of knowledge to make informed and balanced decisions
- iv. be responsive to reasonable requests from the Forum (e.g. to discuss particular topics or provide specific information or data) which fall within the Schools Forum remit
- v. ensure that the Schools Forum operates within the local and national constitutional and procedural regulations.

3.3 The independent consultant to the Schools Forum should:

- i. provide impartial technical guidance as required during discussions at meetings.
- ii. work alongside the local authority in the development of training materials and delivery of training sessions.

4 Membership Structure

4.1 The membership structure for September 2012 is:

Type of Member	Schools (Sept 12)	Estimated Pupils (headcount) (Sep 12)	Total	Head Teachers	Governors
Maintained Primary Schools					
Community	48	17616	7	4	3
Foundation & VA	37	10640	5	3	2
Maintained Nursery Schools	4	497	1	1	0
Maintained Secondary Schools	7	5614	3	2	1
Pupil Referral Units	3	89	1	1	0
Maintained Special Schools	4	414	2	1	1
Academies & Free Schools			7		
Primary Academies	2	301			
Secondary Academies	15	16658			
Free/Studio Schools & UTCs	2	40			
Total School Members			26		
Non Schools Members					
Union			1		
Stakeholders					
Private Early Years Providers (PVI)			1		
14-19 Partnership			1		
Total Non Schools Members			3		
Total	122	51869	29		

5 Terms of Office

- 5.1 School and non-school members may serve for a period of three years. Subsequent re-election of existing members will be allowed. A member from the same representative group will replace members leaving early.
- 5.2 Members who miss two or more consecutive meetings will be asked if they want to continue to remain as members.
- 5.3 Where a member leaves the organisation they are representing they will cease to be a member.
- 5.4 If a school changes its status (e.g. becomes an Academy) the term of office of any member representing schools of the original status will come to an end at the end of the academic year.
- 5.5 The Secretary of State has powers to remove from the Forum any non-school member representing an organisation which she/he has determined, should not hold membership of the Forum.

6 Timing and frequency of meetings

- 6.2 The local authority will timetable at least five meetings per year. These meetings will be arranged to coincide with the Schools' Budget setting cycle, in order that the Schools Forum can be consulted in good time for its view to be taken into account before final decisions are taken for the following year.
- 6.3 The Schools Forum can determine to hold additional meetings if considered necessary in liaison with, and organised by, the local authority. In the event of such exceptional meetings, all members and non-voting attendees of the Forum must be given the opportunity to participate in the meeting for it to be deemed constitutional.
- 6.4 Meetings will be held during normal business hours (i.e. 9am-6pm) on weekdays during school term times. Meetings will normally commence at 4pm and to run until 6pm. The consultant will attend to provide brief impartial technical guidance as required during discussion of each agenda item.

7 Proceedings

- 7.1 The Forum will elect its own Chair and Vice-Chair from among its members at inception and then annually at the first meeting of each academic year.
- 7.1 The local authority will appoint a clerk.
- 7.2 For meetings to be quorate, at least 40% of current Forum members (excluding vacancies) must be present.
- 7.3 The quorum can include substitutes. Each member can have one nominated substitute. Substitutes must be nominated and recorded at the beginning of each member's term of tenure. The substitute may attend with the member but not vote. Substitutes will be expected to keep abreast of all issues in the same way as a full member.
- 7.4 Working parties may be set up as required but decision making remains with the full Schools Forum.
- 7.5 Forum meetings will be open to the public and unless specifically agreed all reports, minutes and agendas will be made available to the public online at:
http://www.barnet.gov.uk/WorkingWithChildrenInBarnet/info/30020/schools_forum
The agenda and papers not included under Part II will be made available publicly at the same time as they are issued to members. Minutes will be released once agreed and signed as a true record.
- 7.6 Where a member of the Forum has a personal or pecuniary interest (either as a headteacher, governor, parent or individual) in a matter to be discussed at a meeting of the Forum or a sub-committee, they must declare an interest at the start of the meeting or as soon as it becomes apparent. Following a declaration of interest, the Forum shall determine whether the member should withdraw from the meeting for that item or remain and not be counted in the quorum for the item.
- 7.7 Minutes will be circulated to members within 10 working days of each meeting.

8 Voting and Decision Making

- 8.1 The Chair and Vice-Chair will be elected by a simple majority vote, cast by individual voting members present in each case. In the event of a tie, a revote will be held of the tying candidates. If there is still a tie the Director of Children's Services (or his/her representative) will have the casting vote.
- 8.2 General procedural matters (e.g. length of meetings, additional meetings, project work etc.) will also be decided by majority vote.
- 8.3 Only school, academy and PVI members are able to vote on the funding formulae to be used by the local authority to determine the amounts to be allocated to schools and early years providers.
- 8.4 Only the relevant maintained school members of the Forum are able to vote on de-delegation of funds (i.e. primary members vote on primary dedelegation, secondaries on secondary dedelegation). The relevant services about which the Schools Forum can make decisions on behalf of maintained schools in a phase are as follows:

- a. allocation of contingencies;
- b. administration of free school meals eligibility;
- c. insurance;
- d. licenses or subscriptions;
- e. staff costs or supply cover;
- f. support for minority ethnic pupils or underachieving pupils;
- g. behaviour support services; and
- h. library and museum services.

8.5 Any member, other than those restricted by items 7.3 and 7.4 may put forward a proposal for the Forum to consider on matters connected with:

- changes to the funding formula; or
- special issues relating to the Schools' budget; or
- service contracts

8.6 All proposals (whether for decision or for consultation) will be decided by majority vote, recording the number of individual members voting (i) in favour; or (ii) against; or (iii) abstaining.

8.7 Each member's vote must have an equal weighting, save that in the event of a tie in the number of votes the members may determine such other voting procedures as they see fit. In the absence of alternative voting procedures, the Chair will make the casting vote.

9 Distribution and Content of Papers

9.1 The draft agenda for the next meeting will be presented for approval at each meeting. A finalised agenda will be circulated to all members 10 days before each meeting.

9.2 The local authority will, in normal circumstances, distribute papers 10 working days (excluding weekends, school and public holidays) in advance of each meeting. Where the fluidity of information means that the content of papers is subject to rapid change, amendments to papers may be issued closer to the meeting. Tabled papers will be avoided if possible.

9.3 Papers will be presented in a logical order with a clear demarcation of issues for action and consultation to assist with the decision making process and focus discussion.

9.4 Papers will cover key issues with sufficient detail in plain English to allow members to make informed strategic decisions.

9.5 Where members do not understand the content of papers, it is their responsibility to contact the local authority or fellow members to request further clarity or support.

10. Training

10.1 Induction and training will be provided by the local authority for new members.

10.2 The local authority will organise annual training to bring all members up to the required level of knowledge to enable them to participate fully in all discussions and decisions.

10.3 Training should provide clarity around relevant issues and ensure that members are able to understand the consequences of financial decisions on other aspects of the budget. The local authority will work in conjunction with the Schools Forum consultant to achieve this.

11. Expenses

11.1 All costs associated with the running of the schools budget will be met by the centrally retained element of the schools budget.

- 11.2 Reasonable expenses of members in connection with attendance at meetings of the Forum shall be reimbursed.
- 11.3 Based on the process agreed by the Forum, supply cover will be available to teacher governors, but not headteachers.

12 Confidentiality

- 12.1 Should information of a confidential or privileged nature (e.g. in matters relating to proposed contracts) be given to Forum members for an item under discussion, they must observe the confidentiality of such matters. During the discussion, any members of the public may, at the discretion of the Chairman, be asked to withdraw from the meeting.

