

Public Document Pack



Schools Forum

**Tuesday, 19 March 2013 5.00 p.m.
Civic Suite, Town Hall, Runcorn**

A handwritten signature in blue ink, appearing to read 'David W R', positioned above a grey rectangular stamp.

Chief Executive

COMMITTEE MEMBERSHIP

*Please contact Ann Jones - Tel: 0151 511 8276 or email:
ann.jones@halton.gov.uk for further information.*

The next meeting of the Committee is on Tuesday, 18 June 2013

**ITEMS TO BE DEALT WITH
IN THE PRESENCE OF THE PRESS AND PUBLIC**

Part I

Item No.	Page No.
1. APOLOGIES FOR ABSENCE	
2. MINUTES & MATTERS ARISING	1 - 9
3. FUNDING FORMULA FOR EARLY YEARS PROVISION 2013-14	10 - 12
4. HIGH NEEDS BLOCK TOP UP RATES	13 - 15
5. PUPIL REFERRAL UNITS	16 - 17
6. SCHOOL BUDGETS	18 - 20
7. CONTINGENCY	21 - 22
8. ANY OTHER BUSINESS	

In accordance with the Health and Safety at Work Act the Council is required to notify those attending meetings of the fire evacuation procedures. A copy has previously been circulated to Members and instructions are located in all rooms within the Civic block.

SCHOOLS FORUM

At a meeting of the Schools Forum on Tuesday, 29 January 2013 at Civic Suite, Town Hall, Runcorn

Present: E. Cargill, Primary School Representative
 Councillor Philbin, Executive Board Member Portfolio Holder for Children, Young People & Families
 J Woodroffe, Secondary School Representative - Chairman
 L Bowles, Nursery Schools Representative
 J Coughlan, Primary School Representative
 C Dawes, Primary School Representative
 A Keeley, Secondary School Representative
 D Stanley, All Through School Representative
 L Feakes, Primary School Representative
 J. Rigby, Secondary Academy Representative
 S Broxton, Primary Representative
 H Mullaney, Secondary Academy Representative
 S. Clough, Children & Enterprise
 A. McIntyre, Children & Enterprise
 A Jones, Financial Management
 A. Jones, Democratic Services

Action

SCF25 APOLOGIES FOR ABSENCE

It was noted that apologies had been received from Carole Owen, Dianne Moran, Marjorie Constantine and Paul Towey.

SCF26 MINUTES & MATTERS ARISING

The minutes of the previous meeting held on 16 October 2012 were agreed as a correct record.

SCF27 MEMBERSHIP & ROLE OF SCHOOLS FORUM UPDATE

The Forum was provided with an update on the membership and role of the Schools Forum following the introduction of the Schools Forum (England) Regulations 2012.

It was explained that each authority was able to determine the size of their Schools Forum provided it allowed full representation for the different types of schools and for representation of non-school members. Schools and Academy members together must number at least two thirds of the total membership of the Schools Forum. The balance between primary, secondary and academies members must be broadly proportionate to the pupils in each category.

The Forum was advised that membership of the Halton School Forum had now been revised and agreed in line with the above requirements and was attached to the report at Appendix 1.

In addition, it was noted that in line with the new regulations, Schools Forum was expected to ensure that the Executive Board were aware of its views on specific issues such as schools budget and individual budget shares. It was agreed therefore, that the Executive Board Portfolio Holder for Children's Services, Councillor Ged Philbin, be invited to contribute to the Forum. Councillor Philbin was in attendance at the meeting and was welcomed to the Forum by the Chairman on behalf of all members.

It was confirmed that as the Schools Forum was both a consultative and decision making body for certain proposals on the use of public money at a local level, it was now a public meeting and as such all agendas and minutes would be published on the Council website.

For information, a table showing the revised powers and responsibilities of the Schools Forum was attached at Appendix 2.

RESOLVED:

1. The revised membership of the Schools Forum is noted; and
2. The revised role of the Schools Forum is noted.

SCF28 DSG SETTLEMENT 2013-14

The Forum was advised of the final allocation of the Dedicated Schools Grant (DSG) settlement for 2013-14, following the Department for Education's (DfE) announcement on 19 December 2012.

It was noted that the 2013-14 settlement marked the first step towards a national funding formula and the DfE would continue to refine the arrangements so that the Forum was better placed to move to a new national funding formula during the next spending review period.

