

SCHOOLS FORUM

At a meeting of the Schools Forum on Monday, 23 January 2017 at The Board Room - Municipal Building, Widnes

Present: Councillor T. McInerney, Observer
A. McIntyre, Education, Inclusion & Provision, HBC
A. Jones, Financial Management, HBC
A. Jones, Democratic Services, HBC
J. Rigby, Secondary Academy Representative (Chair)
K. Albiston, PVI Representative
A. Brown, Nursery Schools Representative
J. O'Connor, PVI Representative
J. Coughlan, Primary Representative - Infant School (part)
L. Feakes, Primary School with Nursery Unit Representative
D. Burke, Secondary Academy Representative (part)
R. Collings, Primary Representative - Infant School
N. Hunt, Pupil Referral Unit Representative
L. Davies, Secondary Academy Governor Representative
K. Landrum, Primary Representative - VA School
J. Vincent, All Through Schools Representative (part)
E. Hall, All Through Schools Representative (Sub)
E. Haver, Special Academy Representative
K. Lawton, Primary Academy Representative
S. Corner, Secondary Academy Representative
S. Ainsworth, Special Schools Representative (Sub)
A. Aleksic, EAL Co-ordinator (Minute SCF21)
G. Crolla, Edsential (Minute SCF22)
P. Boxall, EFA Observer

Action

SCF17 APOLOGIES FOR ABSENCE

Apologies had been received from S. Broxton.

SCF18 MINUTES & MATTERS ARISING

The minutes from the meeting held on 10 October 2016, were agreed as a correct record.

SCF19 FORECAST DSG OUTTURN 2016-17

The Forum received a report with the forecast outturn position of DSG budgets for 2016-17.

It was reported that as part of the budget setting process the forecast outturn position for the current financial year was reviewed, to give an indication of the carry forward available for 2017-18. This was carried out as it became obvious that there would be insufficient grant to cover the needs for 2017-18.

The Forum was presented with the findings for the Schools Block; Early Years Block and High Needs Block, as outlined in the report.

In summary, it was noted that with funds brought forward from previous years it was expected that £1.4m would be carried forward to 2017-18 which would be needed to minimise reductions in budgets. In 2016-17 there was a carry forward of £1.6m, but £171,000 was used to balance the budgets in 2016-17.

The Forum would receive a more detailed outturn report in the Summer Term.

RESOLVED: That the report be noted.

SCF20 SCHOOLS BLOCK BUDGETS 2017-18

The final funding formula for Primary and Secondary schools for 2017-18 was presented to the Forum.

Members were reminded that at the October meeting of the Forum decisions were taken on how the funding formula should be allocated to Halton's Primary and Secondary maintained schools, academies and free school, following a consultation.

The report discussed the following:

- Budget availability for Primary and Secondary Schools;
- De-delegated Budgets;
- Income Deprivation Affecting Children Index (IDACI);
- Minimum Funding Guarantee;
- Finalisation of Schools Block Budgets;
- Indicative Schools Block Budgets;
- English as an Additional Language; and
- Other grants for Primary and Secondary schools;

At the October meeting Schools Forum questioned the impact of using the EAL funding factor in place of the Service Level Agreement with St Chad's (*commentary on the EAL service was provided in paragraph 3.8 of the report*) so the Forum was required to make a decision as to whether the EAL funding factor is used for the 2017-18 budgets.

Officers initiated a supplementary consultation exercise following this, which closed on 18 January 2017 and the responses were tabled at the meeting (Appendix 1).

After considering the consultation results and Officer recommendations, the Forum agreed to use the EAL3 funding factor in 2017-18 at a total value of £146,828.

Officers then referred Members to Appendix 2 which detailed the Schools Block funding formula cash values for 2017-18; and Appendix 3 which gave Indicative Schools Block budgets before ESG delegation.

A further Appendix was tabled (4), which listed the centrally retained schools block budgets, excluding ESG budgets, which required Forum approval. The Forum agreed to this.