13 Amendments to the Terms of Reference

- 13.1 The terms of reference may be amended through a majority of members at a quorate meeting of the Schools Forum.

Bibliography

The Schools Forums (England) Regulations 2010, Department for Children, Schools and Families, February 2010

The Schools Forums (England) Regulations 2012, Department for Education

Schools Forums: Operational And Good Practice Guidance, Department for Education, December 2010

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<http://media.education.gov.uk/assets/files/xls/s/schools%20forum%20responsibilities.xls>

School funding reform: Arrangements for 2013-14/ Department for Education/ Crown copyright 2012

School funding reform: Next steps towards a fairer system/ Department for Education/2012

School funding reform: Arrangements for 2013-14/DfE/ Crown copyright 2012/

www.education.gov.uk/schools/adminandfinance/financialmanagement/schoolsrevenuefunding/a00205567

Action

The Schools Forum is asked to approve the amended Terms of Reference in accordance with The Schools Forum (England) Regulations 2012 to come into immediate effect.

8. SCHOOLS BUDGET 2012/13

Item 8.1 Revised Schools Budget 2012/13

Author	Anisa Darr/Carol Beckman
Position	Head of Finance (Children's and Adults)

2012/13 Schools budget

This report sets out revisions to the schools budget for 2012/13. There are three revisions required to reflect the following:

- 1) The reduction of DSG income due to the change in pupil numbers confirmed by DfE as reported at the last Schools Forum. The pupils numbers confirmed by the DfE were 87 less than were assumed in the budget presented in July. This equates to a reduction in assumed DSG income of £496k.
- 2) The 2011/12 underspend is now reflected in the budget in accordance with the School Forum's decision in July. The additional resources have been made in the following lines of the budget:
 - £500k deployed to negate the impact of the reduction in assumed DSG funding due to pupil numbers (line 1.0.1 and 1.3.1)
 - £240k held in contingency for pupil places and £250k for schools transformation (line 1.1.2)
 - Additions to capital include £440k for Oakleigh School and £679k for inclusion in the Children's capital programme to deliver urgent pupil places (line 1.8.1)
- 3) The conversion of Copthall and Grasvenor to academy status from the 01/09/2012 has resulted in recoupment of income £4.6m and a corresponding net reduction in expenditure of £4.6m:
 - Reduction in ISB of £4.7m (line 1.0.1)
 - Reduction in contingencies of £49k relating to LACSEG and school organization (line 1.1.2)
 - Increase in provision for pupils with SEN £160k (line 1.2.1)

The impact of these changes are detailed in the 2012/13 budget table.

Recommendation:

To note the revisions to the budget for 2012/13

Previous reports to the Forum:

- 1 February 2012 and 1 May 2012 agreed the draft budget for 2012/13.
- 12 July 2012 agreed the 2012/13 budget.

Schools Forum Schools Budget 2012/13

SCHOOLS BUDGET INCOME	Schools Forum 12th July 2012	Adjustments	Schools Forum 11th Oct 2012	Comments
Pupils	45,778	(87)	45,691	Revised pupil numbers
GUF Per Pupil £5,641.85				
DSG	258,277,856	(495,856)	257,782,000	DSG allocation amended as a result of change in pupil numbers
Recoupment - from ISB	(59,117,481)	(3,895,429)	(63,012,910)	Change relates to Copthall and Grasvenor academy conversion
Recoupment - LACSEG	(144,162)	(8,095)	(152,257)	Change relates to Copthall and Grasvenor academy conversion
Recoupment (Budget Shares & LACSEG)	(59,261,643)	(3,903,524)	(63,165,167)	
EFA (YPLA) - 6th forms	7,361,738	(42,656)	7,319,082	Revised allocations to 6th forms
EFA (YPLA) SEN	2,786,704	(4)	2,786,700	
EFA (YPLA) Teachers Pay Grant	381,453	0	381,453	
Bursaries	5,054	0	5,054	
EFA (YPLA) reduction for Academies (in year)		(670,908)	(670,908)	Change relates to Copthall and Grasvenor academy conversion
Total EFA (YPLA)	10,534,949	(713,568)	9,821,381	
Underspend	2,108,953	0	2,108,953	
Pupil Premium allocated to Schools	5,480,500	0	5,480,500	
Pupil Premium managed Centrally	64,481	0	64,481	
Pupil Premium	5,544,981	0	5,544,981	
Total Income	217,205,096	(5,112,948)	212,092,148	

SCHOOLS BUDGET EXPENDITURE		Schools Forum 12th July 2012	Adjustments	Schools Forum 11th Oct 2012	
1.0.1	Individual Schools Budget (excluding academy statements)	244,600,699	(159,724)	244,440,975	Net effect of addition of monies from 2011/12 u/s to mitigate impact of reduction in pupil numbers & change due to academy conversions
	LESS Post 16 reduction for academy conversions	(1,169,862)	(670,908)	(1,840,770)	Change relates to Copthall and Grasvenor academy conversion
	LESS Academies Recoupment	(59,120,276)	(3,892,634)	(63,012,910)	Change relates to Copthall and Grasvenor academy conversion
1.0.1	ISB Net (ie Maintained schools and delegated to Academies)	184,310,561	(4,723,266)	179,587,295	
1.0.2	Pupil Premium allocated to Schools	5,480,500	0	5,480,500	
1.0.3	Pupil Premium managed Centrally	64,481	0	64,481	
1.0.4	Threshold and Performance Pay (Devolved)	0	0	0	
1.0.10	Central expenditure on education of children under 5	0	0	0	
	Distributed to maintained schools and settings	189,855,542	(4,723,266)	185,132,276	
Centrally Retained Schools Budget					
1.0.5	Central expenditure on education of children under 5	840,030	0	840,030	
1.1.2	School specific contingencies				
	Statements	400,000	0	400,000	
	Special & Resourced Schools	250,000	0	250,000	
	SEN Contingency	123,000	0	123,000	

SCHOOLS BUDGET EXPENDITURE		Schools Forum 12th July 2012	Adjustments	Schools Forum 11th Oct 2012	
	School Organisation	341,533	448,689	790,222	Increase of £490k relates to 2011/12 u/s being held for schools re-organisation and pupil places. Reduction of £41k because of academy conversions.
	LACSEG Unknown in year converters	117,488	(8,095)	109,393	Change relates to Copthall and Grasvenor academy conversion
	Pupil Premium	0	0	0	
	Unallocated underspend	2,108,953	(2,108,953)	0	Change relates to 2011/12 u/s being allocated as per July Schools Forum decisions
1.1.2	Contingencies	3,340,974	(1,668,359)	1,672,615	
1.1.3	Early Years contingency	200,000		200,000	
1.1.2- 1.1.3	Total School Contingencies	3,540,974	(1,668,359)	1,872,615	
1.2.1	Provision for pupils with SEN (including assigned resources)	6,222,571	159,724	6,382,295	Change relates to Copthall and Grasvenor academy conversion
1.2.2	SEN support services	494,035	0	494,035	
1.2.3	Support for inclusion	489,700	0	489,700	
1.2.4	Fees for pupils with SEN at independent special schools & abroad	7,756,458	0	7,756,458	
1.2.5	SEN transport	400,000	0	400,000	
1.2.6	Fees to independent schools for pupils without SEN	76,575	0	76,575	
1.2.7	Interauthority recoupment	2,304,860	0	2,304,860	
1.2.8	Contribution to combined budgets	907,460	0	907,460	
1.3.1	Pupil Referral Units	1,815,335	0	1,815,335	Addition of monied from 2011/12 u/s to mitigate impact of reduction in pupil numbers
1.3.2	Behaviour Support Services	207,730	0	207,730	
1.3.3	Education out of school	537,971	0	537,971	
1.3.4	14-16 More practical learning options	64,000	0	64,000	