It was noted that historically the announcement included the number of pupils, the Guaranteed Unit of Funding per pupil and the total cash value. For 2013-14 however, in line with the new funding regulations, the pupil numbers were split between the Schools Block (16,823) and

Early Years Block (1,185) and the High Needs Block (no pupil numbers). The funding therefore was allocated as follows:

- Schools Block: £81,718,000
- Early Years Block: £ 3,986,000
- High Needs Block: £13,505,000

It was reported that the total DSG settlement for 2013-14 was £101,282,000. This included £2,072,000 for:

- 2 year olds early education places - £1,930,000;
- Transition funding for the ending of the 90% funding floor protection for 3 and 4 year olds - £117,000; and
- Funding for the induction of Newly Qualified Teachers (NQT's) - £26,000.

RESOLVED: That School Forum notes the DSG settlement for 2013 -14.

SCF29 SCHOOLS BLOCK: SCHOOLS FUNDING FORMULA UPDATE

The Forum received the final funding formula for primary and secondary phases for 2013-14.

Further to decisions made at the last Schools Forum meeting regarding how the new school funding requirements would be adopted for Halton's Primary and Secondary maintained schools, academies and free school, the pro forma and supporting spreadsheet were completed and submitted to the Education Funding Agency (EFA).

It was reported that a response was received from them on 15 November 2012 stating that they were happy with the formula after 'reasonableness checks' but wanted further information on the PFI factor, the Pupil Growth Fund and contingency monies not delegated (held for the proposed Pupil Growth Fund). Further information was subsequently submitted and was accepted on 27 November 2012.

The DSG settlement allocated £81,718,000 to the Schools Block for Halton which covered the main funding for Primary and Secondary phase establishments. By uplifting the 2012-13 DSG cash value to the 2013-14 pupil numbers, there was a cash total of £38,839,800 available for Primary schools and £40,414,920 available for Secondary schools.

Budgets funded by the Schools Block had now been calculated were presented to Members so the final funding formula cash values could be reviewed and approved. (It was noted that although the final funding formula had to be submitted to the EFA by 22 January 2013, prior to the Schools Forum meeting, it was still subject to Schools Forum approval).

Members agreed to approve the final funding formula cash values. It was noted that once approval had been given by the EFA, the Schools Block budgets would be distributed to primary and secondary schools.

RESOLVED: That

1. Progress in developing the funding formula for primary and secondary phases be noted; and
2. The final funding formula for primary and secondary phases be approved.

SCF30 SCHOOLS BLOCK: PUPIL GROWTH FUND

The Forum received a report informing them of the decisions required for the new Pupil Growth Fund as per the Department of Education (DfE) requirements. Agreement was also sought on the criteria and calculation to be used for 2013-14.

Members were reminded that at the October meeting it was agreed to centrally retain a contingency fund for the purpose of meeting pupil growth. Consideration was now needed of the criteria for such funding and the basis of allocating monies to qualifying schools in accordance with the guidance set out by the DfE.

The report provided information and points for Forum members to take into consideration when reaching their decisions.

During debate the following was noted:

- Clarification was provided over the loss of the funding factor for 'ghost funding' and how the pupil growth fund would be used in its place;
- Pupil admissions resulting from schools appeals were discussed. Members of Appeals Panels would need advising of the changes to funding arrangements;

- Clarification would be sent out to schools on the infant class size exceptions;
- Pupil Growth Funding was available for all types of schools and pupils within the primary and secondary phases;
- Although it was no longer required for schools to declare their excess balances, this would be requested from a school if an application was made to the Pupil Growth Fund;
- It was agreed that applications to the Pupil Growth Fund would be made using a pro forma which would include information such as: the number of pupils; circumstances of the request; and the excess balance of the school.

It was the consensus of the Forum that a Pupil Growth Fund should continue to be supported, subject to a review in 12 months' time and the implementation of the pro forma as mentioned above.

RESOLVED: That Schools Forum:

1. Supports the Pupil Growth Fund for the next 12 months in line with the criteria set out in the report;
2. Reviews the Fund in 12 months' time; and
3. Agrees to the implementation of a pro forma to be used for the application process.

