

**Meeting of the Schools Forum**

**Monday 7 December 2011**

***(4.00 pm, Conference Room 1, NLBP)***

**Attended**

Members:

- Jeanette Adak (Head, Monkfrith)
- Tim Bowden (Head, Holy Trinity)
- Jane Chew (St Margaret's Nursery)
- Susan Convery (Head, Whitings Hill)
- Shelley Dannell (Head, Pavilion Pupil Referral Unit)
- Paul Ferrie (Head, The Totteridge Academy)
- Patricia French (Governor, St Mary's High)
- Kim Garrod (Governor, Church Hill Primary School)
- Alison Gould (substitute for Catrin Dillon (Governor, Martin Primary))
- Jenny Gridley (Head, Oakleigh)
- Gilbert Knight (Governor, Oakleigh)
- Sally Lajalati (Head, Collindale)
- Andrew Macalpine (Governor, Hendon School)
- Janet McIntyre (Chair, Christ Church)
- Seamus McKenna (Head, Finchley Catholic)
- Keith Murdoch (Principal, Woodhouse College)
- Elizabeth Pearson (Governor, Livingstone)
- Angela Trigg (Principal, London Academy)
- Jeremy Turner (Head, Friern Barnet)
- Anthony Vourou (Governor, St John's N11)

LA Officers:

- Carol Beckman (School Funding Manager)
- Brian Davis (Principal Education Psychologist)
- Robert McCulloch-Graham (Director of Children's Service)
- Mick Quigley (Assistant Director Schools and Learning)
- Kerry-Anne Smith (Joint Head of Finance Children's & Adults)
- Anisa Darr (Finance Manager, LBB)

Consultant: Geoff Boyd (Independent Consultant)

Stakeholders: Keith Nason (NUT)

Observers: Maria Rosario (Acting School Support Service Manager, LBB)  
 Louis Smyth (Assistant Branch Secretary of Barnet UNISON)

Clerk: Mark Callaghan (School Resources and Support Officer)

**Not Present**

Members:

- Jayne Franklin (Head, Childs Hill)
- Clare Neuberger (Head, Menorah Foundation)
- Dee Oelman (Head, St Mary's & St John's)
- Geoffrey Thompson (Head, Mill Hill High)
- Helen Schmitz (Head, Cromer Road)
- Sarah Vipond (Early Years Working Group)
- Kate Webster (Head, QE Girls)
- Michael Whitworth (Principal, Wren Academy)

LA Officers: Nick Adams (Schools Finance Services Manager)  
 Andrew Travers (Deputy Chief Executive)  
 Val White (Assistant Director, PPP)

Other: Cllr Andrew Harper (Cabinet Member for Education, Children & Families)

