



THE LONDON BOROUGH
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To: Members of the
SCHOOLS' FORUM

Colin Ashford	Primary Academy Governor
Anna Boshier	Non-School Representative (Catholic Church)
Geoff Boyd	Primary Maintained Governor
David Bridger	Non-School Representative (Church of England)
Angela Chapman	Primary Maintained Governor
Nick Cross	Secondary Academy Head Teacher
Andrew Downes	Secondary Academy Governor
Patrick Foley	Primary Maintained School Head Teacher
Aydin Önaç	Secondary Maintained Head Teacher
Sam Parrett	Non-School Representative (14-19 Partnership)
Neil Proudfoot	Non-School Representative (Joint Teacher Liaison Committee)
Matt Rampton	Primary Academy Head Teacher
Karen Raven	Secondary Academy Head Teacher
Alison Register	Non-School Representative (Early Years)
Keith Seed	Special Head Teacher/Governor
David Wilcox	Secondary Academy Governor
1 x vacancy	Primary Maintained School Head Teacher
1 x vacancy	Pupil Referral Unit Head Teacher/Governor

A meeting of the Schools' Forum will be held at the Bromley College of Further and Higher Education, Rookery Lane, Bromley, BR2 8HE on **THURSDAY 26 SEPTEMBER 2013 AT 4.30 PM** *

*** PLEASE NOTE STARTING TIME AND VENUE**

MARK BOWEN
Director of Corporate Services

A G E N D A

- 1 APPOINTMENT OF CHAIRMAN AND VICE-CHAIRMAN**
- 2 APOLOGIES FOR ABSENCE**
- 3 DECLARATIONS OF INTEREST**
- 4 MINUTES OF THE MEETING HELD ON 18TH JULY 2013 (Pages 3 - 6)**

- 5 **DSG USEAGE FOR EXPANSION OF GLEBE SCHOOL** (Pages 7 - 12)
- 6 **2013/14 DEDICATED SCHOOLS GRANT FINAL ALLOCATION** (Pages 13 - 18)
- 7 **OUTCOME OF CONSULTATION ON 2014/15 FUNDING REVIEW** (Pages 19 - 24)
 - a **SCHOOLS FORUM CIRCULAR 055-13 ALTERNATIVE PROPOSAL (KAREN RAVEN)** (Pages 25 - 26)

8 **ANY OTHER BUSINESS**

9 **DATE OF NEXT MEETING**

The venue for future meetings will be confirmed prior the meeting.

Thursday 21st November 2013

Thursday 23rd January 2014

Thursday 13th February 2014

Thursday 20th March 2014

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SCHOOLS' FORUM

Minutes of the meeting held at 4.30 pm on 18 July 2013

Present:

Andrew Downes (Chairman)	Secondary Academy Governor
David Bridger (Vice-Chairman)	Non-School Representative (Church of England)
Geoff Boyd	Primary Maintained Governor
Angela Chapman	Primary Maintained Governor
Keith Seed	Special Head Teacher/Governor

Also Present:

Councillor Stephen Wells	Portfolio Holder for Education
David Bradshaw	Head of Education and Care Services Finance
Amanda Russell	Head of Schools Finance Support
Helen Long	Democratic Services Officer

39 ELECTION OF CHAIRMAN AND VICE-CHAIRMAN

This item was deferred to the next meeting in September.

40 APOLOGIES FOR ABSENCE

Apologies for absence were received from Anna Boshier, Patrick Foley, Aydin Onac, Karen Raven and David Wilcox.

41 DECLARATIONS OF INTEREST

There were no declarations of interest.

42 MINUTES OF THE MEETING HELD ON 7TH MARCH 2013

RESOLVED that the minutes of the meeting held on 7th March 2013 be confirmed.