RESOLVED: That Schools Forum

- 1) notes the report;
- 2) agrees to the use of the EAL3 Funding Factor in 2017-18 budgets at a total value of £146,828; and
- 3) agrees to the centrally retained schools block budgets as listed in Appendix 4.

SCF21 ENGLISH AS AN ADDITIONAL LANGUAGE (EAL) PRESENTATION

The Forum welcomed Anna Aleksic, the EAL Co-ordinator, who presented details of the EAL Service to the Forum, including information about the latest demand for the Service, which was unprecedented.

She advised that the EAL was now a traded service so a Service Level Agreement (SLA) was required between parties. A draft copy of the SLA was distributed to Forum Members.

The need to encourage schools to use the Service following the introduction of the SLA was stressed, as failure to maintain sufficient numbers could result in the Service being lost.

Following queries it was noted that extra staff would be recruited if demand for the Service dictated. Also, requests from early year's settings for the Service had been minimal so far.

Ann McIntyre informed Members that the costs of EAL support for schools taking in Syrian refugees in the near future would be met by the LA from the grant it had been allocated.

RESOLVED: The Forum agreed to promote the EAL Service Level Agreement being offered by St Chad's.

SCF22 LEARNING OUTSIDE THE CLASSROOM PRESENTATION

The Forum received a presentation, '*Educational visits and all Learning Outside the Classroom*', from Gaby Crolla, Manager for Health, Wellbeing and Learning Outside the Classroom (LOtC), *Edsential*.

She explained that Edsential was a Community Interest Company (CIC) and that any profits made were reinvested into the business. It was stated that the mission of Edsential was to improve the outcomes for children and young people and she explained via the presentation how LOtC worked and how Halton had embraced the programme.

For the information of the Schools Forum, Gaby tabled:

- the LOtC Service Offer for 2017-18 which was available for all early years settings, primary and secondary schools and youth departments;
- leaflets informing of the Conway Centres and the learning experiences available at them; and
- information on the Maths and English Enrichment Programme.

RESOLVED: That Schools Forum notes the presentation.

SCF23 SCHOOLS BLOCK BUDGETS 2017/18 - FORMER EDUCATION SUPPORT GRANT (ESG)

The Forum received a report on the transfer of the Education Services Grant duties and costs to the Dedicated Schools Grant.

It was reported that in the 2015 Spending Review of the Department for Education (DfE), a saving of £600 million was announced by removing the ESG general funding element from 2017-18. It was recognised that local authorities would need to use other sources of funding to pay for education services once the general funding element had been removed. Regulations were therefore being amended to allow local authorities to retain some of their schools block DSG to cover the statutory duties that they carried out for maintained schools.

The report presented the makeup of the Education Services Grant (ESG) up to April 2017 and the two elements that funded two different groups. It went on to explain that the general duties element was ending in August 2017 and funding previously allocated through the retained duties element would be transferred to the Schools Block DSG.

In the report were the responsibilities set out by the DfE which Officers proposed to be funded by DSG for the Retained Duties element and the General Duties element. Schools Forum approval was required for Retained Duties element and maintained schools members approval was required for the General Duties element.

Officers referred Members to Appendix 5 which presented the former ESG transferred to DSG for 2017-18 for retained duties, which totalled £288,514.00. The Forum agreed to this.

Officers then referred Members to Appendix 6 which presented the former ESG transferred to DSG for 2017-18 for general duties, which totalled £1,118,469.00.

Officers informed the Forum that £400,491 of transitional funding would be received (for the April to August 2017 period) for the General duties element, which was being used to offset the total amount needed. Officers were also looking to use £97,094 of School Improvement grant funding recently announced, subject to there being no ring fenced requirements of how it was spent.

This left a balance of £620,884 to be funded. The EFA were allowing local authorities to gain permission for de-delegation of this amount from maintained schools. In Halton, this would equate to roughly £34 per pupil.

