

Schools Forum Meeting

7 September 2015

Venue: Warren Wood Primary Academy, Arethusa Road, Rochester, Kent ME1 2UR

Time: 3.30pm to 5.30pm

Agenda

1. Minutes of the meeting held on 6 July 2015 and matters arising
2. Will Adams Value for Money Report
3. 2015-16 DSG Budget Allocation
4. Schools Block Centrally Retained Budgets and Pupil Number Variations 2016-17
5. School Funding Reform 2016-17
6. Elections
7. AOB
 - Medway Scheme for Financing Schools
8. Date of next meeting

5 October 2015 – 3.30pm until 5.30pm – Warren Wood Primary Academy, Arethusa Road, Rochester, Kent ME1 2UR

Agenda Item 2: Report to Schools Forum: Fair Access – Year 11 Placement Funding

1. At a meeting of the Schools Forum on 8 October 2014, the Schools Forum agreed to support a pilot programme for the placement of Year 11 pupils in Medway Schools, and agreed funding to support the administration and quality assurance costs for one academic year.
2. The pilot programme has now concluded and has been reviewed by the participating schools, and Local Authority officers.
3. The review has concluded that the pilot scheme has been successful in meeting the agreed objectives. There have been significant benefits in reducing the time taken to place pupils moving to Medway in year 11 and seeking a school place.
4. A total of 36 students have been placed through the new arrangements in this academic year, and 21 of those students completed their studies in the host school. In previous years, these placements would often be delayed over a period of months and would occasionally only be resolved following a direction by the Local Authority, or via the Secretary of State.
5. During the pilot programme, the Local Authority has been able to secure placements for all pupils within a reasonable time period, and no directions have had to be issued.
6. The scheme has been supported effectively by Will Adams, who have accepted all pupils meeting the criteria onto their roll, and then provided support to the host school.
7. A report from the Medway Secondary Heads Association is attached.
8. **Confirmation of the success of the programme**
 - 8.1 Due to the success of the programme, the Local Authority has sought support from the Schools Forum to continue to fund the cost of the administration and quality assurance work undertaken by Will Adams for another year.
 - 8.2 At its meeting on 6th July 2015 the Schools Forum agreed to continue the funding for the next academic year, subject to a report to the Chair setting out the success of the project. It was agreed that the details of the project would be reported to the next meeting of the Schools Forum. The report from the Secondary Heads and the improvement seen by the LA in the placement of pupils confirms the success of the programme and gives justification to the continued support by the School Forum of £68,000 for the next academic year to meet administration and quality assurance costs

Medway Secondary Heads Association review of funding to support year 11 placements through Fair Access, utilising Will Adams

The Local Authority have provided Medway's secondary heads support for this process via the funding of an additional member of staff at Will Adams with direct responsibility for coordinating with schools providing robust placements and quality provision.

In particular the programme has resulted in:

- Speed of placements improving, leading to a direct impact on positive learning
- Time missing education reduced impacting on positive learning
- Support for reintegration provided by a dedicated member of staff impacting on positive learning.
- No refusals this year for students placed through FAP.

All the above have meant that students who are hard to place have been quickly placed, supported and guided through their placement enabling them to achieve success in year 11, rather than getting lost in the system or victim of school refusing places to protect the vulnerability of the school.

Author

Catherine Burnett

On behalf of Medway secondary Heads Association.

July 2015

Agenda Item 3: 2015-16 Dedicated Schools Grant Budget Allocation

1. Background

- 1.1 The Education Funding Agency (EFA) requires all Local Authorities (LA's) to provide information on the Dedicated Schools Grant (DSG) to its Schools Forum (SF).
- 1.2 The DSG is made up of the following notional funding blocks:
- a) Schools Block – Pupil numbers (October 2014) multiplied by the SB basic unit of funding (£4,357.95). The LA's SB allocation is adjusted when a maintained school converts to academy status.
 - b) High Needs Block – based on 2012-13 budgets but clarified by submissions to the EFA and adjusted for payments made directly by the EFA.
 - c) Early Years Block – estimated census pupil numbers multiplied by the EYB basic unit of funding (£4,495.99) and adjusted when actual numbers are known.
- 1.3 The Schools Forum is asked to remember the funding in each block is notional and non-ring-fenced to each individual block. The DSG is used to fund educational activities in Medway either through budgets distributed directly to schools, educational providers or centrally retained for education purposes.

