
BURY SCHOOLS' FORUM

MINUTES

of the meeting of Bury Schools' Forum on
Tuesday 14th January 2020
Bury Elizabethan Suite – Lancaster Room

In Attendance:

Nursery

None in attendance

Primary

Fiona Robinson	Headteacher
Claire Simon	Headteacher
Simon Waddington	Headteacher

Secondary

Tina Owen	Headteacher
Brian Roadnight	Headteacher (Chair)
Joanna Filkins	School Business Manager
Heather Standbridge	School Business Manager
Lawrence Yarwood	Governor

Special

Helen Chadwick	Headteacher
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Special Academy

None in attendance

Pupil Referral Unit

None in attendance

Academy

Sue Armstrong	Headteacher
Neville Kenyon	Governor

Non-Schools

Karen Hopwood	NASUWT
Geoff Hirst	NAHT
Natasha Shears	NEU

Children's Services Department:

Julien Kramer	Interim Assistant Director for Education & Inclusion
Steven Goodwin	Head of Strategic Business & Finance
Alison Vidler	Principal Finance Officer (Schools & Systems Finance)
Elissa Reeve	Senior Finance & Business Manager (Clerk)

Education Funding Agency (EFA) Observers

None in attendance

1. Introductions

The Chair welcomed Forum members.

2. Apologies for absence

Rachel O'Neil	Headteacher
Martin Van Hecke	Headteacher
Lisa Corrigan	Headteacher – Heather Standbridge represented
Jonathan Wilton	Headteacher – Joanna Filkins represented
Susan Southworth	Governor
Elaine Turner	School Business Manager
David Waites	Headteacher

3. Minutes of the last Meeting

The minutes of the meeting held on Tuesday 26th November 2019 were checked and agreed as a correct record of the meeting.

4. Matters Arising from the Minutes

Page 3 Item 5B - Risk Protection Arrangement (RPA)

Steven Goodwin informed Forum that the DfE will provide their recommendations regarding risk protection arrangements for schools on Friday 17th January. The Local Authority will not renew their current insurance arrangements for schools until the recommendations are reviewed. Steven Goodwin will email Headteachers with further information upon receipt of the information from the DfE.

Page 3 Item 5D – Money to Follow NOT Permanently Excluded Pupils

This matter will be discussed at the next BAPH and BASH meetings which have not taken place since the last Schools' Forum due to there not being many school days between meetings.

Page 4 Item 6 – SEND Analysis

Julien Kramer confirmed that the impact has been beneficial but until a way of evidencing this impact has been devised the analysis cannot be provided but will aim to report back at a future Forum meeting.

Action
JK

5. Formula Funding 2020/21

5a) 2020/21 Indicative Funding Allocation

Steven Goodwin presented his report which had previously been circulated and summarised:-

Minimum Funding Level

Regarding the minimum per pupil funding levels, the DfE consultation response issued on the 19th December 2019 confirms the Minimum Funding Levels are now mandatory at £5,000 for secondary and £3,750 for primary schools putting primaries on the path to receiving at least £4,000 per pupil the following year.

Julien Kramer confirmed that he had met with unions and associations regarding an in-service review of the education services the Local Authority provides. The review looks at statutory and non-statutory duties with a view of streamlining services and releasing further resources to assist schools' budgets. The Forum emphasised that it was important for the LA to retain the high quality cost effective services which make positive impacts.

Lump Sum

The Primary sector Lump Sum has been protected through the transition to the National Funding Formula (NFF). To avoid financial turbulence the LA proposes to allow a one year transition in 2020/21 and move to the actual NFF Lump Sum in 2021/22. This will see the Primary Lump Sum reduce from £125,000 (19/20) to £120,000 (20/21) and then £115,000 (21/22). Available headroom within the formula can assist the transition in 20/21. Secondary schools are already at the NFF Lump Sum level as they were more than compensated through other factor gains in their transition to NFF.

The proposal for a phased approach for the Lump Sum for primary schools for another year was agreed by the Primary representatives.