SCF31 PUPIL PREMIUM GRANT

A report was presented which informed the Schools Forum of the final allocation of Pupil Premium Grant for 2012-13 and the indicative allocations for 2013-14.

Officers provided a recap of the pupil eligibility and rates payable for 2012-13. The Grant for 2013-14 had been announced at the following rates:

FSM Ever 6	£900
Children Looked After	£900
Service Children Ever 3	£300

It was noted that the final allocations of Pupil Premium Grant for 2013-14 would be based on the January 2013 census and would be verified in the summer.

RESOLVED: That the Schools Forum note the report.

SCF32 FUNDING FOR HIGH NEEDS PUPILS & STUDENTS UPDATE

The Forum was presented with a summary of the progress to date in implementing new assessment and funding models for high needs pupils and students.

A report was presented to the Schools Forum on 16 October 2012 which provided a summary of the changes to funding provision for pupils and students with high needs. It was noted that for schools these changes would take effect from 1 April 2013 and for colleges and academies they would be introduced at the start of the academic year 2013-14. It was reported that task and finish groups had been established to address the different areas within the high needs blocks. Although in many areas further work was still required, a summary of progress to date was detailed in the report. Officers explained the funding model to Forum members, as discussed in paragraph 3.6 of the report. Attached at Appendix 1 was the proposed funding model for special units for 2013-14 which was endorsed by the Forum.

It was agreed that a further report would be brought to the next meeting of the Schools Forum.

RESOLVED: That Schools Forum:

1. Notes the progress to date;
2. Requests a further report; and
3. Agrees the funding model for special units for 2013-14.

SCF33 FUNDING FOR EARLY EDUCATION FOR 2 YEAR OLDS FROM LOWER INCOME HOUSEHOLDS

The Forum received a report informing them of the expansion of the free entitlement to Early Education for eligible two year olds and the decisions required to allow the local authority to meet its statutory duty.

The Forum was advised that currently Halton provided funding from the Early Intervention Grant (EIG) to provide a free entitlement to Early Education to approximately 125 children for up to 10 hours per week.

It was announced in May 2012, that funding for early education for two year olds would form part of the DSG from 2013-14. This reflected the fact that early education would become a statutory entitlement for around 20% of eligible two year olds from September 2013, in the same way as it was for three and four year olds.

The report went on to discuss the allocation of the funding in three separately identified strands: Statutory Place Funding, Trajectory funding and Capital Funding. Further it discussed how the allocations were calculated to achieve an average rate.

RESOLVED: That Schools Forum:

1. Notes the report;
2. Agrees funding to allow the local authority to meet its statutory duty in line with DSG regulations; and
3. Agrees to pay flat rate of £4.95 per hour.

SCF34 EARLY YEARS UPDATE

The Schools Forum was informed of the new School Funding Formula requirements under the new funding arrangements, which affected the Early Years provision for 2013-14. The Early Years formula was based upon the agreed formula for Primary Schools.

It was explained that the basis of the allocation for each element was identified and mapped to the new funding factors as mentioned in the report. The funding had been mapped and the total cash value for each element retained within that element. The elements being used were outlined by officers and were:

- Basic Per Pupil Element;
- Deprivation Element;
- Lump Sum; and
- LA rates.

It was noted that consultation events had been set up for Tuesday 5 February for Nursery Schools / Nursery Units and Thursday 7 February for PVI providers.

RESOLVED: That the report be noted.

SCF35 CONTINGENCY UPDATE

The Forum received an update on the value of the contingencies for 2012-13.

The total general contingency was £605,139 which included £166,248 carried forward from 2011-12. The Forum was reminded that the following budget adjustments to this contingency budget had been agreed:

Staffing reductions:	£300,000
Carbon reduction commitments:	£80,809
Contribution to IWIST staffing:	£50,000
Delegated former Standard Fund:	£267,957
Infant Class Size funding:	£57,705
Pupil growth The Bankfield:	£33,619

It was noted that this was £189,951 above budget but this could be covered by the balance from the staffing reduction and NQT budgets. Further information on the budget adjustments were explained in detail in the report. It was noted that the revised balance on the general school contingency (paragraph 3.4) should read £26,180, **not** £29,180 as mentioned in the report.

Schools Forum was asked to note that following a brief consultation by the DfE on the Local Authority Central Spend Equivalent Grant (LACSEG) from 2012-13, any school converting to an academy would take a proportion of the school contingency budget. This funding would be recouped from the budget in year.