Appendix 7 presented the Indicative Schools Block Budgets for 2017-18 after Full ESG delegation, which was not being recommended by Officers. Officers then went on to propose that the Dismissals budget of £127,110 is delegated from maintained schools (primary, secondary and special) and the balance would be funded from the DSG carry forward for 2017-18 only.

Appendix 8 presented the Indicative Schools Block Budgets 2017-18 after part ESG delegation (which was being proposed). Officers pointed out that they were expecting a carry forward balance in the region of £1.4m which would mean there was roughly £900,000 of carry forward monies available for 2017-18 onwards. A Task and

Finish sub group was required to review the services by the general duties grant and how they would be funded from 2018-19 onwards.

The maintained schools representatives agreed to this.

RESOLVED: That Schools Forum

- 1) note the report;
- 2) agree that services previously funded by the Retained Duties ESG are funded by DSG from April 2017;
- 3) agree that the services previously funded by the General Duties ESG are funded by DSG by way of de-delegation from maintained schools less transitional funding; and
- 4) agree to £288,514 Schools Block to be retained centrally to be spent on former ESG duties as listed in Appendix 5.

SCF24 SCHOOL IMPROVEMENT FUNDING UPDATE

The Forum received an update on the recent Government announcement in relation to School Improvement Funding.

It was announced in November 2016 by the Secretary of State for Education that resources would be made available to ensure that the number of school places continued to rise, as they had done in the last year by 420,000.

It was confirmed on 12 January 2017 that Halton would receive £97,094. No conditions of grant had been released to date, however it was indicated that the grant would not be ringfenced. If this was the case the money would be used to support former ESG general duties costs and specifically School Improvement Support.

RESOLVED: That the report be noted.

SCF25 APPRENTICESHIP LEVY

The Forum received a paper which explained the new Apprenticeship Levy being introduced from April 2017.

It was noted that from April 2017 the way in which apprenticeships were funded was changing as part of a series of wider reforms to the apprenticeship system in England. Employers with a payroll of more than £3 million

would be required to pay an apprenticeship levy and would be able to access funding for apprenticeship training and assessment via a new Digital Apprenticeship Service.

The report discussed the Levy and who would pay it; who would not pay; the apprenticeship roles available; the duty placed upon the Public Sector; the funding of the extra cost of the Levy; and Halton's Working Group.

Officers advised the Forum that they would forward any updates on the Apprenticeship Levy as and when they were received.

RESOLVED: That the report be noted.

SCF26 INDICATIVE DSG ALLOCATIONS 2017-18

The Forum received the indicative Dedicated Schools Grant allocations for 2017-18, which were released by the Education Funding Agency (EFA) on 20 December 2016, as follows:

		2017-18	2016-17
Schools Block allocation	=	£83.01 M	£84.71 M
Provisional Early Years allocation	=	£9.08 M	£5.34 M
High Needs Block allocation	=	£15.79 M	£14.50 M
TOTAL		£107.87 M	£104.54 M

The report provided commentary on each allocation and the Forum was referred to Appendices 4, 5, 6, 9 and 12, which provided the breakdown of the budget's allocations.

Members' concerns over the High Needs Block allocation was noted.

RESOLVED: That the report be noted.

SCF27 HIGH NEEDS BLOCK FUNDING UPDATE 2017-18

The Forum received an update on the recent Government announcement in relation to High Needs Block funding for 2017-18.

It was noted that following the Stage 1 consultation over the summer and the subsequent change of Secretary of State for Education, the proposal to implement a formula

basis for the allocation of high needs block funding to local authorities was postponed until April 2018.

Members were referred to Appendix 9 which provided a breakdown of the High Needs Block centrally retained budgets. The following was reported in relation to Halton's High Needs funding:

- Funding would be provided of £444,000 (or 74 places) for Post 16 CCP's and FE colleges;
- Halton's baseline High Needs block was set at £15.12M and with the £0.44M added this came to £15.56M;
- An amount of £1,740,000 has been top sliced for commissioned places in special academies, primary and secondary academies with resource bases and non-maintained special schools, including the £444,000 for FE colleges and CCPs.