<b>1. Welcome and apologies for absence</b>	
<p>Apologies for absence were received from Nick Adams, Cllr Andrew Harper, Clare Neuberger, Dee Oelman, Helen Schmitz, Kate Webster and Val White,</p> <p>KN noted that Louis Smyth, Assistant Branch Secretary of Barnet UNISON would be in attendance at the meeting as an observer.</p>	
<b>2. Declarations of Interest</b>	
<p>No declarations were received.</p>	
<b>3. Minutes of previous meeting: 10 October 2011</b>	
<p>KN advised that he attended the previous meeting as a union representative not as a local authority officer and that he is now confirmed as the union member for the Forum.</p> <p><b>Action: MC to amend the minutes of the previous meeting to show KN attending as the union representative.</b></p>	
<b>4. Matters arising (not occurring elsewhere on the agenda)</b>	
<p>No issues were raised.</p>	
<b>5. Actions from previous meeting</b>	
<p>GK updated the Forum on actions from the previous meeting:</p> <ul style="list-style-type: none"> <li>• GB emailed the addendum to the consultation response which was forwarded by VW to Cllr Harper for approval before the response was submitted.</li> <li>• DS inserted an item in the School Circular on the new school redundancies policy.</li> </ul>	
<b>6 ITEMS FOR DECISION</b>	
<b>6.1 Outcome of Barnet's Funding Consultation</b>	<b>Carol Beckman</b>
<p>CB advised that a consultation with all schools was run on changes to Barnet's school funding formula. This was made as accessible as possible and was included in the School Circular as well as advertised on the funding website. There was a very low response with only 9 completed forms received. CB stated that she would like to understand why there was such a low response so that lessons can be learnt for the next time.</p> <p>KN stated that it may be worth having an option for respondents to reply with no comments so that this can be included in response data. CB advised that there was an option for respondents to register no view, and this had been used on many of the forms received.</p> <p>GK reminded members that when there are consultation opportunities it is important that a good response is received as it provides feedback which assists the Forum to make important decisions. PFR stated that the inclusion of percentages in the analysis is misleading as it does not reflect the fact that there were only 9 responses. Where there is such a low response only the response number should be included.</p> <p>JC stated that it was pointed out at the time that there was a short time period for the consultation. GK acknowledged that headteachers have time constraints but it is important that more effort is made next time to ensure a good response.</p> <p>GK asked members whether they were happy to approve the changes to the funding formula outlined in sections one to seven of the consultation. RMG stated that it is important to make sure that everyone is in agreement and reminded members that this is their opportunity to make a decision on the funding formula. TB noted that people have been given the opportunity to respond to the consultation and have their views represented at the Forum.</p> <p>Forum members voted 11 in favour of and none against the proposed changes in sections one to seven.</p> <p>RMG noted that members agreed that schools had been consulted widely and been given the</p>	

opportunity to respond to the consultation. CB added that if there are any changes to the 2013/14 funding formula in response to announcements from the DfE, further consultations will be held and it will be important that a good response is received. RMG advised that the Forum is likely to be asked to consider the division of funding between primary and secondary schools next year.

GK asked members to vote on the proposal for providing transitional funding for one year with no loss or gain of more than £10,000 as a result of the funding of the former standards funds.

Forum members voted nine in favour of and none against the proposed changes in sections eight and nine.

<b>6.2 Funding for infant classes with more than 30 on roll – Carol Beckman</b>	<b>Carol Beckman</b>
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CB presented a paper on funding for infant classes with more than 30 pupils on roll, noting that there was an error in the paper circulated which stated 31 pupils on roll. There is pressure on places in Barnet at Key Stage 1 (KS1). The present funding formula includes an element whereby one form entry schools receive ghost funding when there are more than 30 pupils in a KS1 class as a result of the local authority asking the school to accept additional children. The authority then provides funding for as many 'ghost' pupils as required to fund an additional teacher. Statutory guidelines state that there may be no more than 30 pupils in a KS1 class unless it is for a short period, and schools have an obligation to ensure that this is adhered to. Barnet has only provided ghost funding in the past for one form entry schools as it was considered that there is greater flexibility to absorb additional pupils in a larger school's budget. This policy has worked for the last five or six years, but due to the pressure on places most schools are full, despite opening additional classes. Barnet has therefore been using the fair access policy to place individual children. The fair access policy provides £1,000 funding for the first child and £500 for each additional child within the same financial year. If there are still more than 30 pupils in a KS1 class in January, schools with more than one form entry do not receive any additional funding. There may be a number of schools in this situation in January 2012.

CB summarised the options presented in the paper with Option One being to leave the funding system unchanged. Option Two provides £1,000 per term for as long as there are more than 30 pupils in the class. Option Three proposes extending the current system to schools of all sizes. Forum members were reminded that there is no additional money for extending class sizes and changes to the policy would require diverting funds from other elements of the funding formula.

AV asked what the difference is with schools that have more than one form of entry. MQ advised that the provision for one form entry schools is historical and was built into the original agreement when it was less likely to require the fair access policy. Feedback from schools contradicts this now. CB stated that there was a belief that larger schools would be able to absorb additional pupils more easily through economies of scale.