SCHOOLS BUDGET EXPENDITURE		Schools Forum 12th July 2012	Adjustments	Schools Forum 11th Oct 2012	
1.4.1	Support to underperforming ethnic minority groups and bilingual learners	216,580	0	216,580	
1.5.1	School meals - nursery, primary and special schools	0	0	0	
1.5.2	Free school meals eligibility	3,568	0	3,568	
1.5.3	Milk	0	0	0	
1.5.4	School kitchens repair and maintenance	0	0	0	
1.6.1	Insurance	415,226	0	415,226	
1.6.2	Museum and Library Services	24,753	0	24,753	
1.6.3	School admissions	364,192	0	364,192	
1.6.4	Licences/subscriptions	0	0	0	
1.6.5	Miscellaneous (not more than 0.1% total of net SB)	195,580	0	195,580	
1.6.6	Servicing of schools forums	34,680	0	34,680	
1.6.7	Staff costs supply cover (not sickness)	145,620	0	145,620	
1.6.8	Supply cover long term sickness	0	0	0	
1.6.9	Termination of employment costs	0	0	0	
1.6.10	Purchase of carbon reduction commitment allowances	291,656	0	291,656	
1.7.1	Other Specific Grants	0	0	0	
1.8.1	Capital Expenditure from Revenue (CERA) (Schools)	0	1,118,953	1,118,953	£440k for Oakleigh (agreed 1/2/12), £679k u/s for pupil places pressures
1.8.2	Prudential borrowing costs	0	0	0	
1.2.1 - 1.8.2	Subtotal other Centrally Retained	22,968,550	1,278,677	24,247,227	
	Total Centrally retained Schools Budget	27,349,554	(389,682)	26,959,872	
	TOTAL EXPENDITURE	217,205,096	(5,112,948)	212,092,148	
		0	0	0	
	Balance				

Item 8.2 Schools Budget Monitoring 2012/13 (30 June 2012)

Author	Anisa Darr/Carol Beckman
Position	Head of Finance (Children's and Adults)

Introduction

This report provides monitoring information on the schools budget for the position at the end of quarter one for 2012/13. This information will also be reported to the Council's Cabinet Resources Committee on 18 October 2012. Details of the end of quarter position are set out in the table below.

2012/13 Schools budget monitoring

The quarter one monitor reports on projected expenditure against the budget presented to the Schools Forum on 12 July 2012. At the end of the first quarter, the budget is showing a balanced position. This is a net position of the following over and underspends:

- Children in care budgets are overspending by £11k due to panel decisions (line 1.2.3)
- P&I day, special and residential schools were showing a net overspend of £89k. (line 1.2.4)
- At month 3 the projection of recoupment income shows an anticipation of more monies than was budgeted for (line 1.2.7)

In areas of overspend, budget holders are working to manage their service and draw up recovery plans where necessary in order to come in on budget.

Risks and pressures:

There are a number of continuing risks to the budget that will be kept under review. The most significant is the rise in overall pupil numbers and a consequent rise in the number of vulnerable pupils and pupils with special educational need.

Recommendation:

To note the budget monitoring position at quarter 1 for 2012/13.

Previous reports to the Forum:

- 1st February 2012 and 1st May 2012 agreed the draft budget for 2012/13.
- 12th July 2012 agreed the 2012/13 budget.

Schools Forum Schools Budget 2012/13

Schools Forum
12th July 2012

SCHOOLS BUDGET INCOME	Budget 2012/13	Forecast Q1 2012/13	Variance 2012/13	Comments
Pupils	45,778			
GUF Per Pupil £5,641.85				
DSG	258,277,856	258,277,856	0	
Recoupment - from ISB	(59,117,481)	(59,117,481)	0	
Recoupment - LACSEG	(144,162)	(144,162)	0	
Recoupment (Budget Shares & LACSEG)	(59,261,643)	(59,261,643)	0	
EFA (YPLA) - 6th forms	7,361,738	7,361,738	0	
EFA (YPLA) SEN	2,786,704	2,786,704	0	
EFA (YPLA) Teachers Pay Grant	381,453	381,453	0	
Bursaries	5,054	5,054	0	
EFA (YPLA) reduction for Academies (in year)				
Total EFA (YPLA)	10,534,949	10,534,949	0	
Underspend	2,108,953	2,108,953	0	
Pupil Premium allocated to Schools	5,480,500	5,480,500	0	
Pupil Premium managed Centrally	64,481	64,481	0	
Pupil Premium	5,544,981	5,544,981	0	
Total Income	217,205,096	217,205,096	0	

SCHOOLS BUDGET EXPENDITURE		Budget 2012/13	Forecast Q1 2012/13	Variance 2012/13	Comments
1.0.1	Individual Schools Budget (excluding academy statements)	244,600,699	244,600,699	0	
	LESS Post 16 reduction for academy conversions	(1,169,862)	(1,169,862)	0	
	LESS Academies Recoupment	(59,120,276)	(59,120,276)	0	
1.0.1	ISB Net (ie Maintained schools and delegated to Academies)	184,310,561	184,310,561	0	
1.0.2	Pupil Premium allocated to Schools	5,480,500	5,480,500	0	
1.0.3	Pupil Premium managed Centrally	64,481	64,481	0	
1.0.4	Threshold and Performance Pay (Devolved)	0	0	0	
1.0.10	Central expenditure on education of children under 5	0	0	0	
	Distributed to maintained schools and settings	189,855,542	189,855,542	0	
	Centrally Retained Schools Budget				
1.0.5	Central expenditure on education of children under 5	840,030	840,030	0	
1.1.2	School specific contingencies				
	Statements	400,000	400,000	0	
	Special & Resourced Schools	250,000	250,000	0	
	SEN Contingency	123,000	123,000	0	
	School Organisation	341,533	341,533	0	
	LACSEG Unknown in year converters	117,488	117,488	0	
	Pupil Premium	0	0	0	
	Unallocated underspend	2,108,953	2,108,953	0	
1.1.2	Contingencies	3,340,974	3,340,974	0	
1.1.3	Early Years contingency	200,000	200,000	0	
1.1.2-1.1.3	Total School Contingencies	3,540,974	3,540,974	0	

SCHOOLS BUDGET EXPENDITURE		Budget 2012/13	Forecast Q1 2012/13	Variance 2012/13	Comments
1.2.1	Provision for pupils with SEN (including assigned resources)	6,222,571	6,222,571	0	
1.2.1	Provision for pupils with SEN (including assigned resources)	6,222,571	6,222,571	0	
1.2.2	SEN support services	494,035	494,035	0	
1.2.3	Support for inclusion	489,700	500,700	11,000	Projected overspend as a result of panel decisions. This is being managed & recovery plan is in place
1.2.4	Fees for pupils with SEN at independent special schools & abroad	7,756,458	7,845,458	89,000	Net position of over and underspends in P&I day, special and residential school
1.2.5	SEN transport	400,000	400,000	0	
1.2.6	Fees to independent schools for pupils without SEN	76,575	76,575	0	
1.2.7	Interauthority recoupment	2,304,860	2,204,860	(100,000)	Current projection of recoupment income is higher than budgeted for
1.2.8	Contribution to combined budgets	907,460	907,460	0	
1.3.1	Pupil Referral Units	1,815,335	1,815,335	0	
1.3.2	Behaviour Support Services	207,730	207,730	0	
1.3.3	Education out of school	537,971	537,971	0	
1.3.4	14-16 More practical learning options	64,000	64,000	0	
1.4.1	Support to underperforming ethnic minority groups and bilingual learners	216,580	216,580	0	
1.5.1	School meals - nursery, primary and special schools	0	0	0	
1.5.2	Free school meals eligibility	3,568	3,568	0	
1.5.3	Milk	0	0	0	
1.5.4	School kitchens repair and maintenance	0	0	0	
1.6.1	Insurance	415,226	415,226	0	
1.6.2	Museum and Library Services	24,753	24,753	0	
1.6.3	School admissions	364,192	364,192	0	
1.6.4	Licences/subscriptions	0	0	0	
1.6.5	Miscellaneous (not more than 0.1% total of net SB)		195,580	0	
		195,580			