RESOLVED: That Schools Forum note the current balance for the contingency.

SCF36 FINANCE SLA'S

The Forum was informed of two proposals for new Service Level Agreements (SLA's) to be offered from April 2013 and was requested to agree the proposals so that they could be costed and worked up for the next meeting.

The Financial Management Division currently operated a Maternity Scheme whereby schools that opted into the scheme shared the cost of maternity leave between them on a pro-rata basis of their total LMS budgets. It was agreed to explore continuing with the scheme if sufficient numbers of schools opted in. There were currently six schools that had opted out of the scheme for 2012-13. The more that opted out the higher the charge would be for the

remaining schools. The Forum was advised that the cost of servicing this scheme would be explored; however the estimates were that this may work out at less than £10 per school for the year.

The Financial Management Division were also willing to offer SLA's to schools from April 2013 to act as a recoupment body to calculate and invoice other LA's for income and to pass monies to schools on a termly basis. Halton were also considering operating recoupment on a similar basis as the Early Years Single Funding Formula.

RESOLVED: That Schools Forum:

1. Note the report; and
2. Agrees to the proposals for the SLA's to be costed and worked up.

SCF37 ANY OTHER BUSINESS

The Forum Members wished to express their thanks to Ann McIntyre and Anne Jones for their support during the School Funding Reform process.

Meeting ended at 7.12 p.m.

REPORT TO: School Forum

DATE: 19th March 2013

REPORTING OFFICER: Senior Finance Officer

SUBJECT: School Funding Reform – Early Years
2013-14

WARDS: Boroughwide

1.0 PURPOSE OF THE REPORT

1.1 To inform School Forum of the Early Years proposals for 2013-14.

2.0 RECOMMENDATION: That

- (1) That School Forum agrees the mapping of current funding factors to the most appropriate funding factor**
- (2) That School Forum agrees that funding is kept as much as possible within each funding factor**
- (3) That School Forum agree the use of a Lump Sum funding factor for the Maintained Sector Nursery Schools and Nursery Units**
- (4) That School Forum agree that the Lump Sum funding factor will not be used for the Private, Voluntary and Independent Sector**
- (5) That School Forum agrees to fund the previously agreed Private Finance Initiative costs at The Grange.**

3.0 SUPPORTING INFORMATION

- 3.1 As reported to the last School Forum consultation events took place on 5th and 7th February with representatives from maintained nursery schools/units and the private, voluntary and independent sector providers.
- 3.2 For the maintained sector the results of the consultation showed support for the proposed funding factors of Basic Per Pupil, Deprivation, Lump Sum and Local Authority Rates.
- 3.3 The nursery schools were given a number of options regarding a cash balance to be allocated through a funding factor. All three nursery schools opted for the cash balance to be allocated through the Basic Per Pupil element and this has been adjusted accordingly.
- 3.4 Appendix A details the proposed funding formula with cash values for the maintained nursery schools and nursery units plus the indicative budgets for 2013-14 should such proposals be agreed by School Forum.

- 3.5 The Private, Voluntary and Independent (PVI) sector consultation results again showed support for the proposed funding factors of Basic Per Pupil, Deprivation and Local Authority Rates.
- 3.6 Within the PVI sector the use of a lump sum caused increased turbulence of funding between providers. By modelling various options we were able to prove that the lowest level of turbulence was provided by not using the lump sum factor but by allocating that cash funding through the Basic Per Pupil factor.
- 3.7 Headcount figures for the PVI sector were received at the end of February and their indicative budgets will be calculated.

4.0 LIST OF BACKGROUND PAPERS UNDER SECTION 100D OF THE LOCAL GOVERNMENT ACT 1972

Document	Place of Inspection	Contact Officer
School Funding Reform: Arrangements for 2013-14	Kingsway House	Anne Jones

Early Years Block Funding Formula - Halton 2013-14

Factor	Nursery Schools	Nursery Units
Basic Per Pupil	4,319.00	2807.6
Deprivation IDACI	212.00	71.77
Looked After Children	N/A	N/A
LPA	N/A	N/A
EAL	N/A	N/A
Pupil Mobility	N/A	N/A
Lump Sum	51,250.67	1091
Split Sites	N/A	
Rates	Actual	N/A
PFI	N/A	190.58
London Fringe	N/A	N/A
Post 16	N/A	N/A