2. Current 2015 - 2016 DSG Allocation

- 2.1 Table 1 below shows the latest DSG allocations notified by EFA in July 2015. The allocations are after deductions for academies recoupment and direct funding of High Needs places by the EFA have been taken into account.

Table 1

2015-2016 DSG Allocation	£m (Initial Allocation)	£m (July Adj)	£m (Adjustment)
Schools Block (SB)	69.634	69.634	0
High Needs Block (HNB)	26.340	26.274	(0.066)
Early Years Block (EYB)	12.476	15.271	2.795
Total	108.451	111.179	2.728

- 2.2 The initial 2015 – 2016 DSG allocation didn't include any provision for two year old funding. LA's were notified of their two year old funding in July 2015.
- 2.3 Further deductions to the LA DSG allocation may occur throughout the year due to academy conversions or adjusted pupil numbers for early years and the schools forum will be update accordingly.
- 2.4 Table 2 below shows how the DSG allocation in table 1 has been reconciled to the LA 2015-16 budgets.

Table 2

	School Block £000's	High Needs Block £000's	Early Years Block £000's	Total £000's
Delegated to Schools	66.670	0	0	66.670
Centrally Retained Budgets	964	0	0	964
Schools Non delegated budget	2.000	0	0	0
Transfer between blocks.	(2.000)	2.000	0	0
High Needs Budgets	0	26.274	0	26.274
Early Years Budgets	0	0	15.271	15.271
Total	67.634	28.274	15.271	111.179

- 2.5 Table 3 shows the breakdown of the centrally retained budgets as agreed by the schools forum on the 8 January 2015.

Table 3

	Amount £	Total £
<u>Growth Fund</u>		
2014-15 on going commitments	96.145	
New classes for 2015-16	275.000	
Total Growth Fund		371.145
<u>LA Statutory Functions</u>		
Co-ordinate Pupil Admissions	365.685	
School Forum Administration	5.000	

Total LA Statutory functions		370.685
<u>De-Delegated (LA maintained Schools Only)</u>		
Onside – Primary Schools Only	110.872	
Minority Ethnic Pupils – Primary and secondary schools	79.054	
FSM Eligibility Assessment – Primary and secondary schools	12.649	
Trade Union Facilities – Primary and secondary schools	19.149	
Total De-Delegated (LA maintained Schools Only)		221.724
Total Centrally Retained Budgets		963.554

3. Recommendations

- 3.1 The Schools Forum is asked to **note** the amount and deployment of the local authority's 2015- 2016 DSG allocation.

Author:

Maria Beaney

Finance Business Partner Education & Schools

24.08.2015

Agenda Item 4: 2016-2017 School Block Changes Centrally retained Budget Pupil Number Variation

1 Background.

- 1.1 The Schools Block of the Dedicated Schools Grant funds budgets/funding delegated to schools/academies via the funding formula as well as the funding retained by the Local Authority (LA) to support schools.
- 1.2 LAs can only retain funds for the provision of central education services in circumstances which have been set by the Department for Education (DFE); these are known as **Centrally Retained Budgets** and fall into three headings;
- a) Growth Fund
 - b) De-delegated Services
 - c) Statutory Functions of the Local Authority
- 1.3 Each year the Schools' Forum is required to approve the funding needed for the Growth Fund and the De-delegated Services.