The Forum agreed to the above funding in relation to High Needs. It was noted that a Stage 2 consultation on how the High Needs Block funding was allocated to local authorities was announced on 14 December 2016, with a closing date of 22 March 2017. A sub group would be set up to work up a Schools Forum response.

RESOLVED: That Schools Forum

- 1) notes the report; and
- 2) agrees to the centrally retained High Needs budgets as listed in Appendix 9.

SCF28 SPECIAL EDUCATIONAL NEEDS REVIEW

The Forum received an update on the review of Special Educational Needs.

It was noted that since the Schools Forum meeting in October 2016, a further three meetings had been held with the SEN Review Group. One of the first key areas of focus of the group had been the arrangements and funding of enhanced provision / top up funding. The group was provided with a detailed list of the allocations made to each school and setting in 2015-16 which showed the level of funding allocated and also the variation in allocation between the schools / settings.

The following points were noted by the Review Group

following the meetings:

- Concern was expressed about the equity, transparency and sustainability of the current arrangements, particularly given the variation in allocation between schools and settings and the total sum of money allocated. It was suggested that the current allocation methodology linked to additional staffing hours was too rigid and more sustainable support could be provided if schools and settings could use the funding to access training and support or /and purchase resources.
- There needed to be a greater emphasis on supporting and developing young people to be independent.
- The current panel arrangements should continue but the balance of numbers should be changed with more representation from schools and settings.
- It was important to have representatives from Finance at the panel meetings to provide advice and support.

The Forum was advised that a revised model for allocation of Enhanced Provision / Top Up Funding had been circulated which proposed several changes, as outlined in paragraph 3.5 in the report. Officers requested that the Forum support the proposals to revise the approach to the allocation of enhanced provision for a 12 month period.

The consultation document that was sent to schools and academies and their responses were tabled for the information of the Forum.

RESOLVED: That Schools Forum

- 1) agrees to the proposal to alter the allocation of enhanced provision / top up funding for a period of 12 months; and
- 2) agrees the funding methodology for allocation of enhanced provision / top up funding for April 2017.

SCF29 EARLY YEARS FUNDING 2017-18

The Forum received the Early Years National Funding Formula for 2017-18. It was noted that two options had been modelled for Halton's Early Years Funding

Formula and these were appended to the report with the consultation document sent to all Halton providers in early January 2017.

Officers tabled:

- a) Appendices 10 (a) and 10 (b) which presented the responses to the consultation;
- b) Appendix 11 – the proposed Early Years Funding Formula 2017-18; and
- c) Appendix 12 – Early Years Block – centrally retained budgets.

The Forum agreed to the Early Years Funding Formula and the centrally retained budgets.

RESOLVED: That Schools Forum

- 1) notes the report;
- 2) agrees the proposed funding factors for the Early Years Funding Formula for 2017-18 as set out in Appendix 11; and
- 3) agrees the centrally retained Early Years budgets as set out in Appendix 12.

SCF30 THE NATIONAL FUNDING FORMULA

The Forum received the indicative Schools Block budgets for 2018-19 and 2019-20 and the National Funding Formula (NFF).

Appendix A showed the indicative Schools Block budgets using the NFF against the October 2015 census data (as used to set the 2016-17 schools block budgets). The data showed the actual 2016-17 schools block budget, the 2018-19 indicative NFF budget for the transitional year and the 2019-20 indicative NFF budget without the transitional protection.

The Stage 2 National Funding Formula consultation was announced on 14 December 2016 and would close on 22 March 2017. Schools and Academies were encouraged to submit individual responses.

It was agreed that a task group would be set up to put forward the comments of the Forum.

RESOLVED: That the report be noted.

Meeting ended at 6.12 p.m.