Summary of Nursery School Funding 2013-14

	Ditton	Birchfield	Warrington Rd	Total
Basic Per Pupil	221,305.56	310,968.00	280,389.48	812,663.04
Deprivation	15,772.80	7,123.20	13,737.60	36,633.60
Lump Sum	51,250.67	51,250.67	51,250.67	153,752.01
LA Rates	15,896.25	2,826.00	15,896.25	34,618.50
Total excl MFG	304,225.28	372,167.87	361,274.00	1,037,667.15
MFG	-	-	-	-
Total incl MFG	304,225.00	372,168.00	361,274.00	1,037,667.00
2012-13 cash budget adjusted for pupil number change				<i>1,037,668.93</i>
variance				1.93

Summary of Nursery Unit Funding 2013-14

	Per Pupil	IDACI	Lump Sum	PFI	Total excl MFG	MFG	TOTAL NURSERY UNIT
St Marys	55,590.48	5,382.75	1,091.00	-	62,064.23	3,465.83	65,530.00
Castleview	32,006.64	4,650.70	1,091.00	-	37,748.34	1,995.49	39,744.00
Astmoor	25,268.40	3,746.39	1,091.00	-	30,105.79	1,575.38	31,681.00
the Park	42,114.00	6,157.87	1,091.00	-	49,362.87	2,625.64	51,989.00
Palacefields	32,006.64	3,531.08	1,091.00	-	36,628.72	1,995.48	38,624.00
Hallwood Pk	40,429.44	5,727.25	1,091.00	-	47,247.69	2,520.61	49,768.00
Brookvale	40,429.44	4,779.88	1,091.00	-	46,300.32	2,520.61	48,821.00
St Gerards	53,905.92	7,191.35	1,091.00	-	62,188.27	3,360.82	65,549.00
Simms Cross	40,429.44	4,822.94	1,091.00	-	46,343.38	2,520.61	48,864.00
West Bank	48,852.24	6,071.74	1,091.00	-	56,014.98	3,045.74	59,061.00
Oakfield	84,228.00	8,052.59	1,091.00	-	93,371.59	-	93,372.00
The Grange	167,344.32	7,535.85	1,091.00	7,432.62	183,403.79	-	183,404.00
Total	662,604.96	67,650.40	13,092.00	7,432.62	750,779.98	25,626.22	776,407.00

REPORT: School Forum

DATE: 19 March 2013

REPORTING OFFICER: Operational Director – Children’s Organisation and Provision

SUBJECT: High Needs Pupils and Students

WARDS: Borough-wide

1.0 PURPOSE OF REPORT

- 1 This report provides an update on the work undertaken on developing the processes and funding for high needs pupils and students. It also outlines the consultation arrangements and next steps required.

2.0 RECOMMENDED:

- 2.1 The progress to date is noted;
- 2.2 School Forum note that a further update report will be circulated prior to the meeting on 19th March 2013.

3.0 BACKGROUND

- 3.1 Two funding options have now been developed for the arrangements for top up funding for the four special schools. Both models are based on 2012/2013 cash budgets and 2013/2014 estimated numbers. The first model shows a single top up rate for each category of need in each school. Although the same ratios are used, as the costs and numbers for each school differ the top up level differs between each schools. The proposed top up levels are as follows:

Option 1	Ashley	Chesnut Lodge	Brookfields	Cavendish
Communication & Interaction (CI)	8186.53	14075.70	11538.34	15201.65
Learning & Cognition (LC)	3654.70	6283.79	5151.05	6786.45
Behaviour, Emotional & Social Development (BESD)	5869.45	10091.77	8272.58	10899.04
Sensory &/or Physical Needs (SPN)	6874.50	11819.82	n/a	n/a

- 3.3 The second option bands the top up into two categories so that allowance is made for pupils who need one to one support. To fund within the current resources the top up allocated for those pupils identified in category one has been reduced.

