

Surrey Schools Forum

Minutes of Meeting

Friday 29 September 2017, 1pm at NASUWT, Send

Approved by members at their meeting on 10 Nov 2017

Present

School and academy members:

Rhona Barnfield (Chair)	Howard of Effingham School	Academy member
Kate Keane (Vice Chair)	Ewell Grove Infant and Nursery School	Primary Head
Donna Harwood- Duffy	Dorking Nursery School	Nursery sch head
Joanne Hastings	Ottershaw CE Infant and Junior Schools	Primary Head
Clare McConnell	Bisley C of E Primary Sch	Primary Head
Lynn Tarrant	Shawfield Primary School	Primary Head
Eric Peacock	Thorpe C of E Primary	Primary Governor
Geoffrey Hackett	Stepgates Community Primary	Primary Governor (substitute)
Fred Greaves	Oakwood School	Secondary governor
Paul Jensen	Sunnydown School	Special school head
	Manor Mead and Walton	Special sch governor
Annette Crozier	Leigh Schools	
Jo Ashworth	NW Surrey SecondaryPRU	PRU member
Roger Blackburn	Queen Eleanor's CE Junior	Academy member
Andrew Carter	South Farnham Primary School	Academy member
Ben Bartlett	Hinchley Wood School	Academy member (substitute)
Ian Hylan	Tomlinscote School	Academy member (substitute)
Geoff Wyss	George Abbot School	Academy member
David Monk	Pond Meadow School	Special academy member
Sian Bath	Private, voluntary and independent nursery providers	

Non school members

Tamsin Honeybourne	Secretary to Teachers' Joint Committee
Nick Trier	Teachers' Joint Committee
Michael Hall	Guildford Diocese (CE)
Joe Dunne	Arundel and Brighton Diocese (RC)
Andrea Collings	Family Voice Surrey (SEN) (items 1-6)

Local Authority Officers

Liz Mills (LM)	Assistant Director for Schools and Learning
Lynn McGrady (LMcG)	Head of Finance for Schools and Learning (clerk to Forum)
David Green (DG)	Senior Principal Accountant (Schools Funding)

Ken Akers, Head of HR and OD and Julie Smyth, HR Reward
Manager, attended to present item 4. Frank Offer, Head of Market

Strategy, attended to present item 9.

1 Welcome, Introductions and Apologies for Absence

Apologies for absence had been received from

Jayne Dickinson	East Surrey College :	Post 16 provider rep
Judith Langley	Kings International College	Secondary Head

It was noted that Ben Bartlett and Ian Hylan were attending as substitutes, as their terms of office as full academy members had expired, but the necessary elections had not yet been held.

2 Declarations of interest

Andrea Collings declared an interest in item 4 (support staff pay).

3 Minutes of previous meeting (17 July 2017) and matters arising

Accuracy

Page 2 (minutes of meeting of 3 May 2017):

There had been 850 post 16 learners with statements or EHCPs in January 2017 (this covered all post 16 year groups, not just year 12) of which only 384 were receiving top up funding. It appeared that many of those not receiving funding had had their LDAs converted into EHCPs, but did not currently appear to require support. LM advised that many of these young people were no longer in education, eg some were working, but their EHCPs had not been closed. During the autumn those with EHCPs, but not in receipt of top up funding, would be contacted to ascertain whether continuing support was required or whether their EHCPs should be closed.

Matters arising

Page 2 Parent representation on high needs working group

Andrea Collings recalled that she had asked for parent representation on the high needs working group and had understood that the Forum would make a decision on that issue at the present meeting. She suggested that the group had made some recommendations (eg on residential provision) on the basis that those recommendations would not have an impact on families. Families had expressed concern that there had been an impact. She thought the group might have made different recommendations had there been a parent representative on it.

The Chair noted that the working group had not met since the July 17 meeting of Schools Forum, and suggested that the group should reconsider its composition generally, given its continuing role. There might be other groups which ought now to be represented.

LM emphasised the need for robust work around residential commissioning, but would not have expected the changes so far to have had the impact described. Further work would be informed by the outcome of the Lenehan review. She would welcome a review of the makeup and terms of reference of the working group, e.g. there might be a more direct role for children and young people in making their views known.

Another member argued that it was important to review membership before the group started another year's work.