Growth & Falling Rolls

The Growth funding element of the NFF allocations is new and can only be used to support growth in pre-16 pupil numbers to meet basic need, support additional classes needed to meet the infant class size regulation or contribute to meet the costs of new schools

The growth fund must not be used to support schools in financial difficulty and general growth due to popularity is managed through lagged funding. The 7% threshold for in-year growth of pupil numbers to receive further funds is no longer applicable.

Criteria for allocating growth funds will be considered at BAPH & BASH meetings but are to contain clear objective trigger points for qualification and a clear formula for calculating allocations with these criteria applying to all schools on the same basis. Compliant criteria would generally contain some of the features such as:-

- support where a school or academy has agreed with the authority to provide an extra class in order to meet basic need in the area (either as a bulge class or as an ongoing commitment)
- additional support where a school has extended its age range (the majority of funding would be paid through the funding formula where the local authority should seek a variation in pupil numbers)
- support where a school has temporarily increased its pupil admission numbers (PAN), by a minimum number of pupils, in agreement with the authority
- support for KS1 classes where overall pupil numbers exceed a multiple of 30, by a minimum number of pupils

Regarding falling roles, LA's can set aside Schools Block funding to create a small fund to support good schools with falling rolls. It is not designed to support schools which have had difficult Ofsted inspections and subsequently suffer falling rolls as it is aimed at protecting schools judged good or outstanding. Criteria for allocating funding should contain clear objective trigger points for qualification, and a clear formula for calculating allocations

Growth & falling rolls funding is new and the LA would like to discuss this further at BAPH and BASH meetings to avoid any turbulence and ensure the regulations are followed. Steven Goodwin will look at other LA's examples and provide an analysis on the growth and falling roles funding at BAPH, BASH & Funding Review Group meetings.

R1: Schools' Forum agreed to the allocation of Growth and Falling Rolls funds to be applied to 2020/21 using the available balance of Schools Block subject to a detailed review of criteria and funding rates.

R2: Schools' Forum agreed to a detailed review of criteria and funding rates to be considered by their Funding Review Group and agreed by BAPH and BASH.

Bury – Dedicated Schools Grant (DSG) – Provisional Allocations

The provisional allocations sheet has been updated with validated data from the October 2019 Census and the confirmed DfE allocations, and is very positive.

- Schools Block is receiving a £7,836,567 increase in funding for 2020/21 which is £306,367 more than originally forecasted.
- The High Needs Block is receiving a £2,667,341 increase for 2020/21 which is £117,470 more than originally forecasted.
- The Central Schools Block is receiving a £1,725 increase for 2020/21 which is £2,077 less than originally forecasted.
- The Early Years Block is receiving a £250,045 increase in for 2020/21 which is £18,211 less than originally forecasted. This is subject to the January 2020 census and will hopefully be a more positive update then.

Overall the DSG is receiving an extra £10,755,678 increase in funding allocation in 2020/21 which is £403,549 more than originally expected.

Bury – School Formula Review for 2020/21

Schools Forum were presented with the unit values to be applied to the formula allocation methodology for 20/21. In line with the previous consultation outcomes the formula unit values were shown including Area Cost Adjustment inflation. The Area Cost Adjustment inflation is new and recognises that the Greater Manchester area has slightly higher costs than other areas (except London).

The Forum discussed the IDACI rates decrease especially IDACI A under the primary heading. The reduction in IDACI figures could mean that some schools lose significantly. It was confirmed that the National Funding Formula puts more emphasis under the free school meal and free school meals ever-6 deprivation allocations. Historically as the funding formula was a local decision Bury LA put more emphasis under the IDACI therefore Bury had a higher starting point for the transition to NFF. All unit values have been applied in accordance to the transition to NFF and the DfE would reject any alternative that moved away from the NFF values.

The Forum acknowledged that there will be less decisions to be made on a local level and there will be limitations with the NFF. The hard formula is currently proposed by the DfE to be implemented in 2021/22.

R3: Schools' Forum agreed to the 2020/21 formula unit values as per the table presented in accordance to the National Funding Formula (NFF).