2 Action for the Schools Forum

- 2.1 The Schools Forum is asked to:
- a) **approve** the LA requests to adjust the 2016-17 Funding Formula by a variation in pupil numbers; which will then need to be authorised by the EFA explained in section 5.
 - b) **decide** on the LA requests for 2016-17 centrally retained (explained in section 3) funding for;
 - i. the Growth Fund
 - ii. De-delegated Services
 - c) **confirm** the funds to be centrally retained for the Statutory Functions of the Local Authority in 2016-17 explained in section 6.
- 2.1 All Forum members can participate in these discussions but, in accordance with schools forum regulations, **only 'school members'** of the Forum can vote. The Voting Matrix will show eligible voting members.
- 2.3 For De-delegated Services, which is not applicable for academies or non-maintained schools, **Primary and Secondary maintained schools need to decide separately** if the LA should provide the service centrally for their phase. The Voting Matrix will show eligible voting members.

2.4 For ease of use it is suggested a vote is undertaken after each section.

3 Growth Fund

3.1 LAs can create a Growth Fund by centrally retaining an amount of the Schools Block – Dedicated Schools Grant before the funding formula is calculated for schools/academies.

3.2 The Growth Fund is ring-fenced and can only be used for the purposes of supporting growth in pre-16 pupil numbers for schools/academies.

3.3 The Growth Fund cannot be used to support school/academy deficits or fund a general increase in pupil numbers.

3.4 The 2016-17 Growth Fund can be used to;

- a) Meet on-going agreed commitments from the previous year's Growth Fund
- b) Meet basic need places though agreed temporary Bulge Classes
- c) Provide additional support for agreed temporary increases in school/academy PANs. (Permanent PAN increases are to be funded via the Funding Formula)
- d) Provide additional support where a school/academy has temporarily extended its age range due to basic need, in agreement with the LA. (Permanent age range changes should be funded via the Funding Formula)
- e) Meet the cost of newly opened schools/academies where created to meet basic need. This includes the following pre start-up costs,
 - i) appointment of staff
 - ii) purchase of goods/services necessary to admit pupils

On 10th September 2014 the Schools Forum agreed that basic start lump sum of £55,000 will be paid for each new class opening for the first academic year only.

3.5 Where payments are being made to academies based on the September 2016 intake, the LA is required to fund from September 2016 – August 2017. For schools this will be September 2016 – March 2017. This reflects when the additional funding based on the October 2015 census actually feeds through to school/academy funding.

3.6 Any funds remaining, or agreed deficits, at the end of the financial year will be carried over to the Schools Block – Dedicated Schools Grant and reallocated to maintained schools/academies through the funding formula.

3.7 The LA will explain the amounts requested to be centrally retained, in order for the Schools Forum to discuss and reach a decision.

3.8 The Schools' Forum can agree on local arrangements when offering support to schools/ academies from the Growth Fund, as long as this support is covered in 3.4 above.

3.9 The DFE has asked that LAs use "clear trigger points for qualification and a clear method for calculation allocations" within the Growth Fund.

3.10 The LA are requesting a Growth Fund for 2016-17 based as follows:

- a) The 2015-16 Greenvale Infant School Bulge Classes in Year 2 will form the year 3 support for New Horizons and so there are no on-going Bulge class commitments.
- b) An additional 3 bulge classes are required in Medway for 2016-2017 and the LA is in negation with the schools concerned.

Table 1 below shows the cost to the authority. The lump sum is £55,000 per class and the APWU is shown as £2,747 although the final AWPU will not be known until January/February.

Table 1

School					Total Cost
	Total Pupils	Est. Basic AWPU Cost	Number of Classes	Total new Classes Lump Sum Cost	
A school in the Chatham/Rochester Area	30	82,410	1	55,000	137,410
A school in the Gillingham Area	30	82,410	1	55,000	137,410
A Primary Academy in Strood	30	82,410	1	55,000	137,410
	90	247,230	3	165,000	412,230

The actual payment will be calculated using the October 2016 census.

3.11 The Schools' Forum are asked to;

- a) **Approve the funding for the new classes being opened.**
- b) **Approve an initial growth fund of £412,230**

Please refer to the Voting Matrix to see who is eligible to vote on which options.