The Forum recommended that a parent should join its high need working group, and that the group should review its own membership.

Page 3 Schools Pay and Reward review

Eric Peacock requested that review information should be sent directly to individual Chairs of Governors, rather than just to headteachers. Ken Akers advised that information was circulated to governors via Babcock 4S, but some governor representatives present questioned the effectiveness of that method.

Page 5 SEN savings update

DG circulated a set of slides provided by SEN commissioning colleagues, describing the proposed process of the SEN banding review.

Page 6 Review of residential provision

Andrea Collings argued that the reason why residential provision was not specified in EHCPs of pupils in Surrey residential schools was that those needs had not been assessed, not that the pupils had no such needs. She asked that the need for residential provision should be routinely assessed as part of the EHCP process. She also suggested that there was a level of anxiety among parents as to whether recent changes merely meant a redistribution of residential provision or an overall reduction. She asked for there to be communications with parents on the issue.

LM noted that the LA had recently consulted on whether residential needs should be specified in EHCPs. There had been a balanced response. She suggested that the policy work should continue as at present there was insufficient evidence as to who actually needed residential provision. She anticipated that the LA would respond to the consultation shortly, once the formal decision making process had been clarified. The need for residential provision for an individual child should be considered as part of the EHCP needs analysis and, separately, the SEND commissioning plan should include consideration of what an appropriate residential offer might be.

David Monk argued that much of the residential provision in NMI schools did not meet an identified educational need, but was due to tribunal rulings or failure to meet social care needs.

4 Surrey Schools Pay and Reward Update

Ken Akers and Julie Smyth presented this item.

School support staff Pay and reward review and job families

Earlier feedback had suggested the need for more briefing sessions for schools and particularly for academies, and for more time to complete the work on job families. The planned implementation date for job families had now been deferred until 1 April 2018, and several additional briefing meetings had been organised for schools, with invitations targeted on academies, maintained schools which had previously not attended and maintained schools which had not returned the job mapping data. School data returns were due by the end of September. The LA had to collect this data from schools because the LA did not already hold it.

Ken sought suggestions as to how the outcome might best be shared with schools. He suggested sharing the outcome with schools in early December; any later date might make April implementation difficult.

Julie advised that there had been a higher than expected number of anomalies from the mapping exercise. Babcock 4S HR was contacting schools with anomalies in order to resolve these. 82% of schools had returned the data, 579 posts had been mapped to a higher grade, 270 to a lower grade, and 163 had been seen as outside the job family. There was already a separate job family for school roles.

Ken suggested that school business managers needed support from colleagues with classroom experience when undertaking the mapping. It was also important to concentrate on the role not the individual; historically pay had sometimes been varied to reflect the skills of, or the need to retain, particular individuals.

Union representatives present expressed concern that SENCOs, as line managers of significant numbers of support staff, had not been involved in the discussions over job families> They suggested that while teaching unions did not negotiate on behalf of school support staff, they should have been more closely engaged in discussions.

2017/18 schools support staff pay review

A proposed offer had now been agreed which was supported by phase council chairs.

Council members had now agreed an offer on which unions would ballot in October and it was hoped that it could be implemented in December.

5 National Funding formula for schools (NFF)

LMcG gave a presentation on the new schools national funding formula and the issues on which local decisions were now required.

There had been few changes from the DfE's December 2016 proposals. The "hard NFF" was still an aspiration for 2020/21, although it would require primary legislation. The LA had to plan on the assumption that the hard NFF would happen in 2020/21. The LA was expected to work towards it over the next two years.

An extra £1.3bn had been added into schools funding nationally following significant concerns, expressed in the consultation, over the overall inadequacy of schools funding, although the additional funding was probably still insufficient to meet cost pressures.

The Chair noted that a senior DfE official had conceded that the £1.3bn was not new money but from cuts in other DfE budgets.

The main changes from the DfE's Dec 2016 consultation had been

- * an increase in basic entitlement (AWPU) rates;
- * a minimum increase of 0.5% per pupil in school level allocations to LAs;

- * a new Minimum Per Pupil (funding) Level of £3,300 (primary) and £4,600 (secondary) in 2018/19, rising to £3,500 primary and £4,800 secondary in 2019/20 (This was the only new formula factor).