Ashley School

CI pupils Level 1	6,998.05
CI pupils Level 2	28,268.05
LC pupils Level 1	3,124.13
LC pupils Level 2	24,394.13
BESD pupils Level 1	5,017.35
BESD pupils Level 2	26,287.35
SPN pupils Level 1	5,876.49
SPN pupils Level 2	27,146.49

Chesnut Lodge School

CI pupils Level 1	7,823.59
CI pupils Level 2	29,093.59
LC pupils Level 1	3,492.68
LC pupils Level 2	24,762.68
BESD pupils Level 1	5,609.24
BESD pupils Level 2	26,879.24
SPN pupils Level 1	6,569.72
SPN pupils Level 2	27,839.72

Brookfields

CI pupils Level 1	5,995.33
CI pupils Level 2	27,265.33
LC pupils Level 1	2,676.49
LC pupils Level 2	23,946.49
BESD pupils Level 1	4,298.44
BESD pupils Level 2	25,568.44
SPN pupils Level 1	n/a
SPN pupils Level 2	n/a

Cavendish

CI pupils Level 1	10,019.48
CI pupils Level 2	31,289.48
LC pupils Level 1	4,472.98
LC pupils Level 2	25,742.98
BESD pupils Level 1	7,183.61
BESD pupils Level 2	28,453.61
SPN pupils Level 1	n/a
SPN pupils Level 2	n/a

- 3.4 The four special schools have been consulted on the two funding options. The outcome of this consultation will be shared with the School Forum in the second report to be circulated before the meeting on 19th March 2013.

4.0 HIGH NEEDS ASSESSMENT

- 4.1 As reported at previous School Forum meetings a task group has met on a number of occasions to consider the changes required to the high needs assessment process. The aim of the funding reform is to “align pre-16 and post-16 needs funding more closely”. The place- plus approach is intended to achieve a greater degree of alignment such that high needs funding is arranged on the basis of a single set of principles across the 0-5 age-range.

- 4.2 The task group has therefore developed a High Needs Pupil/Student Assessment Process so that Halton has documented procedures to assess the needs of all pupils/students with high needs from 0-25 years old for the year 2013-14.

- 4.3 The document outlines the statutory duties, funding reforms, definition of high needs pupils and students, describes an overview of the three different funding elements, the principles of future funding for element 3 of the top up funding, describes the graduated approach, transition to post-16 and describes the assessment processes and panels.

- 4.4 The current banding criteria has now been adapted in line with the higher levels of delegation to schools and to ensure consistency up to 25. In addition, a flow chart has been produced which provides an overview of the assessment process. These three documents will be finalised at the next meeting on 7th March 2013 and shared with the SEN Working Group at its meeting on 12th March 2013. These documents will then be circulated to School Forum prior to the meeting on 19th March 2013.

5.0 LIST OF BACKGROUND PAPERS UNDER SECTION 100D OF THE LOCAL GOVERNMENT ACT 1972

Document	Place of Inspection	Contact Officer
School Funding Reform Arrangements 2013/2014	DFE website	Ann McIntyre – Operational Director – Children’s Organisation and Provision & Ed Dawson – Operational Director- Financial Services

REPORT TO: School Forum

DATE: 19 March 2013

REPORTING OFFICER: Operational Director – Children’s Organisation and Provision

SUBJECT: Pupil Referral Unit Funding

1.0 PURPOSE OF REPORT

1.1 This report provides a summary of the changes to the funding of pupil referral provision and seeks approval to carry forward any underspend from 2012/2013 into 2013/2014.

2.0 RECOMMENDED: That

2.1 School Forum note the delegation arrangements from April 2013;

2.2 Request an update on the top up rates at the meeting on 19th March; and

2.3 Approve the carryforward of any unspent PRU balances within the DSG from 2012/2013 to 2013/2014.

3.0 BACKGROUND

3.1 As part of the funding reforms the Local Authority is required to put in place arrangements for PRUs to have delegated budgets by April 2013. This is to allow Management Committees to have the delegated powers necessary to run PRUs.

3.2 Currently both PRUs are funded from the centrally retained element of the Dedicated Schools Budget. In 2012/2013 the Key Stage 4 PRU budget was £649,000 and the Key Stage 3 PRU budget was £470,000.

3.3 Under the new funding arrangements PRUs will be funded from the high needs element of the Dedicated Schools Budget. They will receive base funding of £8,000 for the number of places agreed with the Authority in August 2012. The place numbers agreed for the Key Stage 4 PRU is 40 – this gives a base budget of £320,000 and the numbers agreed for Key Stage 3 provision is 20 giving a base budget of £160,000.