4 Pupil Number Variations

4.1 Changes to pupil numbers as a result of permanent PAN increases must now be funded via the Funding Formula and not the Growth Fund anymore.

4.2 The Schools' Forum had previously decided that the following support should be given to schools/academies with PAN increases in order to allow the PAN increase in the entry year to work its way through the school/academy. This decision will continue.

Infant	3 years maximum support
Junior	4 years maximum support
Primary	7 years maximum support
Secondary	5 years maximum support

This support would cease as soon as capacity reached or if a change back to original PAN or PAN reduction.

4.3 Estimated pupil numbers will be weighted to take account of the different school and academy funding periods using the estimated September intake. For schools then, 7/12ths (i.e. September 2017 – March 2018) and academies 12/12ths (i.e. September 2017 – August 2018).

4.4 LAs will estimate the pupil numbers basing these estimates also on previous data. This may mean that estimates may be less than the new PAN so as to reflect likely take-up in September 2016. This also means that these estimated pupils will form part of the school/academy pupil roll so will be funded not just on the Basic Entitlement (AWPU), but on all factors within the formula.

4.5 An adjustment will be made the following year by comparing the estimates to the actual pupil numbers within the October 2017 census. Any pupil number variances will then be made in 2017-18.

4.6 For 2016-17 the LA will be requesting the following variation to pupil numbers (i.e. *additional* pupil numbers over and above the upcoming October 2016 census) to reflect the *additional* likely take-up in September 2016 shown in table 2 below:

Please note:

- New classes are shown in red and highlighted.
- New Horizons year 3 pupils are the Greenvale Bulge Class Pupils

Table 2

Table 2

School	Maximum Pupil Increase Per Class	Number of Pupils by Year Group								Total Pupil s	Weighte d Total Pupils
		R	1	2	3	4	5	6			
Napier Primary Academy	30	30	30	30	30	-	-	-	120	120.0	
Wainscot Primary School	30	30	30	30	30	-	-	-	120	70.0	
Delce Junior Academy	40	-	-	40	40	40	-	-	120	120.0	
Brompton Westbrook Primary Academy	15	15	15	-	-	-	-	-	45	45.0	
Saxon Way Primary Academy	30	30	30	-	-	-	-	-	90	90.0	
Cedar Primary School	15	15							30	30.0	
Cuxton Infant Academy	10	10							20	20.0	
Cuxton Junior Academy	10	10							20	20.0	
New Horizons Primary Academy	30	90	90	60	60	-	-	-	390	390.0	
Hundred of Hoo Academy - Primary Phase	30	30							60	60.0	
Woodlands Academy	30	30							60	60.0	

		29 0	29 0	19 5	16 0	10 0	4 0	-	1,07 5	1025.0
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4.7 The Schools' Forum are asked to approve pupil variation numbers of 1025 (665 additional estimated places + 360 total estimated places). Please refer to the Voting Matrix.

4.8 Table 3 below shows which of the schools in Table 2 above will attract the new class's lump sum start costs of £55,000 per class.

Table 3

New classroom Lump sum £55,000

School	Maximum Pupil Increase Per Class					
		R	3	Total Pupils	Number of classes	Total Pupils
Napier Primary Academy	30	30		30	1.0	55,000
Wainscot Primary School	30	30		30	1.0	55,000
Delce junior Academy	40		40	40	1.0	55,000
Saxon Way Primary Academy	30	30		30	1.0	55,000
New Horizons Primary Academy	30	90	60	150	5.0	275,000
Hundred of Hoo Academy - Primary Phase	30	30		30	1.0	55,000
Woodlands Academy	30	30		30	1.0	55,000
		240	100	340	11.0	605,000

4.9 The Schools' Forum is asked to approve the new class start up funding of £605,000. Please refer to the voting matrix.