The formula still protected those LAs which had been historically funded at a high level (particularly London boroughs). The lowest and highest funded LAs were similar to now although the difference in funding between them had narrowed. The “formula” was not needs based.

The LA would need to determine

- * which factors to use and their values;
- * the level of the minimum funding guarantee (MFG);
- * whether to apply the minimum per pupil level;
- * the ceiling level (ie limit on increases), which would follow from the choices above.

In Surrey the main changes were that:

- Deprivation funding would be reduced;
- Low prior attainment funding would be increased;
- The lump sum would be reduced.

But the impact at school level would differ between LAs, eg LAs with uniform high levels of deprivation often had lower deprivation factors because there was less need to differentiate between schools.

The impact on individual schools depended both on pupil characteristics and on history-eg some schools were already on high levels of minimum funding guarantee or on high ceiling deductions. NFF funding would start from this historic baseline, so similar schools could still be funded differently for historic reasons.

The NFF was being used to allocate funding to LAs and LAs had some choice as to how that funding was allocated to schools. But the LA could not simply pass on NFF allocations to individual schools: In particular, funding to LAs included 0.5% minimum increase per pupil and 3% ceiling at school level plus the minimum per pupil increase at school level (which overrides the ceiling). But the LA may only set the school level MFG between 0% and -1.5% (it may not set it at +0.5%). DfE officials had confirmed that this difference had been intended. Members expressed concern that it was not possible to pass on the 0.5% minimum increase to individual schools.

The minimum per pupil level was optional at local level. The local ceiling would be set based on affordability-it could be more or less than 3%.

Surrey schools would receive a combined increase of £14m in 2018/19, rising to £25m in 2019/20.

The guarantee that no school would lose under the NFF was only valid for the current spending review period (ie to 2019/20). There was a possibility that budgets might be “rebased” again after that.

Options for consultation with Surrey schools

Surrey needed to consider transitional options for 2018/19 on which to consult individual schools. LMcG set out some initial suggestions for further discussion and sought views from Forum members on these. She advised that they had still to be discussed with elected members. She welcomed any additional proposals.

- the level of the MFG

This could not exceed 0% but could in principle be set as low as -1.5%. Historically the DfE had prescribed a level of -1.5%.

LMcG suggested a 0% MFG. If all schools would ultimately gain under the NFF then there seemed little point in their losing under the interim formula.

- how fast to move to the full NFF

For example in the first year we could consider

- Using $\frac{1}{3}$ x NFF factors and $\frac{2}{3}$ x existing Surrey factors (option 1)
- Using $\frac{1}{2}$ x NFF factors and $\frac{1}{2}$ x existing Surrey factors (option 2)

Or

- using 100% NFF factors (option 3).

These options were illustrated, using 2017/18 data, but the impact on individual schools would differ in 2018/19 when data was updated.

In previous discussions a “measured transition” had been favoured. However, now that it was possible to set the MFG so that there were no losers, it might be possible to move more rapidly towards the full NFF.

Option 1 could be implemented (with 0% MFG and the minimum per pupil funding levels) without a ceiling because of the additional £14m funding..

David Monk asked for illustrations of the impact of Option 1 in year 2. In practice the school level impact would be significantly affected by data changes and potentially by DfE changes.

Option 2 would require a ceiling of around 5% because the higher NFF factors were being phased in more quickly (although no secondary school would exceed that ceiling and thus in practice it only affected primary schools).

Option 3 would require a ceiling of around 3%.

- Do we apply the minimum per pupil level locally (as this is optional)?

LMcG suggested that we should consider implementation, as headteachers had been encouraged to expect it and the overall cost was relatively small in Surrey (£0.5m-£1m). The minimum assisted those schools with low levels of funding per pupil (which often gained under other aspects of the NFF) but generally it favoured larger schools over smaller (because the calculation included the lump sum).

The minimum per pupil level overrides the ceiling, and thus some schools' increases exceeded the ceiling.

If the minimum per pupil level were not implemented, the ceiling would be slightly higher.

One member suggested that the minimum per pupil level could be phased in

LMcG noted that many of the schools now on the proposed 0% minimum funding guarantee were already on the minimum funding guarantee under Surrey's formula and thus were currently losing 1.5% per pupil each year. Thus they would still gain under the proposals compared to the existing Surrey formula.