TB advised that he has had a situation at Holy Trinity where they did not receive funding for accepting an additional pupil and asked whether any changes to the policy would apply equitably to all designations of schools irrelevant of differing admissions authorities. CB advised that it will depend on the school in question. If the school has opposed an appeal, then they would receive the funding, but if it was a decision taken by the governing body it would not. TB noted that he believes economies of scale no longer exist.

EP advised that she sits on appeals panels and has never been made aware of ghost funding. CB advised that ghost funding only applies in the year following the admission of the child, and it is funding for the number of 'pupils' which have to be added to a class size. EP stated that the tendency now is to admit the pupil.

KN asked whether the example given of 10 schools is a likely indicator of schools which will be affected and if a maximum number has been identified. CB advised that in theory changes in the policy would apply to all primary schools with infant classes, however, in reality children are generally placed in schools with high mobility which are less likely to continue over number for very long.

SC asked what will happen if a school takes in additional pupils in two year groups. CB advised that the school would receive the funding for both. SC suggested that this is an area which could be looked at by having mixed-age classes. Also if the school has multiple-form entry, there may be more than one form

with more than 30 children.

SM noted that he was also concerned about the aggregate figure and that it is not yet known which element of the schools budget the money would come from. CB advised that the money would probably come out of the AWPU and if there were a large number of schools needing extra funding, the AWPU might reduce slightly next year.

MR asked whether the ghost funding would be for the whole year and whether it would be possible to allocate it on a termly basis, so if the child leaves the school they will no longer require an extra teacher. PF advised that he has discussed this with primary headteachers and there is a general lack of understanding regarding how the current system works. Any new system which is implemented needs to be transparent. RMG added that he has received a letter from headteachers regarding this highlighting the pressures.

CB stressed that the Forum is being asked to approve a change for 2012/13 and that any option approved would be reviewed again next autumn.

AV requested an update on the fifty or sixty pupils who did not have a place in September. MQ confirmed that they have now been placed through the fair access policy and through planned permanent and temporary expansions to primary schools. The authority is looking at expected class sizes for the future and use of the fair access policy is a last resort. There is still a degree of pupil movement and many schools who have taken extra pupils have subsequently reduced in class sizes. The example given of 10 schools is the best guess based on available information.

AV asked what the financial advice of the borough is and how they would propose dealing with this issue. RMG advised that this is a difficult question to answer as there needs to be a balance between the benefit to individual schools and the financial impact to the whole schools community. Also that PF's comment about the difficulty of employing teachers for a single term should be borne in mind.

CB explained that option two would be similar to continuing to use the fair access policy where the authority would fund a school as long as it continues to have a class with over 30 pupils. This would be complicated, rely on the termly census and add work for schools and the local authority. Option Three would look at pupil numbers on an annual basis and investigate why there are more than 30 pupils in a class. It would then provide the additional funding for the whole year irrespective of whether it is required for that period. This would be the same as the existing situation, but for all schools.

EP asked what will happen if a school continues with more than 30 pupils in a class. RMG advised that they would be breaking the law.

SM asked whether schools employ an extra teacher in reality. TB advised that they do unless they can solve the problem internally. In the case of Holy Trinity they utilised a graduate teacher trainee. TB noted that the estimate of teacher cost of £40,000 is too high and that the element of available space also needs to be considered.

MQ advised that the local authority reviews pupil places on a weekly basis. The authority is continually seeking best value for money and where large clusters of unplaced children appear extra classes can be opened. One of the issues is that the statutory guidelines state that pupils must be placed within two miles safe walking distance of their home. RMG added that if a place cannot be found within this two mile limit then costs for travel are incurred by the local authority.

AT advised that a recent meeting with housing highlighted the need for greater communication between admissions and housing. This could be done within borough to minimise issues.

GK noted that the group opinion appeared to favour a variation of Option Two and suggested some options being presented at the Forum meeting on 1 February. RMG asked members if they would be happy to consider a version of Option Two via email prior to the February meeting. Officers would circulate variations of Option Two to members prior to the meeting to allow sufficient time for discussion with other headteachers. The group agreed to consult via email on variations of Option Two in advance of the meeting. KN asked whether it would be possible to receive model figures of the impact of the

options elsewhere in the schools budget. RMG state that officers will where possible provide an indication of scale and degree of impact on the AWPU.