43 2014-15 REVENUE FUNDING ARRANGEMENTS

Report EDU13073

Further to Minute 37 of the last meeting, consideration was given to a report on additional guidance that had been issued by the DfE to assist local authorities and Schools Forums with planning the local implementation of the reformed funding system for 2014-15. The Head of the Schools Finance Team introduced the report and highlighted the nine main changes, the majority of which did not have a major impact on local arrangements. The DfE had also issued a new Authority Proforma Tool to allow the local authority to model funding for 2014/15 on a

school by school basis and the local authority was then required to submit a provisional 2014/15 school budget proforma by 31st October 2013.

The Forum went on to discuss the two main changes that would have an impact on local schools funding i.e. i) the upper limit for the lump sum which would be reduced to £175,000 in 2014/15; and ii) the change to the attainment measure for secondary schools to target pupils achieving level 3 or below in either English OR Maths as opposed to English AND Maths in 2013/14. Regarding the change to the lump sum in the case of primary schools this would mean a proposed reduction from the £180,000 to the capped amount. It was suggested that as no Secondary School representatives were present there would be discussion with Secondary Heads on this change and full consultation carried out with all secondary schools on proposed models based on a lump sum of either £175,000 in line with primary schools or no lump sum at all.

In respect of the second issue relating to the attainment measure this was more complicated and two papers were circulated at the meeting showing the percentage increases for schools and data comparisons. It was noted that for secondary schools in particular in terms of pupil numbers the new change would more than double the amount of pupils in 2014/15 attracting this funding and have considerable cost implications. It was proposed that more modelling be done to show the full impact and that discussions be held with Head Teachers about the approach to be taken. In order to deal with this within the time available it was proposed that a Working Group be set up to meet during the summer to draw up proposals which could be circulated early in the Autumn term. Arising from queries concerning the attainment measure change and whether it resulted in some pupils being counted twice the Head of Schools Finance advised that she had spoken to the DfE to clarify the matter and confirmed that this assumption was correct. The Chairman requested that the additional papers circulated at the meeting be emailed to all Forum members not present which the Officers undertook to do. It was also agreed that the Chairman and Vice-Chairman would be members of the Working Group.

RESOLVED that a Working Group be established to consider the above implications for schools to meet during the summer and develop proposals to come back to the Forum meeting in September.

44 CONSTITUTION OF THE SCHOOLS FORUM

Report EDU13072

The constitution of the Schools Forum was reviewed annually to reflect any changes that might have occurred in respect of member representation. The Head of Education, Care and Health Finance advised that there had been no further regulations affecting Schools Forums since last September and although there had been some changes to pupil numbers it was not sufficient to warrant amending the Constitution.

It was therefore proposed to retain the current membership within the academies and non schools areas and make no changes to the terms of reference. Members

noted, however, that it was likely there would be more significant changes in 2014.

RESOLVED that no changes be made to the Schools Forum Constitution and terms of reference.

45 SEND REFORMS, EHC PLANS AND THE LOCAL OFFER

A report was circulated at the meeting on the Government's new approach to special educational needs and disability which would require a new single assessment process to be put in place and an 'Education, Health and Care Plan' by 2014 to replace the current statutory SEN assessment and statement. The new Plans would provide for the same statutory protection to parents as a statement of SEN but would extend the age range for eligibility from birth to age 25 years. The intention was to give parents more control over the support for their child and family with the introduction of options for personal budgets.

The Acting Principal Educational Psychologist advised that the local authority and schools would be required to publish a local offer to clarify what support was available and from which source. To help with this officers would produce a template for schools which would be published on the Council's website. The report also highlighted other issues arising from these changes. In advance of the legislation plans would be introduced from 1st September 2013 for all new pupils who reached the threshold of specialist provision. A Local Authority 'Local Offer' would also be put in place to complement the school's 'Local Offer' and provide additional support for pupils below the threshold for an EHC Plan and above the notional £6,000 that was expected to meet needs which formed part of the mainstream schools and Academies delegated budgets.