De-Delegated Items 2020/21

There has been an ongoing reduction in the de-delegated items in respect to a greater number of academies for whom de-delegation is not applicable and specifically for Contingencies and Behaviour Support which was intentional in order to provide schools with greater levels of delegated funding that is not subject to de-delegation (top slicing).

The introduction of the 'Hard' National Funding Formula will see de-delegation removed, however the DfE are still uncertain exactly how they are going to apply this and will consult in due course. De-delegation therefore remains in the meantime for Schools' Forum to consider.

Curriculum Language Access Service (CLAS).

In 2018/19 Secondary Schools voted not to de-delegate to Curriculum Language Access Service (CLAS). Primary schools have previously opted to continue to de-delegate and all maintained primary school budgets continue to contribute to the CLAS service. Melanie Griffin, Head of CLAS has submitted a paper to Schools Forum and Primary Forum representatives were asked to consider the three options:-

- 1) Continue de-delegation from the Maintained Primary sector at the same unit value as 2018/19 and 2019/20 at: £214 = £243,627
- 2) Continue de-delegation from the Maintained Primary sector as per the increased 2020/21 unit value at: £541 = £615,899
- 3) Cease de-delegation from the Primary sector, thus ensuring schools retain maximum delegated funding and they can enter into buy-back traded arrangements if required with the CLAS service (as Academies and Maintained Secondary schools may do).

Forum queried why the national unit value at £541 for English as an Additional Language (EAL) was significantly higher than the LA's de-delegated value of £241. It was confirmed that the NFF has apportioned greater per-pupil funding to factors including EAL and whilst Bury has moved to this increased value in schools and academies delegated budget determinations it has not increased the de-delegated amount in order to ensure maintained schools achieve maximum gain in their delegated budgets and do not see greater levels of de-delegation that could adversely affect overall funding for individual schools and see greater financial contributions to CLAS where not all maintained schools may benefit to the same degree as the amount removed from their budgets.

R4: After consultation with colleagues the primary sector voted to continue to de-delegate in respect of CLAS on the same unit values as 2018/19 & 2019/20.

Further feedback why some schools would prefer not to de-delegate will be fed back to Julien Kramer as Interim Assistant Director for Education & Inclusion.

Other De-Delegated Items

There are no plans to review any of the other de-delegated items at this stage and Forum were requested to recommend the unit values identified in the report including

- Schools Causing Concern @ £6 per pupil
- Free School Meals benefit checking (includes Universal Credit) @ £5 per pupil
- Trade Union Facilities Time @ £4 per pupil

R5: Schools' Forum agreed to the unit values identified and discussed.

Central School Service Block (CSSB)

Forum considered the allocation of the Central School Service Block and it was confirmed that historically the LA does not receive enough budget for the national copyright licences and for 2020/21 there are DfE reductions to the historic commitments from the CSSB.

The lean services review taking place across the education services, and including out of borough placements and school transport, will aim to use savings achieved to help balance the CSSB budget.

The Forum queried the £10k reduction in the Safeguarding in School Officer budget and highlighted that this was an important role. It was confirmed that some budgets receive funds from other areas and this is only the amounts funded via the Central School Service Block. A new Safeguarding in Schools Officer has been appointed in January 2020. The Forum asked if a job description for the role was available.

R6: Schools' Forum agreed to the CSSB funding recommendations.

Early Years Block

The Maintained Nursery School (MNS) protection has now been confirmed for 2020/21 and will ensure the financial sustainability for Bury's Maintained Nursery School (Hoyle) for at least another financial year. The future funding for all Maintained Nursery Schools nationally remains subject to DfE review and Schools' Forum will be updated on any changes, whether positive or negative, to the future years' funding allocation in due course.

Early years have been given a small funding increase of 8p per hour. In order to ensure providers receive the maximum gain possible within the increased Early Years funding provided for 2020/21 the Local Authority will not increase the retained element in line with the inflationary increase and will ensure the full gain is allocated directly through the Early Years Single Funding Formula (EYSFF) to all early years providers.

Concern was expressed in respect to the increase of 8p which is not enough to cover staffing increases and cost pressures faced so in real terms the providers are losing.