5 De-Delegations

- 5.1 There is a short list of budgets that are currently held centrally that must be delegated to schools/academies through the funding formula in 2016-17. However, the LA can ask the Schools Forum's approval for them to be 'de-delegated' in order for these funds to be pooled centrally and managed by the LA.
- 5.2 Any underspends at year-end will be carried forward to De-delegations or to the Schools Block of the Dedicated Schools Grant.

- 5.3 De-delegation applies only to mainstream maintained schools (so not academies, special schools or PRUs) as only these schools would benefit from the services that are funded centrally.
- 5.4 It is, however, possible for academies, special schools and PRUs to buy into these services as part of the LA's 'buy-back' service.

5.5 Support for Minority Ethnic Pupils or Underachieving Groups

Underperformance of vulnerable groups in a school is a key trigger for Ofsted and will potentially place a school into a 'requires improvement' category. There are two big challenges. One is where students arrive with little English and limited previous experience of school. The second is our working class boys. There is no simple mechanism for targeted funding to individual children under the formula delegation. As Medway experiences changes in inward migration different schools year on year receiving changing profiles of students.

When many Medway schools are fragile in terms of their attainment, it is challenging to support individual schools with particular groupings of minority pupils and underachieving groups.

For 2015-16 the Schools Forum approved a de-delegation of £4.50 per pupil (which came to £92,245) from both primary and secondary schools, in order to support the LAs work in targeting underperformance.

The LA is seeking approval for 2016-17 from the Schools Forum to de-delegate the same as last year, of £4.50 per pupil from primary and secondary schools. Please refer to the Voting Matrix.

5.6 Assessment of Eligibility for Free School Meals

For 2015-16 the Schools Forum approved a de-delegation of £0.72 per pupil (which came to £14,759) from both primary and secondary schools, in order for the LA to check pupils' eligibility for free school meals on behalf of LA maintained schools.

The Forum is asked to approve for 2016-17 the same de-delegation again of £0.50 per pupil from primary and secondary schools. Please refer to the Voting Matrix.

5.7 Trade Union Facilities

For 2015-16 the Schools Forum approved a de-delegation of £1.09 per pupil (which came to £22,345) from both primary and secondary schools, which enables the teaching unions to represent their members in disciplinary, grievance, and complaints hearings and to respond to LA consultations on policies and procedures which affect teaching staff in Medway schools.

The budget is used to reimburse schools which employ the union reps so the schools concerned don't bear the cost of covering their absence. Giving teachers access to local expert trade union support can have benefits for both schools and the LA in terms of improved employee relations in schools.

The LA is seeking the Forum's approval for 2016-17 to de-delegate again £1.00 per pupil from primary and secondary schools. Please refer to the Voting Matrix.

6 Statutory Functions of the Local Authority

- 6.1 The DFE allows local authorities to continue to centrally retain funds for their statutory functions up to the level retained in 2012-13 (so no new commitments or increases in expenditure).
For 2016-17 the LA are requesting to retain the same amounts as 2014-15 and the Schools Forum are asked to **confirm** the amounts below:

£365,685 for Co-ordinated Pupil Admissions processes
£5,000 for Schools Forum administration

Any underspends at the year-end will be carried forward to fund the Statutory Functions of the LA.

7 Next Steps

- 7.1 The LA will now consult with schools and academies and report back at the next Schools Forum.

Maria Beaney

Finance Business Partner Education & Schools

Agenda Item 5: 2016 – 2017 School Funding Reform Arrangements and Changes

1. Introduction

- 1.1. The funding guidance published by the Education Finance Agency (EFA) in July 2015 is designed to help local authorities and their Schools Forums to plan the local implantation of the funding system for 2016 to 2017.
- 1.2. The local authority must engage in open and transparent consultation with all maintained schools and academies in the area as well as with its school forum about any proposed changes to the funding formula including the methods, principles and rules adopted.
- 1.3. The latest EFA guidance states “In light of the Spending Review and any consequent changes to the schools finance regulations (which would be consulted upon), the local authorities may have to review the planned modelling undertaken.”