Particular reference was made to the financial implications for the way that funding was delivered for Statements on SEN. From 1st April 2013 (maintained schools) and from 1st September 2013 (Academies) the first £6,000 funding for support of high incidence low level SEN needs would be delegated into school's budgets. The report detailed the changes and levels of funding that would be available and members were advised that a matrix system would be introduced to implement banded funding above the £6,000 limit. In response to a query on where any additional funding might come from it was explained that this would come out of the DSG and there could be an impact if a majority of pupils were put on the higher level.

It was noted that the local authority would continue to have responsibility for a child's health and social care needs in addition to educational needs. However, a significant change to the Bill had been included which placed a legal duty on Health Commissioners to arrange for health services that a local authority had specified in the EHC Plan.

RESOLVED that the report be noted and copies circulated to Forum members not present at the meeting.

46 ANY OTHER BUSINESS

The Chairman reported brief details of an email he had received from a parent of a pupil at a Primary School about the DfE current Primary School AWPU level compared to the Secondary level, which was highlighted by DfE during the funding review. He had referred the request to the Head of Schools Finance Team to provide a suitable response as there had already been similar questions from a reporter as well as several Freedom of Information requests. It was suggested that the parent be asked to submit these questions as a formal Freedom of Information request and that it would be dealt with accordingly.

47 DATE OF NEXT MEETING

The dates of the next meetings up until March 2014 were noted as follows:

Thursday 26th September 2013
Thursday 21st November 2013
Thursday 23rd January 2014
Thursday 13th February 2014
Thursday 20th March 2014

The Chairman requested that the dates for May and July 2014 also be provisionally agreed and the following were proposed:

Thursday 22nd May 2014
Thursday 10th July 2014

The Meeting ended at 5.30 pm

Chairman

Agenda Item 5

Report No.
ED13098

London Borough of Bromley

PART ONE - PUBLIC

Decision Maker: **SCHOOLS' FORUM**

Date: **Thursday 26 September 2013**

Decision Type: Non-Urgent Non-Executive Non-Key

Title: **DSG USAGE FOR EXPANSION OF GLEBE SCHOOL**

Contact Officer: Amanda Russell, Head of Schools Finance Support
Tel: 020 8313 4806 E-mail: Amanda.Russell@bromley.gov.uk

Chief Officer: Executive Director of Education, Care & Health Services

Ward: (All Wards);

1. Reason for report

This report outlines the progress of the planned expansion of Glebe School, with particular focus on the financial aspect.

2. **RECOMMENDATION(S)**

The Schools Forum is asked to note the content of the recent report to the Executive.

3. COMMENTARY

Attached at appendix 1 is a copy of the recent report that went to the Executive outlining the progress of the planned expansion of Glebe School. The Schools Forum is invited to discuss and note the content of this report, with particular regard to the financial implications at paragraph 5.

Report No.
ED13078

London Borough of Bromley

PART ONE - PUBLIC

Decision Maker: EXECUTIVE

Date: 11th September 2013

Decision Type: Non-Urgent Executive Key

Title: GLEBE FOUNDATION SPECIAL SCHOOL
(CAPITAL WORKS)

Contact Officer: Robert Bollen, Education Strategic Capital Manager
E-mail: robert.bollen@bromley.gov.uk

Dr Tessa Moore, Assistant Director Education
E-mail: Tessa.Moore@bromley.gov.uk

Chief Officer: Executive Director of Education, Care & Health Services

Ward: West Wickham;

1. Reason for report

This report is to inform the Executive of the outcome of the statutory consultation for the enlargement of Glebe Foundation Special School by 104 places, and to request permission to engage a consultant to undertake initial feasibility and planning work.

2. RECOMMENDATIONS

- 2.1 That the Executive note the Education Portfolio Holder's decision on the expansion of Glebe School taken at the Education Portfolio Meeting on 21st August 2013
- 2.2 Authorise the Education Portfolio Holder to agree the procurement of consultants to undertake the development of proposals including feasibility, design development, production of tender documentation and supervision.
- 2.3 That the project be brought back to the Executive and Full Council following feasibility for consideration of inclusion within the Council's capital programme
- 2.4 Authorise the Executive Director of Education, Care and Health Services to seek planning consent at the appropriate time.