SCHOOLS BUDGET EXPENDITURE				
1.6.6	Servicing of schools forums	34,680	34,680	0
1.6.7	Staff costs supply cover (not sickness)	145,620	145,620	0
1.6.8	Supply cover long term sickness	0	0	0
1.6.9	Termination of employment costs	0	0	0
1.6.10	Purchase of carbon reduction commitment allowances	291,656	291,656	0
1.7.1	Other Specific Grants	0	0	0
1.8.1	Capital Expenditure from Revenue (CERA) (Schools)	0	0	0
1.8.2	Prudential borrowing costs	0	0	0
1.2.1 - 1.8.2	Subtotal other Centrally Retained	22,968,550	22,968,550	0
	Total Centrally retained Schools Budget	27,349,554	27,349,554	0
	TOTAL EXPENDITURE	217,205,096	217,205,096	0
	Balance	0	0	0

9. SCHOOLS BLOCK

Item 9.1 Funding Formula 2013/14

Author	Carol Beckman
Position	School Funding Manager

2013/14 Formula funding consultation

This paper explains the consultation process and methodology for devising a new school funding formula for mainstream schools and academies in Barnet from April 2013. It sets out an indicative funding formula and proposed rates for Barnet's submission to the Education Funding Agency, required by the end of October.

Consultations

1. The DfE released their School Funding reform consultation in March 2012, to which the authority responded. The Schools Forum was invited to send their own response to the consultation, and was also informed of Barnet's response prior to the consultation closing in May.
2. Barnet held an initial conference with schools in May which was well attended
3. This was followed by an online consultation at the end of the summer term 2012 which asked schools to give their views on the principles of the new funding formula. There was a poor response rate to this.
4. A further briefing and consultation was held on 24th September which was attended by 27 schools.

Online Survey Responses

We received 27 responses, but many respondents skipped several or all questions so overall the statistical quality was poor. Not everyone identified who they were, but of the 18 who did there was 1 nursery, 11 primary, 3 secondary, 1 academy and 2 other.

In summary the results were:

- 1). Formula: of the 13 out of 17 (76%) who gave a view said that we should aim for a formula which most closely fits the current formula, rather than try to predict a future national funding formula.
- 2) Lump sum: 11 out of 15 (73%) felt there should be a lumpsum, but there was no clear preference about the size of a lump-sum.
- 3). Deprivation: 10 out of 16 who gave a view (63%) felt that a combination of free school meals and IDACI would most accurately measure deprivation in schools.
- 4). Free School Meals: 13 out of 17 (76%) preferred us to use the 'FSM6' measure to plain FSM – FSM6 counts the number of children on roll who have ever been eligible for free school meals in the last 6 years.
- 5). IDACI: We asked what band levels of deprivation (IDACI ranges) should be most highly funded. The consensus was unclear and we suspect that the question was not framed well clearly enough to provide an answer.
- 6). Prior Attainment: 11 out of 18 (61%) felt that prior attainment should be used as a funding factor for primary schools. 9 out of 15 (60%) felt it should be used in secondary schools
- 7). English as an Additional Language: 16 out of 18 (88%) want EAL to be used as a funding factor.
- 8). Factor ranking: We asked respondents rank the importance of the 6 main funding factors. Overall the results were (most important first):
 - I. AWPU (per pupil funding)
 - II. Free School Meals
 - III. IDACI
 - IV. EAL
 - V. Lump sum

VI. Prior attainment

Since the initial Barnet consultation with schools, the DfE has announced that Mobility is now an admissible factor, and as this impacted a number of schools in Barnet we have included this in our modelling proposals to the same level as was distributed in 12/13.

Modelling for 2013/14

Modelling has used the following principles:

1. To match most closely to schools' 2012/13 allocations
2. The total distribution by sector remains consistent with actual 2012/13 allocations, i.e. £112m to primaries/ primary academies and £88m to secondary schools/ academies (total £200m). The total available to distribute in 2013/14 may be different.
3. The quantum distributed through each of the new formula factors is in line 2012/13 factors of the same type (premises factors were put through the AWPU)
4. Deprivation funding is allocated equally between FSM6 and IDACI to the same overall amount as 12/13 as we found this reflected 2012/13 more accurately.
5. The relative importance of factors reflects the results of the online consultation, but with the addition of a mobility factor, as this is now permitted by the DfE.
6. We sought to protect the lowest funded schools from further reduction
7. Prior attainment was not used as the amount of money to distribute was very small and the additional factor did not improve the formula.
8. Our aim is to both minimise the number of schools on the minimum funding guarantee and minimise the overall cost of the MFG.

The table below shows the headline principles used in the proposed new Barnet funding formula model and which have been used for the provisional rates that we are asking Schools Forum to ratify prior to submission of the first pro-forma required by the EFA at the end of October.

Factor	Comments
AWPU	79% distributed through the AWPU, consistent with 2012/13 level.
FSM6	Deprivation provided 15% of overall primary funding and 10% of overall secondary funding in 2012/13. The proposed 2013/14 rates give equal weighting between FSM6 and IDACI.
IDACI	
Low Attainment	Not used
EAL	The total EAL funding is equal to the amount distributed in 2012/13
Mobility	The total distributed remains at 2012/13 levels, but is more widely spread across all schools and academies because there is no longer a threshold to trigger funding.
Lump Sum	The level proposed is a balance between the current Primary lump sum of £102,000 and the Secondary figure of £182,000.
Split Sites	Funded on the same basis as 2012/13
Rates	Funded on an actual cost basis
MFG cap	To ensure stability for both gainers and losers under the new proposals, a cap has been applied at 2.5%, and the MFG protects schools against losses of more than 1.5% per pupil. Without a cap, the cost of the MFG would be in excess of £4m, and the rates offered for each of the new formula factors would need to be scaled back for all schools.
Minimum Funding Guarantee	The 2.5% cap proposed reduces the overall cost of the MFG to £700,000.

Primary:
Secondary ratio

At the September consultation secondary schools felt a ratio of 1:1.23 between Primary and Secondary funding was too low. The 2012/13 ratio is 1:1.27.

Provisional formula

It is important to note that the table below is an indication of the relative level of funding formula rates likely to be used for 2013/14 and should **not** be used to estimate an individual school's funding at this stage.