Members made a number of points in discussion:

- Should we seek to minimise the number of schools on the minimum (thus, for example, limiting short term job losses)?
- The minimum per pupil funding level assisted schools which were already gaining from other aspects of the NFF;
- Minimum per pupil level assisted schools which had historically been the lowest funded;
- We needed to recognise that the minimum per pupil level had been a political priority for the government;
- Option 2 provided a reasonable level of increase to the greatest number of schools;
- While there may be similar numbers of schools on MFG under each option, they need not be the same schools;
- Minimising losses for "high need" schools by delaying increases to low need schools could risk the viability of some low need schools;
- The distribution of proposed in year deficits might be considered in choosing options (but this information wasn't available for academies);
- Schools need guidance as to which categories of schools are likely to gain or lose from each option;
- If a large number of options was proposed, the diversity of responses would make it difficult to draw conclusions (three might be the maximum)
- The options were only transitional measures: under the hard NFF the LA would have no discretion.

The Forum agreed to support, for wider consultation

- A minimum funding guarantee of 0%
- The implementation of the minimum per pupil limit, at £3,300 primary and £4,600 secondary;
- The three transitional options (Options 1 to 3) as described above.

These would be put forward for wider discussion with elected members.

6 High Needs Block (DFE funding outcome)

LMcG advised that the DfE had made little change to the high needs block formula compared to the Dec 2016 consultation. In particular a large part of the allocation still depended on historic spend, and the funding floor (by which no LA lost funding) remained. 12% of Surrey's allocation was floor protection (compared to 3% nationally) Surrey would receive much less funding if it was all distributed on the "needs based" formula factors excluding historic spend and floor. The DfE proposed to review the formula "within four years", and this

represented a risk to Surrey if the floor funding or historic spend factors were reduced.

Additional funding would be generated by increases in “imported” high needs pupils, which was beneficial.

LAs would be allowed to transfer up to 0.5% of their NFF Schools Budgets to fund high needs if their Schools Forums agreed.

The DfE was changing the way in which under 16s in SEN units and resources were funded. In 2017/18 places were funded at £10,000 each, but pupils did not attract mainstream funding. From 2018/19 place funding would be reduced to £6,000 per place, but the pupils would attract mainstream funding. It was recognised that average mainstream funding in affected primary schools was likely to be less than £4,000 per pupil and the LA proposed amendments to top up funding to offset that. Thus the overall funding for filled places would remain the same but the delivery method would be different. The proposals would be in the forthcoming consultation paper

DfE would require vacancies to be funded at £10,000, which represented a high needs budget pressure to the LA.

7 High needs SEN issues including 2018/19 places **Update on budget pressures and savings**

LM reported that the LA was facing significant additional pressures on the high needs budget, due to additional demand (£8m in 2017/18 and a further £7m in 2018/19).

Terms of reference were being drafted for a significant piece of work to be commissioned on the sustainability of high needs budgets, for which DfE grant funding of £0.5m was available. However, this may not be in time for any proposals to be implemented in 2018/19. The work might involve seconding people to do specific areas of work. The work would be most effective if done in partnership.

Council members still wanted to work in partnership to find solutions. However, the scale of the challenge was huge. There had been 1,000 additional EHCPs since January, which was not surprising in view of the changes to legislation and to the SEND code of practice.

Significant progress had been made towards the £16m savings required for 2017/18 but £3m of the savings were high risk and some of those previously discussed with the Forum were now unachievable. The Forum had agreed in July that any overspend could be carried forward to 2018/19 and met from savings in that year.

A £3m increase in placement costs was forecast based on previous demand. In particular, when mid year placements were necessary, NMI schools often had to be used because Surrey schools were full. An extra £7m savings may be needed in 2018/19.

Placement forecasts were from the finance team, based on previous year trend data. This was difficult for post 16s, where historic data was limited, particularly for the FE sector, although two years' data was now available.

High needs funding did not grow in proportion to the number of high needs pupils. This was a national concern. .

One member expressed surprise at the government's failure to recognise the increase in SEND demand.

One member asked whether Surrey would be seeking to topslice the Schools Block. Officers had not yet had an opportunity to discuss the new guidance with Members and therefore could not be certain of their views given the current financial pressures. It was acknowledged that savings meant doing things differently and that this would take time.