Forum requested the figures behind the LA's early year's costs. It was confirmed that the LA retains around only 3% of the Early Years funding which contributes to services such as early years advisors, early years eligibility checks and disability access checks etc as there is a significant amount of administration involved. The LA is allowed to retain up to 5% but has opted to help providers by minimising costs. It was highlighted that the statutory Section 251 document has all the Early Years funding itemised and the EY Block balances each year.

The Forum queried if childcare vouchers assist providers and it was confirmed that vouchers are a different funding source, some families' access the EY block funding others via childcare vouchers or private payments.

Forum asked if there was anything Forum could do to assist EY providers as it was acknowledged that this was a vital stage which could have a long term impact throughout a pupil's education.

It was discussed that private providers and maintained early years providers receive the same rate under the Early Years Single Funding Formula (EYSFF) and there cannot be any differential funding targeted to maintained provision without it being provided to private providers also.

It was confirmed that early years is a priority with the LA looking at early years provision and early years SEND. The LA recognises the importance of this area and invests in SEND whether children have an Education Health Care Plan (EHCP) or not. There is a new division under Children's Services department for Early Help which encompasses Early Years and Children's Centres support and School Improvement are also working with early years providers and analysing performance data to enhance the transition process to Primary.

R7: Schools' Forum agreed to the recommended hourly rates for Early Years funding of £5.28 for 2 year olds and £4.18 for 3 & 4 year olds.

5b) Impact on DSG & Schools

The Balancing the Schools' Block of the DSG report showed that out of the £129,939,963 total schools block funding £129,602,288 would be allocated to Schools & Academies and the remaining £337,675 balance would be retained to support growth & falling rolls. Indicative budgets will be available shortly but will not be distributed until the early years census and SEN figures are confirmed. The balance figure above is subject to change once all actual data has been received and input into the schools and academies delegated budget determinations, namely for Business Rates

The Summary Impact on Schools & Academies shows that 37 primaries are down on pupil numbers yet only 7 primaries will see a budget reduction which shows that the vast majority of primary schools are gaining under the new delegated budgets.

Two primaries are down 25 pupils on their roll and one has a reduction of 44 in pupil numbers. The maximum budget reduction is £51,000 however Forum were advised that this specific school actually gains on their overall funding comparison when the increased SEND funding is counted.

Forum were informed that Yesoiday HaTorah Primary Academy has now split into separate boys and girls schools which means there are now 64 primary schools in Bury.

There are 6 secondary schools seeing a pupil number reduction with a maximum of 75 pupils fewer in one school, yet only one secondary school has a budget reduction of circa £6,000 on the schools formula, however when the increased SEND funding is added there are no secondary schools losing in comparison to the previous year.

Forum were presented with the financial impact analysis for schools which demonstrates an extra £3m funding for primary schools and £4.5m for secondary schools. The overall funding gains, when increased SEND funding is included, demonstrates an extra £4.8m for Primary and £6m for Secondary is included in their delegated budgets for 2020/21. Total £10.8m additional funding allocated directly to schools. In addition schools and academies continue to benefit from the investment into strategic SEND and Inclusion priorities and provision.

It was highlighted that although the DfE funding for schools is great news the High Needs Block still has a significant deficit to recover, the Early Years Block inflation only increase is insufficient and is suffering from cost pressures and the Local Authority is still facing significant austerity cuts to budgets which needs to be managed and where the LA will require schools and academies to use their delegated funding effectively.

6. Date of Next Meeting

The dates of the next meetings were confirmed as follows:

Tuesday 16 June 2020 - 4 pm – Lancaster Room, Elizabethan Suite

7. Future Dates

Tuesday 20 October 2020 - 4 pm – Lancaster Room, Elizabethan Suite

Tuesday 24 November 2020 - 4 pm – Lancaster Room, Elizabethan Suite

8. Any Other Business

Steven Goodwin said that a paper is coming out shortly regarding a new Pupil Premium policy and a review on how funds are allocated with a view of getting the funding to the school to support the child quicker. Bury is looking to enhance its procedures and accelerate their methods.