2. Schools and Academy Funding Formula 2016-17 Timetable.

- 2.1 At the last meeting (6 July 2015) an indicative timetable was presented pending update from the EFA. Appendix 1 now shows an updated 2016-2017 school and academy funding formula timetable.

3. Levels of funding for Local Authorities

- 3.1. The only proposed change to the local authorities 2016 to 2017 school block funding is in respect of non-recoupment academies (NRA) funding and is designed to be cost neutral for local authorities. However this change will not affect Medway.
- 3.2. Medway Councils 2016 - 2017 Schools Block Basic Unit of Funding (SBUF) will be £4,357.89 per pupil. This is the same level of funding received for 2015-16.
- 3.3. All academy and free school funding is initially included within the LA's total DSG allocation. The EFA then deducts the funding it needs to pay academies and free schools.
- 3.4. The early years block per pupil funding for 2016 to 2017 will be confirmed after the spending review (25 November 2015) and the high needs block funding will also be confirmed after the spending review.
- 3.5. The LA will continue to have flexibility to move funding between the blocks, provided they comply with requirements on the minimum funding guarantee (MFG) and have the agreement of the Schools forum and the Secretary of State on any increase to centrally held budgets.

4. Funding Formula 2016-17

- 4.1 This guidance has been produced to help the schools forum to determine how much to allocate through the funding formula.
- 4.2 After the deduction of the centrally retained budgets, funding movement between blocks and any repayment of overspends from previous year the remaining SB allocation must be distributed to schools through the schools and academies funding formula.
- 4.3 There are 11 factors included in Medway Schools and Academies Funding formula, which are:

a) Basic Entitlement

A compulsory factor which assigns funding according to the age-weighted pupil unit (AUPW) multiplied by a unit per pupil cost to each individual school or academy based on the October census.

There may be different funding rates for key stage 3 and 4 as well as primary age pupils.

b) Deprivation

A compulsory factor which assigns funding to pupils from deprived areas. LA's can either use the free schools meals indicator and/or the income deprivation affecting children Index (IDACI); Medway use both.

Different funding rates can be attached to each level of the IDACI system and the funding rates can be different for primary and secondary.

c) Prior Attainment

This is an optional factor which acts as a proxy indicator for low level, high incidence special educational needs.

Funding is applied for primary pupils not achieving the expected level of development within the early years foundation stage (EYFSP) and for secondary pupils not reaching L4 at KS2 in either English or maths.

d) Looked After children

This is an optional factor where a school or academy is paid a unit cost for any child who has been looked after for one day or more as recorded on the LA SSDA903 return as at 31 March 2015. Mapped to schools using the January school census data

e) English As another Language

This is an optional factor where EAL pupils may attract funding for up to 3 years after they enter the school system.

f) Pupil Mobility

This is an optional factor which measures the pupils who entered a school during the last 3 years who did not start in August, September or January if a reception class.

There is a 10% threshold therefore if a school/academy has a 12% mobility factor then 2% (12% - 10%) of the school/academy pupils would attract mobility funding.

g) Sparsity

This is an optional factor. In order to qualify for this funding the school or academy must meet two criteria; first they are located in an area where pupils would have to travel significant distance to the nearest school; and second, they are small schools.

Primary schools/academies must have a sparsity distance greater than 2 miles and an average year group of less than 21.4

Secondary school/academies must have a sparsity distance greater than 3 miles and an average year group of less than 120.

All through school/academies must have a sparsity distance greater than 2 miles and an average year group of less than 62.5.

The maximum amount which can be awarded to a school or academy is £100,000.

In the September 2014 school forum meeting, the schools forum agreed to a maximum of £100,000 and to the tapping method.

h) Lump Sum

This is an optional factor where each school will receive a maximum amount up to £175,000. The lump sum amounts may be different for primary and secondary schools or academies.