Corporate Policy

1. Policy Status: Existing Policy
 2. BBB Priority: Children and Young People
-

Financial

1. Cost of proposal: Estimated Cost - £4.8m
 2. Ongoing costs: Non-Recurring Cost
 3. Budget head/performance centre: Dedicated Schools Grant
 4. Total current budget for this head: £128m
 5. Source of funding: Dedicated Schools Grant
-

Staff

1. Number of staff (current and additional): n/a
 2. If from existing staff resources, number of staff hours: n/a
-

Legal

1. Legal Requirement: Statutory Requirement Education Act 1996 (as amended)
 2. Call-in: Applicable
-

Customer Impact

1. Estimated number of users/beneficiaries (current and projected): 104 parents and carers
-

Ward Councillor Views

1. Have Ward Councillors been asked for comments? Yes
 2. Summary of Ward Councillors comments: None given although support was given by Ward Councillors at the consultation stage

3. COMMENTARY

- 3.1 There is an increasing need for additional, in-borough provision for secondary aged pupils with Autistic Spectrum Disorder (ASD). The number of children now diagnosed with ASD is growing, resulting in a projected shortfall of specialist ASD places by 2021 of 120 11-16 year olds and 36 post 16 places.
- 3.2 On 25 July 2012 the Executive gave in principle approval to, subject to statutory consultation, the expansion of Glebe School by 2 Forms of Entry (FE), i.e. 16 children in each year group, from September 2014, with 12 in years 12 and 13, a total of 104 places. At the meeting the Executive requested that outcome of the consultation be reported back and, subject to a satisfactory outcome, that the Executive approve a loan from the Council's reserves of £4.8m to complete the necessary building works to be repaid by the Dedicated Schools Grant over 6 years and the procurement of the consultancy relating to the building.
- 3.3 Members also requested further information about the number of pupils receiving schooling out of borough who may choose to return to Bromley and those that might be placed in this Bromley provision by other local authorities. Every endeavour is made to prompt families to consider in borough provision if space is available, and in many cases, where the local authority has indicated it has in-borough provision available that can meet needs, it would through the statutory procedures consult and name local provision. However this additional provision will be built up over time commencing with year 7 pupils in the first year, increasing year on year as each new year group is established. This provision will ensure that pupils moving through the system at primary age into secondary school will remain in Borough in local and high quality specialist provision. With regards to placements of pupils from out of borough taking up places in Bromley specialist provision, the aim would be to ensure early statutory reviews of Bromley pupils with the view of block placements of Bromley pupils into the specialist provision available.
- 3.4 Subsequent to the July 2012 meeting, the Dedicated Schools Grant (DSG) for 2012/13 was underspent by £5.4m, negating the requirement for the loan from reserves. This underspend will be carried forward into future years until required.
- 3.5 The project will be funded from the £800k contribution to capital in the DSG budget, supplemented by the DSG carry forward as and when required.
- 3.6 Informal consultation on the proposal to expand the Glebe School ran from 11 January to 15 February 2013.
- 3.7 The outcomes of informal consultation were reported to Education PDS on 19 March 2013 and it was agreed to proceed to statutory consultation. The statutory notice was published in the Bromley News Shopper on 12 June 2013 on behalf of the Governors.
- 3.8 Statutory consultation took place during Summer 2013. No comments or objections were received and outcomes were reported to the Education Portfolio Meeting on 21 August 2013.
- 3.9 At the Education Portfolio Meeting on 21 August 2013 the Education Portfolio resolved that the expansion of the Glebe Foundation School with effect from 1st September 2014 be approved as set out in the statutory notice.