**Action: LA to email variations of Option Two to members sufficiently in advance of the February meeting to allow email consultation**

## **7 ITEMS FOR CONSULTATION**

### **7.1 Council Budget**

**Kerry-Anne Smith**

KAS provided a summary of the formal budget consultation for the medium-term strategy advising that plans for the Children's Service have not changed from the published three year plan.

RMG noted that a presentation was given at the previous meeting and items one to four are in the minutes of the meeting on 10 October 2011. This is now out to formal consultation and the contact details are included in the paper tabled. Some elements will change before the final version goes to cabinet in 2013 to agree the budget. Officers are analysing responses and the Forum will be presented with feedback from this.

GK stated that the consultation does not seem to be very well publicised. PF advised that the mechanism is for headteachers to be advised of consultations in the School Circular and forward details to their governors. The paper tabled was from Barnet First which is distributed to households throughout the borough. GK noted that not all households receive this publication so many parents will not be aware of the consultation. RMG stated that he invests a great deal of time speaking about the budget and consultation, and would welcome any advice on how current approaches can be improved, particularly if there are any special groups which are not being reached.

KN suggested that parents could be reached by placing displays at Parents' evenings. TB added that it could also be included in school newsletters which would reach parents.

PF asked whether there is a breakdown of who responded to the consultation last year. RMG stated that this information is available and presented to cabinet members. This can be reported for the current consultation and for last year's if requested.

GK noted that a lot of the budget cuts seem to affect services for teenagers and asked to what degree the consultation is looking into the effect of this. RMG advised that many organisations are consulted including school councils, the UK Youth Parliament and the Schools Forum. Such feedback is invaluable in advising the government where budget cuts should be made.

RMG advised that the paper identified the spend on schools in relation to other services within the borough. £10m will be taken out of the Children's Service budget over the next three years and there will be a need to plug the gaps in service provision by joint working with schools and the community. The public should be encouraged to look at service provision in the totality and what is left in terms of how it can benefit schools. In 2010/11 £6.8m was taken out of the budget and £2.5 million was added, which schools managed to mitigate and the authority has improved from a good to an excellent rating. GK noted concern that when there is no further room for schools to be flexible that services may start to suffer.

GK reminded members that the consultation is also open for individuals to respond.

**Action: consultation analysis to include a breakdown of respondent groups**

## **8. ITEMS FOR INFORMATION**

### **8.1 Announcements from the DfE**

**Carol Beckman**

CB advised that there have not been any announcements from the DfE as yet regarding changes to the reformed school funding system. For 2012/13 the same funding system as in 2011/12 will continue and at this point the assumption is that the Guaranteed Unit of Funding will remain the same. Initial analysis of pupil numbers from the October census has been conducted and estimates show an increase of about £5m in the DSG for 2012/13, although this also reflects a proportionate rise in pupil numbers.

The local authority has made initial steps towards simplifying the funding formula in line with expectation that the government plans to introduce a national funding formula. It is believed that the government

intend to implement this in 2013/14 to avoid the run up to the 2015 election.

CB attended the National Fair Funding Conference in November where it was suggested that the government might change the calculation of the DSG to be based on the October census (rather than January) to allow more time for calculation. However, there are concerns that this will not show a true picture as it would omit late starters in reception and nursery classes captured by the January census.

RMG advised that the former chief executive of the YPLA has become the chief executive of the Education Funding Agency (EFA) and intends to continue with the process of simplifying funding for over 16s. It is expected that there will be significant changes around capital allocations and next year will see a large-scale exercise to determine building conditions, most likely on a sub-regional basis and conducted, or verified, by external agencies. Barnet has a good reputation for the work it has done on school buildings and there is an argument that it should be allowed to continue.