Factor	Provisional proposals for 13/14 rates	
	Primary	Secondary
AWPU	£3,300	£4,750
FSM6	£1,374 per pupil	£1,359 per pupil
IDACI score 0.4 – 0.5	£215 per pupil	£247 per pupil
IDACI score 0.5 – 0.6	£717 per pupil	£819 per pupil
IDACI score 0.6 - 1	£4,205 per pupil	£2,917 per pupil
Low Attainment	Not used	
EAL	£530 per pupil	£1,378 per pupil
Primary Mobility	£98 per pupil	£147 per pupil
Lump Sum	£125,000	
Split Sites	As 12/13	
Rates	Actual cost	
MFG cap	Proposed 2.5% per pupil cap on gains	

The table below shows the likely impact on individual schools if these indicative rates were applied. Please note that October 2011 data as prepared for us by the DfE has been used. Actual funding will be based on October 2012 data. The percentage gain or loss is shown, together with an indication of whether the school is :

- above the new formula and thus incurs a cap on gains
- on the new formula without adjustment
- protected by the Minimum Funding Guarantee

Schools Forum members must bear in mind that one of the many challenges in this initial modelling is that we do not yet know either the overall Dedicated Schools Grant (DSG) allocation that Barnet is due to receive until the census has taken place on 4th October then cleaned and returned to us in December 2012 , nor the amount available for distribution to schools within the DSG. Our modelling also excludes high needs, the nursery free entitlement and 6th forms as well as the pupil premium.

Primary	Cap, Formula or MFG	Percentage gain/ loss per pupil
3022077 The Orion Primary School	Capped	2.5%
3023511 Blessed Dominic School	Capped	2.5%
3023523 Martin Primary School	Capped	2.5%
3023514 Annunciation Junior School	Capped	2.5%
3023502 St Agnes RC Primary School	Capped	2.5%
3023518 Woodcroft Primary School	Capped	2.5%
3022029 Goldbeaters Primary School	Capped	2.5%
3023304 Holy Trinity School	Capped	2.5%
3023521 St Mary's & St John's CE Primary	Capped	2.5%
3023501 Our Lady of Lourdes School	Capped	2.5%
3023313 St Paul's School, N11	Capped	2.5%
3022021 Dollis Infant School	Capped	2.5%
3022014 Colindale School	Capped	2.5%

3022018 Deansbrook Junior School	Capped	2.5%
3023300 All Saints Primary School	Capped	2.5%
3022073 Danegrove JMI School	Capped	2.5%
3025200 Dollis Junior School	Capped	2.5%
3023314 St Pauls CE Primary School	Capped	2.5%
3022028 Garden Suburb Infant School	Capped	2.5%
3022000 Parkfield Primary School	Capped	2.5%
3025201 Osidge Primary School	Capped	2.5%
3023309 St Johns N20	Capped	2.5%
3022026 Frith Manor School	Capped	2.5%
3023305 Monken Hadley C E Primary School	Capped	2.5%
3022074 The Hyde School & Children's Centre	Capped	2.5%
3023509 St Joseph's Junior School	Capped	2.5%
3022042 Monkfrith School	Capped	2.5%
3023500 The Annunciation Catholic Infant School	Capped	2.5%
3023311 St Mary's C E Primary School N3 1BT	Capped	2.5%
3022027 Garden Suburb Junior	Formula	2.49%
3023312 St Mary's School EN4	Formula	2.34%
3023302 Christ Church CE Primary School	Formula	2.33%
3023512 Rosh Pinah	Formula	1.95%
3022054 Woodridge Primary School	Formula	1.59%
3022007 Brookland Junior School	Formula	1.54%
3022002 Barnfield School	Formula	1.41%
3022011 Church Hill Primary School	Formula	1.29%
3022044 Moss Hall InfantSchool	Formula	1.02%
3023520 Akiva School	Formula	0.92%
3023507 ST. THERESA'S R.C. PRIMARY SCHOOL	Formula	0.82%
3022016 Courtland School	Formula	0.67%
3023510 Sacred Heart School	Formula	0.57%
3022019 Deansbrook Infant School	Formula	0.42%
3023515 Independent Jewish Day School	Formula	0.35%
3025949 Menorah Foundation School	Formula	0.32%
3022079 Beis Yaakov	Formula	0.22%
3023504 St Catherines R C Primary	Formula	0.19%
3022025 Foulds	Formula	0.11%
3025948 Mathilda Marks-Kennedy School	Formula	0.02%
3022008 Brookland Infant & Nursery School	Formula	-0.29%
3023315 St Andrew's C E	Formula	-0.37%
3022072 Queenswell Junior School	Formula	-0.49%
3023506 St Vincent's Catholic Primary School	Formula	-0.66%
3022023 Edgware Infant and Nursery School	Formula	-0.67%
3022067 Chalgrove Primary School	Formula	-0.81%
3022022 Edgware Junior School	Formula	-1.33%
3023317 All Saints' CE Primary School, N20	MFG	-1.5%
3023513 Menorah Primary School	MFG	-1.5%
3023316 Trent C of E Primary School	MFG	-1.5%
3022032 Holly Park School	MFG	-1.5%
3022043 Moss Hall Junior School	MFG	-1.5%
3022017 Cromer Road Primary School	MFG	-1.5%
3022009 Brunswick Park Primary & Nursery	MFG	-1.5%

School		
3022078 Pardes House School	MFG	-1.5%
3023519 Broadfields Primary School	MFG	-1.5%
3023516 Hasmorean Primary School	MFG	-1.5%
3023508 St Joseph's Infant School	MFG	-1.5%
3023307 St John's CE School N11	MFG	-1.5%
3022056 Underhill Junior School	MFG	-1.5%
3022037 Manorside Primary School	MFG	-1.5%
3022024 Fairway Primary School	MFG	-1.5%
3022071 Queenswell Infant and Nursery School	MFG	-1.5%
3022057 Underhill Infant School and CC	MFG	-1.5%
3022055 Tudor School	MFG	-1.5%
3022070 Sunnyfields Primary	MFG	-1.5%
3022052 Summerside Primary School	MFG	-1.5%
3022076 Wessex Gardens Primary School	MFG	-1.5%
3023524 Edgware Jewish Primary School	MFG	-1.5%
3023522 Claremont Primary School	MFG	-1.5%
3022003 Bell Lane Primary School	MFG	-1.5%
3022010 Child Hill School	MFG	-1.5%
3022030 Grasvenor Avenue Infants	MFG	-1.5%
3022060 Whittings Hill Primary School	MFG	-1.5%
3022045 Northside School	MFG	-1.5%
3022031 Hollickwood JMI School	MFG	-1.5%
3022015 Coppetts Wood	MFG	-1.5%
3022036 Livingstone School	MFG	-1.5%

Secondary		
3025407 St. James' Catholic High School	Capped	2.5%
3024210 Copthall School	Capped	2.5%
3025401 Queen Elizabeth's School	Capped	2.5%
3024211 Christ's College Finchley	Capped	2.5%
3024003 Friern Barnet School	Capped	2.5%
3024752 The Henrietta Barnett School	Capped	2.5%
3025406 Ashmole Academy	Capped	2.5%
3025405 Finchley Catholic High School	Formula	2.08%
3024212 East Barnet School	Formula	0.79%
3024215 The Compton School	Formula	0.06%
3024208 Queen Elizabeth's Girls' School	Formula	-0.29%
3025402 Mill Hill High School	Formula	-0.30%
3025400 Hendon School	Formula	-0.30%
3025403 St. Mary's CE High School	Formula	-0.47%
3025404 St Michaels Catholic Grammar School	Formula	-0.49%
3025409 Hasmorean High School	Formula	-0.85%
3025408 Bishop Douglass School	MFG	-1.5%
3024009 The Totteridge Academy	MFG	-1.5%
3024012 Whitefield School	MFG	-1.5%
3025427 Jewish Community Secondary School	MFG	-1.5%

There will be a further opportunity to submit the pro-forma and revise the proposed factor rates in January 2013, once the overall DSG and Schools block allocation has been determined and October census school

level data has been received.