Increasing use of specialist schools was not a sustainable solution.

David Monk asserted that the LA had sufficient funds but was spending too much from high needs DSG on residential NMI placements because children were not receiving the social care support which they needed. He also asserted that the LA should cut non statutory SEN services.

LM advised that the high needs working group had been established to look at issues such as these. For example it had been looking at the residential offer. Some non statutory services (such as nurture groups) saved costs later through early intervention. She welcomed suggestions from colleagues as to changes which might be made.

Pooled decision making arrangements had been established for placements partly funded by social care to ensure that social care bore the right share of costs. A higher proportion of costs was now being met from social care funds, but there was a need for a better understanding of these placements and a need to focus on meeting SEND needs.

£27m was being spent on SEN transport because many pupils were travelling long distances to Surrey specialist provision. Alternatives were being sought, eg making it easier for parents to transport their own children. David Monk argued that the highest transport costs were actually in taxi transport to primary schools, rather than to special schools..

Members asked whether any of the funding provided for Care in the Community or for mental health could be used to fund any of the HNB pressures.

Reviewing the number of specialist places funded in academies and in FE colleges

DG reminded the Forum that if the LA wanted to change the number of high need SEN places funded in academies and colleges, it had to apply to DfE/ESFA. The deadline for 2018/19 changes was 17 November and the Forum was entitled to be consulted. The deadline had only been advised in late September and was earlier than the comparable deadline last year.

He proposed that the issue should be referred to the high needs working group, to report back to the Forum at the next meeting.

One member expressed concern at a further additional task being given to that group.

The Forum agreed that the high needs working group should consider proposals for changes in the number of SEN places in academies and colleges.

8 Surrey Schools funding consultation (autumn 2017)

Delegation of former combined services funding for confederations and partnerships (£657,000)

The former combined services funding for confederations (£657,000) could no longer be devolved directly to confederations in 2018/19. However, as it remained within the LA's central schools block baseline, the LA proposed to delegate it instead and to include such a proposal in the schools funding consultation paper. The proposed method of delegation (40% pupil numbers, 55% FSM6 and 5% IDACI using DfE bands) was that which produced least turbulence, based on 2017/18 data.

DG confirmed that in the two areas where confederations no longer existed, funding was already devolved to individual primary schools, using the same formula used to distribute funding to confederations. These schools would no longer receive devolved funding under the current proposal, but would receive delegated funding like all other primary schools.

The current method of allocation could not be used to delegate funds because some of the factors were not on the DfE list of permitted delegated factors.

DG anticipated that funding would be outside MFG and ceiling in 2018/19, but might be within minimum per pupil funding levels, although we could ask for an exclusion.. He anticipated that it could be available for 2018/19 and 2019/20 but not in 2020/21 under the hard NFF.

As the funding was delegated, while schools would share the current confederation funding, they could not be required to spend it on confederations

One member noted that arrangements were being made to cease confederation activities in her area

Another member suggested that schools' priorities might have changed, eg towards spending on school improvement. Another noted that comparable funding was already delegated to secondary schools.

DG warned that academies might not receive additional funding until September because of the way in which ESFA calculated their budgets¹

¹ Although the DfE will deduct academies' share from the LA from April 2018

The Forum supported the proposed delegation, and the proposed method of delegation, as a basis for wider consultation.

Delegation of former combined services funding for school improvement (£430,000)

DG proposed that this should be delegated on the basis of pupil numbers, in the same way as had been done in 2017/18 for the first part of this budget (and maintaining secondary/primary ratio). Again it ought to be outside MFG/ceiling but perhaps not outside MPPL.

The Forum supported the proposal as a basis for wider consultation.

Surplus de-delegated primary contingency funding

DG proposed that £330,000 of surplus de-delegated contingency funding should be returned to primary schools in 2018/19. This would be refunded on the basis of 100% of 2015/16 contributions plus 50% of 2016/17 contributions, previous refunds had used up surpluses from 2013/14 and 2014/15. The LA would apply for this to be excluded from MFG/ceiling and from minimum per pupil level calculations.

The Forum supported the proposed refund of de-delegated contingency

Future of primary behaviour support de-delegation

LM suggested that a series of options could be considered for this service, including a fully traded service (if sustainable), or changing the staffing mix based on experience with the secondary sector (eg fewer teachers and more support staff). Further work would be done imminently.