In 2015-16 this was £112,000 and in 2014-15 this was £111,200 – the maximum amount which could be awarded.

i) Split Sites

This is an optional factor which designed to help support schools which are located on separate sites. Schools sharing facilities, federated schools and schools with remote sixth forms are NOT eligible for split site funding.

j) Rates

This is an optional factor which funds a school or academy based on their estimated rates bills for the coming year. Medway also adjust the rates funding to account for any over or under funding of rates from the previous years when the rates bills are known.

k) Exceptional Premises Factors

This is an optional factor which LA's can apply to the EFA to use exceptional factors relating to premises and must be more than 1% of the schools budget and applies to fewer than 5% of Medway schools and academies.

In Medway we have two EFA approved exceptional factors, firstly listed building and secondly Amalgamated Schools/academies.

4.3 As well as the 11 factors above the funding formula must also:

- i) distribute 80% of the SB funding through pupil led factors – i.e. sections A- F above.

- ii) Ensure the government's pre-16 minimum funding guarantee (MFG) for mainstream schools is kept. The MFG is set at -1.5% per pupil for 2016-2017.

- 4.4 As the government has set the MFG at minus 1.5%; for the past three years the schools forum have agreed to fund this by capping gains per pupil at 1.5% also.
- 4.5 Due to the pressures on the high needs block of the LA the schools forum has also agreed for the past few years to transfer £2m from the SB to the HN block.
- 4.6 The indicative funding calculation and unit costs for 2016 – to 2017 can be seen in appendix 2.

5. Decisions for Schools' Forum:

- 5.1 The LA is asking schools forum to:
 - a) **Note** this information.
 - b) **decide** wheatear to continue to cap the gains per pupil for 2016-17?
 - c) if So to continue with the same 1.5% arrangement as in previous years or to use a different amount and or method of funding cap
 - d) **decide** wheatear to keep the same sum and method for 2016 – 17 for the sparsity factor?
 - e) if No then what sum and method would they like to use?
 - f) **decide** wheatear to award the maximum lump sum of £175,000 for the lump sum factor?
 - g) If no, what sum would they like to award?
 - h) agree to transfer £2m of school block funding to the high needs block the same as last year?

Please see voting matrix. All school members are eligible to vote.

6. Next Steps

- 6.1 The DFE has issued data to LA's in July in order for the LA to model the 2016-17 funding formula. The LA will now model the funding formula for 2016-17 and consult with all schools and academies and report back at the next schools forum.

Report Author

Maria Beaney

Finance Business Partner Education & Schools

School/Academy Funding Formula 2016-17 Timetable

Jul 15	Information from DFE to LA
7 th Sep 15	Schools Forum Meeting
9 th Sep 15	LA to model & consult with schools/academies
23 rd Sep15	Deadline for schools/academies consultation
30 th Sep15	Deadline for submitting EFA changes requests.
1 st Oct15	Census Day
5 th Oct 15	Schools Forum Meeting – Schools Forum & LA to decide & approve Provisional 16-17 funding formula.
27 th Oct 15	Council Cabinet Approval of Provisional 2016-17 funding formula
Oct./Nov.15	DFE/LA (Management Information Team) validation of School Census
30 th Oct 15	LA to submit Provisional Funding Formula Return (called the APT) to EFA
26 th Nov.15	School Census Data closed by DFE
Mid-Dec.15	School Census Data available
10 Dec.15	DFE issues Final Funding Formula Return (APT) to LAs, with updated School Census (Oct.15) data LA able to estimate Schools Block – Dedicated Schools Grant allocation for 16-17
w/c 14 th .Dec.15	Schools Block – Dedicated Schools Grant 16-17 published by DFE, excl. academy recoupment.
31 st Dec 15	Deadline for submitting final exception EFA changes requests.
13th Jan 16	Schools Forum Meeting – Schools Forum & LA to decide & approve Final 16-17 funding formula.
21 th .Jan.16	Final Funding Formula Return (APT) to be submitted to EFA
9 th Feb 16	Council Cabinet Approval for Final 2016-17 funding formula
29 th .Feb.16	Schools to be informed of Schools Block allocation 16-17 by LA
31 st .Mar.16	EFA informs academies of GAG, if academy open as at 11 th .Jan.16