3.4 Work is currently being finalised on the top up rates for both PRUs from April 2013. Top up funding will follow the real time movements of the pupils and will differ dependent on the students needs. The final top up rates will be circulated to the School Forum prior to the meeting on 19th March 2013.

3.5 As the PRUs do not currently have a delegated budget in 2012/2013 there will be no minimum funding guarantee. However, as the new funding

arrangements are likely to impact on the current funding levels and could cause some uncertainty for 2013/2014 School Forum are requested to agree that any underspend on the two PRU budgets for 2012/2013 is carried forward and used to support the provision in 2013/2014.

- 3.6 For pupils excluded from mainstream schools the current arrangements will continue with schools paying back the relevant AWPU along with the £9,000 charge.
- 3.7 Under the funding reforms where early intervention is provided at either of the PRUs but the pupil remains on the mainstream on the school roll in 2013/2014 this provision will continue to be offered at no costs to the mainstream school. This is a temporary arrangement agreed with the EFA for one year only. From 2014/2015 the relevant proportion of the high needs budget will be delegated the schools who will then be responsible for paying the top up element direct to the PRU.

4.0 LIST OF BACKGROUND PAPERS UNDER SECTION 100D OF THE LOCAL GOVERNMENT ACT 1972

Document	Place of Inspection	Contact Officer
School Funding Reform Arrangements 2013/2014	DFE website	Ann McIntyre – Operational Director – Children’s Organisation and Provision

REPORT TO: School Forum

DATE: 19th March 2013

REPORTING OFFICER: Senior Finance Officer

SUBJECT: School Funding Reform –One Line Budgets for Primary and Secondary phases

WARDS: Boroughwide

1.0 PURPOSE OF THE REPORT

1.1 To inform School Forum of the Schools Block One Line Budgets for Primary and Secondary phases for 2013-14.

2.0 RECOMMENDATION: That the report be noted.

3.0 SUPPORTING INFORMATION

3.1 At the last School Forum the final funding formula cash values were agreed for the Primary and Secondary phases from the Schools Block of the Dedicated Schools Grant.

3.2 Indicative Schools Block One Line Budgets were distributed to Head Teachers on 31st January. These figures were subject to final approval from the Education Funding Agency which was received on 28th February 2013. Head Teachers were contacted and informed that their indicative budget figures were confirmed.

3.3 Appendix A shows the final Schools Block Budgets plus indicative Special Unit and Nursery Unit budgets.

4.0 LIST OF BACKGROUND PAPERS UNDER SECTION 100D OF THE LOCAL GOVERNMENT ACT 1972

Document	Place of Inspection	Contact Officer
School Funding Reform: Arrangements for 2013-14	Kingsway House	Anne Jones

Summary of Primary School Funding 2013-14

School	Schools Block	Early Years Block	High Needs Block	Total
St Marys	871,400	65,530		936,930
St Edwards	524,169			524,169
Weston Pt	543,094		90,783	633,877
Victoria Rd	876,880			876,880
Weston	537,353			537,353
St Clements	746,131			746,131
Westfield	657,781		86,056	743,837
Halton Lodge	819,643			819,643
Castleview	662,642	39,744		702,386
Astmoor	674,951	31,681		706,632
The Brow	734,641		187,639	922,280
Woodside	743,683		91,012	834,695
Holy Spirit	523,165			523,165
The Park	553,793	51,989		605,782
Pewithall	725,322			725,322
Palacefields Academy	858,053	38,624	100,000	996,677
Hallwood Park	610,535	49,768		660,303
St Augustine	476,591			476,591
R All Saints	518,793			518,793
OLMOS	764,430			764,430
Hill View	746,574			746,574
Beechwood	551,626			551,626
Brookvale	1,014,129	48,821		1,062,950
St Martins	786,428			786,428
Murdishaw	767,087			767,087
Gorsewood	816,480			816,480
St Bertelines	988,996			988,996
Windmill Hill	643,006			643,006
Daresbury	446,374			446,374
Moore	684,980			684,980
Hale	529,985			529,985
St Bedes Juniors	825,038			825,038
St Bedes Infants	742,984			742,984
Spinney Avenue	739,013			739,013
St Michaels	913,814			913,814
Farnworth	1,194,183			1,194,183
Halebank	448,050			448,050
St Gerards	755,798	65,549		821,347
Ditton	1,213,713			1,213,713
Simms Cross	821,899	48,864	200,453	1,071,216
West Bank	756,961	59,061		816,022
Oakfield	1,140,749	93,372	191,069	1,425,190
Moorfield	936,734			936,734
OLOPS	718,701			718,701
St Basils	1,268,769			1,268,769
All Saints Upton	747,218			747,218
Fairfield Juniors	1,055,450			1,055,450