RMG stated that there has been a big lobbying campaign around self-sufficiency with an announcement of £500m in funding from central government. London was allocated £260m of this funding, with Barnet receiving £3.3m, although the borough requires £48m. This was low in comparison to other boroughs such as Redbridge who received £28m. The authority has complained but it appears that the funding was calculated based on the amount of space in schools. Barnet will be able to invest further in primary schools through prudential borrowing but not at the level required.

RMG advised that the strategy to provide a statutory duty for youth services is likely to continue. It looks as though it will be more substantial but is likely to be around partnership working. JG asked how this fits in with the cuts in the youth service. RMG advised that this is probably a reaction to the cuts. The authority is trying to minimise the impact of the cuts over the next two years. RMG stated that it will be implemented before Christmas but it will be important to see the exact nature of the statutory duty and estimate its impact on funding.

## **8.2 2011/12 DSG projected outturn**

**Kerry-Anne Smith**

KAS presented a paper to the Forum stating the DSG position at month six (September 2011). Officers have looked at current spend and projections for the £20m retained element and the position forecasts an underspend of £287,000. The main variances as identified in the paper include one-off elements such as restructuring. SEN places also form part of the projected underspend. All other budgets are projected to be spent without overspend including the contingency fund. There is potential for an underspend in recoupment for academy conversions but as this is in the contingency budget, which is viewed as a whole, this can not be guaranteed at this stage.

KAS noted that the paper circulated uses the same format as that presented to the July 2011 Forum meeting stating that any feedback on the format would be appreciated as the authority wants to make the financial reporting process as transparent as possible.

PF stated that at this stage last year there was a projected overspend of £535,000 which turned out to be a £2m underspend at the end of the year, and asked whether there is any way to know that this trend will not continue in this financial year. KAS advised that one of the main elements in the underspend carried forward from 2010/11 is accruals from other local authorities and was a one off underspend. The same processes which identified the underspend last year remain in place and this constitutes £169,000 of the £287,000 underspend. This is the best estimate of officers with the information available at the end of September 2011. BD advised that the exercise undertaken last year was a one off and that it is particularly difficult to make accurate predictions around SEN spending. This is compounded by the cost involved whereby 10 to 20 out of borough placements might amount to £1m in costs. The authority is making great efforts to ensure that spending on SEN is as efficient as possible. Changes have been made around the delivery of local provision and we are waiting to see whether this reflects the numbers requiring the service. Currently special school provision and Additional Resourced Provision are quite full.

JT acknowledged the accuracy of the financial reporting noting that a variance of 1% against projected spending should be commended.

<b>9 Any Other Business</b>	
<b>9.1 16-19 Funding Consultation : Barnet LA response</b>	<b>Carol Beckman</b>
<p>CB introduced a late paper circulated to Forum members from Dick Elms and Elaine Runswick who have been leading on the post 16 education funding consultation. A summary of the consultation was tabled at the meeting for information and Forum members were advised that they should contact Elaine or Dick directly if they wish to contribute.</p> <p>KM advised that the formula is designed to simplify the funding process, however, there is a danger that it may become a blunt tool thereby losing some of the sophistication which exists currently. Consultation with colleges has been completed and submitted with requests that the funding process retains as much sophistication as possible to represent different types of learning and enable schools and colleges to respond to individual student needs.</p> <p>GK thanked CB for the excellent delivery of the Forum training on 21 November which has resulted in members being more informed and better able to conduct their duties. AT suggested that it would be useful to have top-up sessions. CB advised that feedback from the training sessions has been analysed and there have been relevant suggestions for future topics such as benchmarking against other local authorities. Members were requested to give suggestions of topics for future session in advance so that they can be incorporated into training.</p> <p>RMG thanked members for the discussion around the consultation and wished members a happy Christmas.</p> <p>Meeting closed at 5.31pm.</p>	

#### **Dates for future meetings**

1 February 2012	4.00pm
1 May 2012	4.00pm
12 July 2012	4.00pm