Indicative Funding Calculations

Pupil Led Factors

1) Basic Entitlement Age Weighted Pupil Unit (AWPU)	Description	Amount per pupil	
	Primary (Years R-6)	£2,751.94	
	Key Stage 3 (Years 7-9)	£4,120.72	
	Key Stage 4 (Years 10-11)	£3,000.00	
	Description	Primary amount per pupil	Secondary amount per pupil
2) Deprivation	FSM % Primary	£412.84	
	IDACI Band 1	£50.11	£195.42
	IDACI Band 2	£75.17	£295.75
	IDACI Band 3	£154.90	£468.78
	IDACI Band 4	£470.17	£1,825.71
	IDACI Band 5	£746.77	£2,697.14
	IDACI Band 6	£796.14	£3,000.00
3) Looked After Children (LAC)	LAC X March 15	£770.21	
4) English as an Additional Language (EAL)	EAL 3 Primary	£176.93	
	EAL 3 Secondary		£526.95
5) Mobility	Pupils starting school outside of normal entry dates	£1,171.98	£1,200.00
	Description	Weighting	Amount per pupil
6) Prior attainment	N/A	35.82%	£2,498.50
	Low Attainment % old FSP 73		
	Secondary pupils not achieving (KS2 level 4 English or Maths)		£1,061.70
7) Lump Sum			
8) Sparsity factor			
Total Funding for Schools Block Formula (excluding MFG Funding Total) (£)			

*These funding rates are indicative and subject to change depending on the modelling and any factors not yet decided (such as the sparsity factor) by the schools forum.

Agenda Item 6: Schools' Forum Elections

1. Primary Maintained Schools

To be elected	2 headteachers
Current representatives	Liz Caldwell, Kim Parnell
Proposal	New representatives to be elected through process determined by Chairs of Primary Consortia

2. Academies

Guidance: Schools' Forum: Operational and good practice guidance (March 2015)	'There are three sub-groups for academy members: mainstream academies, special academies and alternative provision academies and it is for the proprietors of academies within each of these subgroups to elect their representatives. It is not appropriate, therefore, for headteacher phase groups to determine representation unless the academy proprietors have agreed and even then the voting would need to exclude maintained school representatives. There is no requirement for academies members to be split into primary and secondary subgroups. However, local authorities may wish to encourage academies to consider the pupil proportions across all academies when electing their representatives.
Considerations	The guidance set out above indicates that the Academy group should elect a special school academy representative. Schools' Forum has previously agreed that the number of primary academies is at a sufficient level for there to be a primary academy representative
To be elected	4 representatives (Currently 1 primary academy headteacher, 2 secondary academy headteachers, 1 secondary academy headteacher or governor)
Current representatives	Primary academy headteacher: Karen White Secondary academy headteachers: Simon Decker, Kim Gunn Secondary academy headteacher or governor: Judy Rider
Proposal	The process could potentially become quite cumbersome so in order to support simplification of the process it is suggested that: <ul style="list-style-type: none"> • The primary academy representation remains and

	<p>the Chairs of Primary Consortia support the election of the primary academy representative. This will be done in liaison with primary academy headteachers and the primary academy proprietors through the Chairs of Primary Consortia.</p> <ul style="list-style-type: none"> • The 2 secondary academy headteacher representatives are elected by the secondary academy headteachers and the academy proprietors • The 1 secondary academy headteacher or governor becomes the special school academy headteacher or governor representative and is elected by the special school academies and their proprietors.
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3. Pupil Referral Units

To be elected	1 representative
Current representative	Karen Bennett
Proposal	It is proposed that the pupil referral unit representative is elected by the leaders of the pupil referral units.

4. 16-19 Providers

To be elected	1 representative
Current representative	Jane Spurgin (now retired)
Proposal	It is proposed that the election is agreed between the representatives of the eligible 16-19 organisations

Schools' Forum are asked to note and agree the proposals