4. POLICY IMPLICATIONS

- 4.1 The numbers of secondary age students being diagnosed with Autistic Spectrum Disorder is growing and the proposal to expand Glebe School will enable more students to be placed in an appropriate setting within the borough. This will allow them to maintain local contacts and make it easier for parents and carers to support their children in the school. Glebe has already

developed a substantial expertise in this area and the expansion will allow this good practice to be extended. Placing children in out borough schools also diverts money away from local schools, and the provision is more difficult to monitor.

- 4.2 The proposal was widely supported at the consultation stage by parents, carers, other schools and agencies with an interest in this area of special educational needs.

5. FINANCIAL IMPLICATIONS

- 5.1 The expansion of the school will require building alterations to accommodate the additional numbers, at an estimated cost of £4.8m. This will be funded from the Dedicated Schools Grants (DSG) budget, in addition to the DSG underspend carried forward from 2012/13.
- 5.2 Initial works will be funded from the feasibilities studies funding in the capital programme, which will be added to the costs of the expansion project, or charged to revenue (DSG funded) if the project is not approved.
- 5.3 The costs of educational placements (both maintained and non-maintained and in/out borough) is funded from the Dedicated Schools Grant (DSG) and the cost of transport through the Revenue Support Grant (RSG). By placing children in Glebe rather than out of borough the Council would save £6.1m on DSG and £924k on RSG over a 7 year (cumulative) period, taking into account the full savings in the year after completion. The calculations for the savings totals are detailed in Report ED12015.

6. LEGAL IMPLICATIONS

- 6.1 The LA has a duty to implement proposals from the statutory consultations on expanding the school once decided.
- 6.2 In order to deliver the works, the school will need to obtain a licence to undertake works at a Foundation School.
- 6.3 The distribution and application of monies received from Central Government is subject to guidance and advice from the Department for Education. Under Section 14 Education Act 1996 the Council has a statutory duty to ensure that there are enough primary and secondary school places are available to meet the needs of pupils in its area.

7. PERSONNEL IMPLICATIONS

- 7.1 In delivering the expansion the school will require support. Implications may include the grading for the Head Teacher as the Individual School Range may be affected, and the number of teaching Full Time Equivalent (FTE) staff required to facilitate the curriculum and support the infrastructure.

Non-Applicable Sections:	N/A
Background Documents: (Access via Contact Officer)	DEVELOPMENT OF AUTISM SPECTRUM DISORDER (ASD) SECONDARY PROVISION AT GLEBE SPECIAL SCHOOL – EXEXECUTIVE 25 JULY 2012 CONSULTATION OUTCOMES: PROPOSAL TO EXPAND GLEBE SCHOOL: EDUCATION PDS 19 MARCH 2013 GLEBE SPECIAL SCHOOL - DETERMINATION OF STATUTORY NOTICE 21 AUGUST 2013

Agenda Item 6

Report No
ED13099

London Borough of Bromley

PART ONE - PUBLIC

Decision Maker: **SCHOOLS' FORUM**

Date: **Thursday 26 September 2013**

Decision Type: Non-Urgent Non-Executive Non-Key

Title: **2013/14 DEDICATED SCHOOLS GRANT FINAL ALLOCATION**

Contact Officer: Amanda Russell, Head of Schools Finance Support
Tel: 020 8313 4806 E-mail: Amanda.Russell@bromley.gov.uk

Chief Officer: Executive Director of Education, Care & Health Services

Ward: (All Wards);

1. Reason for report

This report provides information on the final DSG allocation for 2013-14.

2. **RECOMMENDATION(S)**

The Schools Forum is invited to discuss the final DSG allocation as required for completion of the Chief Finance Officers statement.