The service would need to be traded anyway once the hard NFF was introduced.

Minor changes arising from the introduction of the NFF

- Reception uplift

This provides additional funding for pupils entering reception classes between October and January (and hence not on the Oct census), but the funding is included in the MFG calculation whereas the additional pupils are not. It is not a part of the NFF, and for many schools the benefit is nullified by the impact of MFG. DfE refused an application to exclude reception uplift funding from MFG in 2017/18.

Therefore, DG proposed to consult on discontinuing the reception uplift in 2018/19.

The Forum supported the proposal to consult on ceasing the reception uplift

- Looked after children factor

Surrey has a formula factor for looked after children (£796/pupil), but this must cease once the hard NFF is implemented..

In 2018/19, "Pupil premium plus" for looked after children is being increased by £400 (£1,900 to £2,300). Therefore DG proposed that the formula factor for looked after children should be reduced by £400, otherwise there would be an increase in funding for looked after children in 2018/19, followed by a larger reduction, probably in 2020/21, when delegated funding for this group must cease under the hard NFF.

The Forum supported consultation on reducing delegated funding for looked after children

Level 2 notional SEN funding: definition

Currently level 2 notional SEN funding within the budget share is defined in part, in terms of deprivation funding, using eligibility for free school meals.

Under the NFF, a wider range of factors will be used to distribute deprivation funding and the amount distributed on free school meals will be reduced. Therefore, DG proposed that the total of deprivation based level 2 SEN funding should remain the same, but that it should be expressed as a standard proportion of all of the deprivation factors in the 2018/19 funding formula (yet to be agreed).

The Forum supported the proposal to consult on changing the basis of level 2 SEN funding.

Basis of de-delegation of behaviour support funding (primary sector only)

Part of the funding de-delegated for behaviour support was based on eligibility for free school meals. As, under the NFF, a wider range of indicators would be used for deprivation, DG proposed that, should de-delegation of behaviour support funding continue, the sum de-delegated should be based on the same proportion of all deprivation factors, not just on FSM.

DG reminded the Forum that funding for behaviour support had been de-delegated from 2013/14, because that was the only way by which the LA was permitted to retain DSG for this purpose (It was not considered by DFE as a high needs SEN service).

The Forum supported the proposal to consult on changing the basis of de-delegation of funding for behaviour support, should de-delegation continue.

9 Early years funding (3-4 year olds free entitlement)

Frank Offer presented this item. He explained that he was seeking comments from the Forum on proposed changes in early years funding, prior to wider consultation. The results of the consultation would be shared with the Forum at its December meeting. The proposed changes were less extensive than in 2017/18, but were based on similar principles.

Proposed increase in contingency

An increase in the contingency was proposed because there was a high level of uncertainty over takeup. Providers were funded on a termly basis whereas the LA was funded on an annual basis. Any underspend on contingency would be taken forward within the early years block. The level of the

contingency would be kept under review and a significant underspend would mean a lower level of contingency in future years, both because the underspend could be carried forward and because of the reduced level of demand it implied.

Proposed increase in centrally retained funding

In 2017/18 the Forum had agreed to retain 5% of 3-4 year old funding to support central services. Frank proposed that 5% should be retained in 2018/19 (a higher cash figure). This proposal would require Schools Forum approval.

Experience had shown that current staffing levels were too stretched, and that further staff were needed to support brokerage of the 30 hr entitlement, in particular to support access for vulnerable families.

In answer to a member's question, Frank advised that the service had moved to trade training.. While not all of the "centrally retained" services were statutory, some others (eg information provision) were important for vulnerable families.

Sian Bath agreed that some additional central funding was needed, as the LA needed to have sufficient staff to fulfil its statutory duties, including ensuring that sufficient places were available. Some training was also statutory.., Providers needed sufficient funding but the LA needed sufficient staff to fulfil its duties too.

The Forum supported the proposals as a basis for consultation

10 Local funding formula issues

Growing schools funding: exceptional requests

a) Danetree School

DG reminded members that, at the previous meeting, members had considered a request from Danetree School for a change in the way vacancy funding was calculated for bulge classes where a school's PAN exceeded a multiple of 30. The Forum had asked for additional information on bulge classes, which was circulated at this meeting.