For decision:

To approve the indicative funding formula and rates for submission to the Education Funding Agency by the end of October.

Item 9.2 Additional delegation and de-delegation

Author	Carol Beckman
Position	School Funding Manager

Schools Block 2013/14: Additional delegation and de-delegation of funds

Background

Within the current school funding regime, local authorities retain part of the Dedicated Schools Grant (DSG) to fund central services to schools and children. These central budgets are set out within the overall budget agreed the Schools Forum. Each year the budget is submitted to central government on the 'Section 251' return. The DSG is ring-fenced for education and there are clear regulations about what expenditure can be assigned to the different lines of Section 251. Barnet uses the Section 251 format to report these areas of expenditure to the Forum.

From April 2013 the guidelines on centrally retained budgets are changing. The government wants schools to directly manage more of the expenditure for functions previously provided by the LA. These new rules do not apply to central expenditure on special educational needs (SEN) or early years, only lines for central expenditure on mainstream schools – the Schools Block.

This paper sets out the funds currently held by the LA and 'categorises' the spend within the proposed structure of the new Schools Block for April 2013, as well as the services the LA is requesting to continue to provide next year through de-delegation and asks the Schools Forum for a decision on these services.

Changes for 2013/14

The central expenditure lines of the new Schools Block from next year will fall into one of the following categories. (Details of the services currently funded within each category are set out in Table 1).

- A. Expenditure that must be delegated to schools and so will be distributed in addition to the school funding formula. For the LA to continue to provide this service, it must establish a traded service for schools to buy into.
- B. Expenditure that must be delegated to schools but which maintained schools can 'de-delegate' back to the local authority if they wish. For this to be achieved the primary and secondary members of the Schools Forum must vote separately on each item proposed for de-delegation. Academies cannot de-delegate and will receive the money in their budget share instead of the former schools block LACSEG (Local Authority Central Spend Equivalent Grant). This category in Barnet this year amounts to £595,894.
- C. Expenditure that can continue to be held centrally but cannot be increased, above its current level and can only be used for the purposes it was originally intended for and no new commitments are allowed. This category in Barnet this year amounts to £1,494,219.

As the new school funding formula does not allow a factor for pupil growth in schools, outside of these categories, a centrally retained growth fund can be set up with Schools Forum approval to meet the needs of expanding schools. The budget for this in 2012/13 is £2,212,051. Proposals for a growth fund in 2013/14 to enable the growth in pupil numbers to be funded in Barnet will be presented at the next Schools Forum.

Additional funds to be delegated in 2013/14

Barnet has long been a high delegator and so the amount of money to be newly delegated is relatively limited in comparison to some other authorities.

In Category A, the amount to be delegated is £64,000. This amount currently funds the service providing advice and assistance on 14-19 provision. The service will be re-shaped to accommodate this reduction.

In Category B, The amount currently spent is £595,894 which supports:

- Narrowing the gap
- Staff Cover

- Free School Meals Eligibility
- Insurance
- School Library Resource Service

For three services of these services (Free School meals, Insurance and School Library Resource Service), we are proposing that the monies are delegated and schools assume responsibility for providing or purchasing the service. The most significant element is insurance. From April 2013 schools will assume the responsibility for purchasing (from the council or other provider) public liability and Officials Indemnity Insurance.

In relation to the School Library Resource Service, the shortfall will be recouped through an increase in the price to purchase the traded service. This may affect the viability of the service should insufficient schools purchase the service.

De-delegation

The LA is requesting de-delegation for two services. Funding is in place for these services through to March 2013. However, an early decision is required as should these services no longer be centrally funded, the local authority will be required to cease the service and sufficient notice is required to implement a reduction in staffing etc.

a) Narrowing the gap

Improving educational outcomes for Barnet's vulnerable pupils and closing the gap between their achievement and that of their peers is a local priority for the schools partnership. While vulnerable groups in general do well in Barnet, the attainment of these pupils in schools and academies across Barnet requires constant vigilance.

The retention of a very small team with primary and secondary expertise allows:

- The oversight and analysis of data across the broad range of schools, identifying trends, patterns, areas of concern and areas of success across the whole school partnership
- Advocacy for the maintenance, improvement and development of provision for pupils whose attainment is at greatest risk
- External detailed challenge where gaps exist
- Advice and guidance on monitoring and tracking pupil attainment by group
- Training on effective strategies to support the achievement of vulnerable groups
- Support for networking and sharing good practice in relation to maximising achievement
- A range of bespoke consultancy support for senior and middle leaders in relation to providing, monitoring and evaluating the effectiveness of interventions.

Within the context of improved results for all pupils in Barnet the attainment of those entitled to free school meals has increased at KS1, KS2 and KS4, contributing to a narrowing of the achievement gap. We believe that this co-ordinated focus on vulnerable pupils is critical to maximising the efforts of individual schools to reduce this gap

b) Staff Cover

The council centrally retains funds on behalf of schools to cover costs associated with Magistrates duties, protected salaries and Trade Union facilities time. The overwhelming majority of expenditure relates to the latter.

The council has an agreed Trade Union and Employee Relations Framework which sets out a structure for the council to manage industrial relations, consultation, negotiations and bargaining. The Trade Unions recognised by the London Borough of Barnet are: GMB, UNISON, National Union of Teachers, National Association of School Masters Union of Women, Teachers, National Association of Head Teachers, Association of School and College Lecturers and VOICE. Union representatives have a statutory right to reasonable paid time off from employment to carry out trade union duties.

The council currently provides recognised Trade Unions with facilities to undertake their duties as trade union representatives which include dedicated office space, telephones etc and paid facilities/release time.

Trade Union representative's duties include negotiations and representation on matters connected with terms and conditions: pay, hours of work, holidays and holiday pay, sick pay arrangements, pensions, equality and diversity, notice periods, the working environment, job evaluation and local agreements (TA /Nursery Nurse agreement).

In addition Trade Union representatives will represent their members at local negotiation meetings on matters of local and joint interest i.e. introduction of new policies, policy changes, early notification about organisation change and/or redundancy and avoiding or resolving disagreement about working arrangement between management and employees at an early stage.

In addition trade union representatives attend meetings with and on behalf of union members in relation to grievances, disciplinarians, pay & grading appeals, attendance management , redundancy , redeployment , TUPE transfers and any other industrial relations issues affecting school based employees.

Recognised branch TU representatives currently undertake work on behalf of members in all schools (nursery, primary, secondary, special and academies). Funding for trade unions representing school based employees at a local/branch level has been funded through centrally retaining DSG. Currently this supports the collective cost for the following release time:-

- NUT – facilities time for one full time employee
- NASUWT – facilities time for 2 days per week
- UNISON – facilities time for 2 days per week.

Full or partial removal of DSG funding at the end of March 2013 would result in an inability of the council to fund and retain the current level of facilities time. In the event of a cessation in funding and facilities time, the handling of any industrial relations matters will revert to a school based official or regional representatives. Schools will be responsible for making their own arrangements for covering work areas/tasks etc and costs associated with release of officials for representation or training.

The funds currently retained also covers the cost of staff released for Magistrates duties and for a small number of posts that attract salary protection.