Fairfield Infants	935,577			935,577
Lunts Heath	920,887			920,887
St John Fisher	785,580			785,580
St Chads	5,347,038			5,347,038
The Grange	5,858,864	183,404	395,227	6,437,495
Ormiston Bolingbroke	3,930,208			3,930,208
The Heath	5,592,258			5,592,258
The Bankfield	4,104,682		107,319	4,212,001
Wade Deacon	7,834,124		90,092	7,924,216
Sts Peter & Paul	7,062,050		90,576	7,152,626
Sandymoor Free	262,061			262,061

NB The following are not included within the above figures:

- Outreach services
- Signer in HI Units
- Enhanced Provision
- Sixth Form
- Pupil Premium
- Additional Grant for Schools

REPORT TO: School Forum

DATE: 19 March 2013

REPORTING OFFICER: Operational Director – Children’s Organisation and Provision

SUBJECT: Contingency Update

1.0 PURPOSE OF REPORT

1.1 This report provides a summary of the requests from a number of schools for contingency funding. School Forum is asked to consider each of the requests and whether they wish to agree to support.

2.0 RECOMMENDED: That

- 2.1 School Forum consider the request for funding by Farnworth CE Primary School;**
- 2.2 School Forum consider the request for funding by West bank Primary School;**
- 2.3 School Forum note the decision on the request for funding by Cavendish School; and**
- 2.4 School Forum note that funding will be recouped from the budget in year for academies.**

3.0 BACKGROUND

- 3.1 The report to School Forum in January 2013 identified a balance of £24,180 on the general schools contingency budget in 2012/2013 and £1,785,881 on the DSG centrally held contingency.
- 3.2 The contingency can be used to support schools who have incurred exceptional unforeseen costs which it would be unreasonable to expect a governing body to meet. Two schools are seeking support under this criteria.
- 3.3 Following a Job Evaluation, Farnworth Church of England Primary School have now been advised that they must find the costs of a backdated job evaluation award of £14,000. This sum was neither budgeted nor expected by the school and they have insufficient funds to meet this additional cost. They are therefore seeking funding from the contingency to meet these additional backdated costs.

- 3.4 West bank primary school has had to pick up the costs of four hearings in the last twelve months. They are therefore seeking support towards the costs of note taking, venues and supply costs for the staff involved. A request has been made to School Forum for £9680.
- 3.5 The total of the above requests if £23,680 they can therefore be met if approved from the general schools contingency budget balance leaving £500.
- 3.6 A request was also received from Cavendish School to support the premature of retirement of a member of staff. As the school are not facing financial difficulties this request was not agreed and the school were advised as follows:

"In March 2011 School Forum confirmed the responsibility for retirement costs in Haltom Schools. At the meeting it was agreed that "premature retirement must be charged to the schools delegated budget". This is in line with the Education Act 2002 Section 37 paragraph 8.36. The School Forum could consider a case if it could be demonstrated by the local authority that the "revenue savings achieved by the termination of employment are equal or greater than the costs incurred." This tends to be the case when a school is in financial difficulty and must reduce staff or where an authority re-organisation takes place."

- 3.7 School Forum are asked to note that following a brief consultation by the Department of Education on the Local Authority Central Spend Equivalent Grant (LACSEG), from 2012/2013 any school converting to an academy will now take a proportion of the school contingency budget. This funding will funding will be recouped from the budget in-year.

4.0 LIST OF BACKGROUND PAPERS UNDER SECTION 100D OF THE LOCAL GOVERNMENT ACT 1972

Document	Place of Inspection	Contact Officer
E-mail on Westbank Primary	Rutland House	Ann McIntyre
E-mail on Farnworth CE Primary	Rutland House	Ann McIntyre
Letter from Cavendish	Rutland House	Ann McIntyre