The Forum declined to support the request by Danetree School for a variation to the vacancy funding calculation.
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b) Broadmere Primary School

DG reminded the Forum that primary schools admitting an infant bulge class were normally only funded for vacancies while that class was in the infant years ie vacancy funding did not continue into junior years. At its 9 January meeting (item 9), the Forum had upheld this rule, but had left open the possibility that schools could apply to be considered as special cases. Broadmere Primary School had asked for such consideration, on the basis that it had three bulge classes which collectively would have around 25 unfunded vacancies when they were all in junior year groups They were

asking for a commitment in principle for the future (which would have to be subject to the LA still setting the funding criteria for growing schools at the time). As there were three bulge classes, each in different year groups, the school could not reduce the number of vacancies without vertically grouping, and schools with bulge classes were not usually expected to do this in order to manage a bulge,

The Forum was asked to consider whether the school's circumstances merited a special case being made- ie isolated area, high deprivation, several bulge classes. DG suggested that, if the Forum was minded to consider the case, a threshold should be set (eg fund vacancies after the first ten) and that if the funding was given to Broadmere, it should also be given to other schools in similar circumstances. A threshold of 10 places would cost £44k for Broadmere and £127,000 if it covered the 20% most deprived schools (on 2017/18 data).

DG noted that low deprivation schools generally had less difficulty in filling vacancies in bulge classes.

The Forum agreed the proposal in principle, and the proposed thresholds of the 20% most deprived schools (by FSM) and funding of vacancies above the first ten

Minimum funding guarantee variations and use of average pupil numbers

DG asked the Forum to support applications to the DfE for a number of proposed variations to the minimum funding guarantee calculation:

- To exclude rents from the MFG where a school was no longer liable to pay rent;
- To exclude split site funding from MFG where a school was no longer a split site school;
- To exclude 2017/18 contingency allocations (one off funding)
- To provide a second year transitional lump sum to Send CE Primary School (merged school), the total lump sum to be 70% of two normal lump sums (yet to be decided, subject to outcome of consultation under item 5)..

The Forum supported the proposed variations

Use of average pupil numbers for schools losing bulge classes

DG proposed to apply to the DfE to use average pupil numbers to fund schools losing bulge classes. Thus bulge classes expected to leave in August 2018 would be funded for 5/12 of the year only, affecting 15 schools in 2018/19. DG reported that all of these schools had been written to individually and two had objected to the reduction, one simply in the basis that it was a reduction, the second on the basis that it was disadvantaged because it had several bulge classes.

The Forum supported the proposed use of average pupil numbers for schools losing bulge classes

Average pupil numbers for schools extending age range

DG explained that he was required to advise the Forum of the schools involved, but that the DfE no longer needed to approve these

Minimum per pupil level calculation

DG explained that the MPPL was funded to LAs based on comparing the per pupil value with a school's total pupil led funding and lump sum, but when the LA passed it on to a school, the calculation also included premises factors and mobility² and thus the value received by the school would be less than the value received by the LA. The LA was allowed to seek approval for a variation. He proposed to seek a variation to exclude premises factors (ie rates, rent and split site funding). He noted the wide variation in rates funding, in particular, among schools of similar characteristics (eg community vs academies).

The Forum supported the proposed variation.

11 Schools Forum issues

Additional meeting: Friday 10 November 2017 1.30pm at NASUWT, Send
(note different starting time)

To consider outcome of schools funding consultation paper and to make recommendations to Cabinet.

Officers would aim to issue the consultation paper in week of 9 Oct, with a response deadline of early November. To maximise the time available for schools to respond it was unlikely that Schools Forum could be given more than a few days' advance notice of the outcome.

The Chair emphasised the importance of responding to the consultation and of helping colleagues to understand the proposals.

Election of Chair and Vice Chair

Nominations to reach LMcG by 31 Oct 2017

12 Any other business (if agreed by Chair in advance)

None

Meeting ended 4.20pm

Date of next meeting: Friday 10 November 2017 , 1.30pm at NASUWT, Send (note: additional meeting)

² Although mobility is also included in the calculation of MPPL to schools, in practice no school expected to benefit from MPPL received mobility funding in 2017/18