The request to the Schools Forum is to de-delegate the funding for staff costs

Recommendation:

- a) That maintained primary schools agree to the de-delegation of £72,193 to fund the Narrowing the Gap function in 2013/14
- b) That the maintained secondary schools agree to the de-delegation of £72,194 to fund the Narrowing the Gap function in 2013/14
- c) That, if the Narrowing the Gap function continues in 2013/14, the council develops a 'traded service' for Narrowing the Gap for Academies to purchase.
- d) That the maintained primary schools agree to the de-delegation of £93,197 to support the Staff Costs function to continue in 2013/14
- e) That the maintained secondary schools agree to the de-delegation of £33,493 to support the Staff Costs Gap function to continue in 2013/14
- f) That, if the collective Trade Union representation for schools continues in 2013/14, the council develops a 'traded service' for Trade Union Facilities time for Academies to purchase to enable Academies to utilise the collective Trade Union representation

Table 1

Treatment	Description	Primary	Secondary	Proposal
A – must be delegated, cannot be de-delegated.	1.3.4 14-16 More practical learning options		64,000.00	Delegate through the secondary AWPU.
			64,000.00	
B – must be delegated, can be de-delegated	1.4.1 Support to underperforming ethnic minority groups and bilingual learners(Narrowing the Gap)	72,193.00	72,194.00	Request for de-delegation
	1.5.2 Free school meals eligibility	3,568.00	0.00	Delegate through free school meals factor
	1.6.1 Insurance	219,122.00	89,990.00	Delegate through the primary and secondary AWPU
	1.6.2 Museum and Library Services	24,098.00	0.00	Delegate through the AWPU
	1.6.7 Staff costs - supply cover (including long term sickness)	93,196.80	33,492.60	Request for de-delegation
			595,894.40	
C –retained at same levels with no new commitments	1.2.8 Contribution to combined budgets	329,205.31	286,989.25	Retained by the local authority
	1.3.2 Behaviour Support Services	135,308.80	46,269.10	Retained by the local authority
	1.6.3 School admissions	183,721.69	158,324.91	Retained by the local authority
	1.6.5 Miscellaneous (not more than 0.1% total of net SB)	44,036.20	5,052.00	Retained by the local authority
	1.6.6 Servicing of schools forums	22,195.20	7,976.40	Retained by the local authority
	1.6.9 Purchase of carbon reduction commitment allowances	118,460.00	156,680.00	Retained by the local authority
			1,494,218.86	

10. HIGH NEEDS BLOCK

Item 10.1 SEN/High Needs Block

Author	Carol Beckman/Brian Davis
Position	Principal Education Psychologist

High Needs Pupils – Funding Arrangements for 2013/14

This report proposes the methodology for implementing the new funding arrangements from April 2013 for Barnet pupils with high needs. It covers pupils of ages from 0 - 25 in whatever educational setting they may attend. No additional funding is available to local authorities to implement the new system as the Dedicated Schools Grant (DSG) allocation to local authorities will be a 'flat cash' settlement.

Definition

The DfE defines a high needs pupil as one for whom the total cost of education and support is greater than £10,000. High needs pupils will not necessarily have a statement of SEN but are increasingly likely to have a 'single plan' for their education, health and support.

The £10,000 threshold would be pro-rata'd for pre-school and other part-time children. The threshold for placement in alternative provision such as PRU's is £8k

Place-Plus

The government is introducing the 'place-plus' funding system from April 2013 although for academies¹ it will be introduced from September 2013 in order to fit in with their financial year.

Under this system providers (i.e. maintained schools, academies, 6th form colleges, FE colleges, private, voluntary and independent schools and pupil referral units (PRUs)) will contract with commissioners (mostly local authorities) to educate and support each high needs child placed with them.

As part of this agreement, an individual cost will be agreed for each high needs pupil. The school will provide the first £10,000 of this cost (base cost) and the commissioner will pay the rest as a top-up. For Post 16 students the base cost may be higher, for pre-school lower and for PRUs £8,000.

The DfE arrived at the figure of £10,000 by adding the notional level of funding a mainstream child receives for core education (£4000) to the notional cost of providing support for children up to school action plus (£6000). Whilst this is a very generalised figure it matches fairly closely Barnet's current system for paying statement top-up funding above the first 10 hours.

Responsibilities of Local Authorities

Local authorities are responsible for ensuring all children are receiving education and all their resident high needs children are placed in a suitable provider to meet their needs. They are also responsible for paying any top-up funding for these children to the provider as well as ensuring that the child's needs are being met.

Local authorities are not responsible for paying for non-resident high needs children and there will no longer be any system for inter-authority recoupment of SEN costs.

Local authorities also have a duty to work within the available funding envelope and obtain best value for residents.

Responsibilities of Providers

Schools, academies and other providers are responsible, as now for meeting the requirements of high needs children as specified in the statement or single plan.

¹ In this document the term 'academies' also includes free schools, studio schools and UTCs.

They will need to negotiate the appropriate cost for the education and support of high needs children taking account of all general school running costs, as well as any individual extra services the child may need, and the total cost will need to be set at a level which enables the school to balance its budget.

Providers will need to ensure that the top-up is claimed for each high needs child and the money has actually been received from the commissioners.

In some cases, for instance for a child placed at a PRU, the commissioner will be the school where the pupil is on roll or the excluding school which will be responsible for paying any top-up.

Where these responsibilities increase the administration cost of the school it would be reasonable to include the extra cost in the funding for each child.

Practicalities

1. Contracts and SLAs

Whereas there is no desire to increase bureaucracy unnecessarily, providers and commissioners will need to be clear of what is to be provided for each child, how much the provider will receive and when it will be paid. In the event of any dispute a contract will protect both sides.

Barnet officers are developing a standard agreement which could then be personalised for each child by appending the statement or single plan. The DfE is also working on a proposed template.

In practise, setting up these arrangements will take some time and agreements for children with the most complex needs will be prioritised. In the meantime, existing informal and legal responsibilities should suffice temporarily.

Barnet will not negotiate agreements for non-Barnet children and providers will need to either comply with other authorities' contracts, or propose their own, perhaps based on the Barnet model. However, Barnet is working closely with other authorities via the North London and West London Alliances and the DfE, with the aim of providing a level of consistency among all commissioners.

2. Calculating the cost of the child

Many schools are concerned about how the cost of each high needs child is to be calculated.

Initially, Barnet would expect that existing funding arrangements could be translated into a starting figure which can be used to ensure stability of funding for schools and a smooth transition.

As we move forward, schools will be keen to find a way of determining the cost of new children and those whose need changes and will want to make sure all areas of costs of running the school are taken into account, but at the same time remaining competitive in comparison to similar providers. Barnet is considering introducing a banding system to help schools and LAs agree a fair cost per child, however, every school and every child is different so there are likely to be variations from this.

3. Minimum funding guarantee

Schools have been used to a minimum funding guarantee which protects their whole school budget. This continues for mainstream schools but for special schools and ARPs the MFG will work on the individual top-up not on the whole school budget. Barnet must pay a top-up for each child at such a level that if all places were taken up by Barnet children, the school would receive at least 98.5% of their 2012/13 funding. There is unfortunately no protection of the rates paid for any non-Barnet children, nor if there are vacant places.

4. Base funding

Children in ARPs will no longer be included in the main school funding formula based on the census.

They will be funded solely via Place-Plus and the Pupil Premium (for eligible pupils).

The number of places to be provided at each ARP and special school will be agreed between the LA, provider and Education Funding Agency (EFA) on an annual basis. Providers will then automatically receive £10,000 per place per annum either directly from the EFA (academies and independent schools) or via their home local authority. These places can be filled with children from any authority. The same arrangement will be made for places at PRUs, but the base funding will be £8,000 per annum per place.

Post 16 places will be funded at a higher rate. The school will claim funding through the EFA for post 16 pupils under the national 16-19 funding formula (on average £4300 per annum), and receive £5,500 (assumed being revised by DfE to £6k) as the base SEN funding.

Pre-school places in ARPs and special schools will not be base funded and the top-up will therefore be the full cost of the pupil. If Free Entitlement to Early Education (FEEE) funding is provided for those children, this would be taken off the top-up.

In mainstream schools, schools will provide the first £10,000 funding for a high needs child from their delegated budget share. This amount could be different if the child is in the nursery or 6th form.

5. Claiming / invoicing for top-ups

Bearing in mind previous comments about minimising bureaucracy in schools, there will still have to be some mechanism for triggering payment for each high needs child.

As they are non-Barnet institutions we will expect all academies, private providers and out of borough schools to send an invoice showing what is being claimed for each individual child. This would then be checked and authorised and payment sent in compliance with the agreement with the school.

Barnet maintained schools might also wish to issue invoices, but a simpler process could be an adaptation of the current system by which the SEN team sends out a schedule of payments due for each child at each school. Once checked, authorised by the headteacher and returned, the schedule could be treated as a claim form to trigger payment under the contract or service level agreement.

6. Cash flow and regularity of payments

Some schools are concerned about how often payments will be made and the impact on their cashflow.

Barnet does not propose to fund top-ups to schools in advance, but will endeavour to authorise and pay claims and invoices promptly. Balancing administration and cash flow, termly claims would seem reasonable, but this is something still under discussion. Monthly payments (not necessarily invoicing) would help ensure money moves efficiently with the child in case of transfer. The date on which the funding would be paid would depend on the date of receiving the invoice.

7. Income collection and budget monitoring

If not already in place, providers will wish to set up systems for recording the funding due for individual high needs children, ensuring that claims have been put in and the money has arrived. In preparing the school budget there is no need to "ring fence" the income and expenditure for high needs pupils (individually or as a group) unless the school wishes to do so, although commissioners will wish to be assured that there is a general match between the amount provided and the actual costs of the school to ensure best use of public funds.

8. Hospital Provision

Both Discovery Bay and Northgate School are located in Barnet hospitals but have so far been classified as Pupil Referral Units not Hospital Schools. There is now a new classification of 'Hospital Provision' for which the criteria is that the child is placed there for purely medical rather than educational reasons. It is intended that Discovery Bay becomes a hospital provision but Northgate may remain as a PRU or become part hospital provision (CAMHS linked).

Hospital provision will be funded by the EFA (via the LA) on the same level as previously and will not be subject to Place-Plus.

Local authority budget for 2013/14

At the current point in time (September 2012), local authorities have not been given indicative allocations for the 2013/14 DSG, and predictions are difficult because there will be a number of changes from 2012/13 such as the addition of two year old funding and post 16 LLDD (Learner with Learning Difficulties or Disabilities) and the redistribution of SEN funding following the abolition of recoupmnt.

It is not possible at this stage to propose actual funding levels or the high needs budget for 2013/14. Whilst the increase in pupil numbers will generate extra funding in the mainstream primary, secondary and early years sectors, the high needs block of the DSG is planned to be distributed to local authorities without consideration of pupil growth. This issue is still being considered by the DfE.

Other Issues

The LA is maintaining close links with DfE and with colleagues in other local authorities to try to develop a consistent approach, particularly around the detail of implementation such as the mechanisms for individual schools to invoice other LAs, and how to deal with problems of cash flow, debtors etc. Regular meetings continue to take place between LA colleagues and heads of special schools and ARPs. It is hoped to have detailed processes in place before April 2013.

Recommendation

The Schools Forum is asked to note and provide comments on the proposed methodology for implementing the change to funding in relation to high needs pupils on the understanding that there are still some areas of uncertainty.

11. EARLY YEARS BLOCK

Item 6.2 Nursery School Proposals

Author	Carol Beckman
Position	School Funding Manager

Barnet Nursery Schools funding for 2013/14 and 2014/15

This paper makes proposals for interim funding of the four Barnet nursery schools (Brookhill, Hampden Way, Moss Hall and St Margaret's) in 2013/14.

Background

1. The total delegated revenue budget for nursery schools in 2012/13 is just over £2m, made up of the single early years funding formula (EYSFF) and a number of historical funding factors in the main school funding formula. This is a substantially higher rate per pupil than private early years providers and maintained schools.
2. Although nursery schools are treated as schools for inspection purposes, under the reformed school funding system, from April 2013 nursery schools would only receive EYSFF leaving a funding gap of over £900,000 or about 50% of their current funding. They are not eligible for the minimum funding guarantee.
3. The nursery schools are generally open term time 8am-6pm although Hampden Way and St Margaret's building, are open all year because they are children's centres. All take children from three years old and report being full with either children taking up their free entitlement or accessing paid for childcare, so there seems little capacity to increase income without extending places.
4. In May 2012 the Schools Forum voted to support nursery schools with transitional funding in 2013/14 in recognition of their unique position.
5. In June 2012 all nursery schools submitted budgets broken down by 6 key activities that they identified as the most important parts of their offer:
 - a. Provision of the free entitlement to early education
 - b. Support for SEN
 - c. Additional childcare for vulnerable children
 - d. Early intervention and family support
 - e. Sharing good practice
 - f. Wraparound care and extended day

Findings

Area of expenditure	Average % of expenditure	Note
Provision of the free entitlement to early education for 3 & 4 year olds	70%	On average the nursery schools spend about 70% of their funding on provision of the free entitlement to 3 and 4 year olds.
Support for SEN	13%	This percentage varies on whether any children have statements of SEN
Additional childcare for	6%	This is provision of additional free childcare to the

vulnerable children		most vulnerable children.
Early intervention and family support	6%	This is work done with families and children to support parenting and prevent under achievement.
Sharing good practice	5%	As outstanding schools the nurseries often host other nursery providers (maintained, private or even international) to share their models of good practice.
Wraparound care and extended day	This expenditure is generally offset by income from fees.	

Funding Proposal for 2013/14

We propose that the four maintained nursery schools should receive funding in 2013/14 as follows:

- a) Early Years Single Funding Formula based on termly counts – as at present.
Plus, with the Schools Forum approval:
- b) National non-domestic business rates (NNDR) at cost.
- c) MFG top-up with the aim of providing 98.5% of 2012/13 per pupil funding.
- d) An expectation of cost neutral wraparound and additional childcare.

Proposals for 2014/15

Barnet Children's Service will be conducting an in-depth review of nursery schools starting in October 2012. This might look at issues such as:

- a) Delivery of services in relation to children's centres (two nursery schools are children's centres), especially around vulnerable children and family support
- b) Special educational needs
- c) Free entitlement to early education for two year olds (15 hours per week for the 40% most deprived from September 2013).
- d) Outreach and training services
- e) Pattern of provision

Recommendation

That the Schools Forum approves an interim funding formula for Barnet maintained nursery schools for 2013/14 with the expectation of receiving proposals for an alternative methodology in time for consultation and implementation from March 2014.

12. LACSEG Consultation

Author	Carol Beckman
Position	School Funding Manager
	See separate paper

13. SCHOOLS FORUM AGENDA – 15 NOVEMBER 2012

SCHOOLS FORUM 15 NOVEMBER 2012

Meeting to start at 4pm with no training session

1. Apologies for absence
2. Declarations of interest
3. Minutes of previous meeting: 11 October 2012
4. Matters arising
5. Items for Decision:
6. Items for consultation:
 - 6.1. *2013/14 Draft Schools Budget*
7. Items for information:
 - 7.1. *2012/13 Schools Budget*
 - 7.2. *2013/14 School Funding Formula Statement Return to EFA*
8. Agreement of agenda for next meeting
9. AOB