3. COMMENTARY

- 3.1 As part of the Chief Finance Officers statement which is due to be submitted to DfE by 31st October, the Local Authority is required to confirm that the final DSG allocation has been discussed with the Schools Forum.
- 3.2 Appendix 1 shows the final DSG allocations as taken from the DfE website and highlights the individual allocation to Bromley. The final DSG for Bromley is £129.123 million – this is after the deduction of the academy and high needs recoupment. This has then been reconciled to the LA spreadsheet which clearly trails the allocation across the three blocks ; High Needs, Early Years and Schools Block. This is attached at Appendix 2. The Schools Forum is reminded that these blocks are notional only and that the funding in each block is not ring fenced.
- 3.3 The LA expenditure is unchanged with the exception of academy and high needs expenditure which has now showing as recoupment and is therefore offset against the income. The information is now showing a surplus of income over expenditure of £1,085,452. This figures has increased due to two main reasons:
- I. Increase in the number of pupils used to calculate the Early Years funding – if this increase is correct then it is fair to assume that the expenditure in year will also increase.
 - II. Decrease in the amount of funding that has been recouped from the LA for academies, relating specifically to the adjustment for SEN funding for the period April to August. Although this figure is held in the Schools Block it could also be seen to relate to the High Needs block.
- 3.4 The Schools Forum are invited to discuss this information and to consider how the surplus balance night be used. However, in doing so they are reminded that as part of the funding review the DfE have stated that school budget share cannot be changed in year – see extract from DfE below.

Redetermination of budget shares

It is not permissible to make an in-year redetermination of schools' budget shares for pupils aged 5-16. Any DSG underspend brought forward from the previous year may be used to support central expenditure (providing no limits are breached) in the schools block, or transferred to either the high needs or early years block. Alternatively, the underspend may be carried forward to the next funding period and allocated to schools via the funding formula. Previously, authorities were able to redetermine schools' funding at any time before or during the funding period and for 2012-13, this power was set out in paragraph 12 of the School Finance (England) Regulations 2012. This power has now been removed in the School and Early Years Finance (England) Regulations 2012, which relate to the 2013-14 financial year. There is no mechanism outside of the funding formula for authorities to fund schools. Schools must be funded through the approved formula and any other expenditure is classed as central expenditure, which is clearly defined in Schedule 2 of the Regulations.

- 3.5 In view of this any additional funding would need to be channelled thought either the Early Years or the High Needs Block. Alternatively any surplus funding could be carried forward to the next financial year along with any previously unspent DSG.
- 3.6 The Schools Forum is asked to formally minute their discussion on the final DSG as required for the completion of the Chief Finance Officer's Statement.

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2012/13 Funding
£

Total

DSG		220,809,000		1				
	High Needs Block		Early Years Block		Schools Block			
	44,094,983	4	11,415,538	3	165,298,479	2		
less Hospital Top-slice	-73,915		-18,930		-275,977			
less EY baseline	-161,514		-41,365		-603,048			
	43,859,554		11,355,243		164,419,454			
interauthority recoupment	478,590				-478,590			
YPLA SEN					1,605,720			
High Needs Baseline	44,338,144							
Cross border funding minus funding out to other LAs plus funding in from other LAs	-511,930 834,186							
Provisional Baseline	44,660,400	7	11,355,243	6	165,546,584	5		
YPLA SEN	-1,605,720	8	Pupil nos 12/13	2,912	11	Pupil nos 12/13	40,552	10
	43,054,680	9/18						
Funding for growth agreed by LA's post 16 apr - jul post 16 aug - mar	133,000 533,000 2,728,000	19 20 21	Baseline £ per pupil	3,899.47	13	Baseline £ per pupil	4,082.33	12
			Pupil nos 13/14	3,038	15	Pupil nos 13/14	41,114	14
Estimated Funding 2013/14	46,448,680	22	11,846,576	17	167,840,853	16		
Recoupment	-1,122,000	28			Recoupment	-99,239,000	27	
	45,326,680	32	11,846,576	31	68,601,853	30	125,775,108	
NMSS	79,000	26	2 yr old funding	2,801,000	23	NQT	63,000	25
			3 yr old trans	404,000	24			
Final DSG	45,405,680		15,051,576		68,664,853		129,122,108	34
Expenditure								
SEN Support in Preschools	366,490							
Specialist Support and Disability	353,500							
Complex Needs Team	314,120							
Phoenix Pre School Service	1,706,980							
Early Support Programme	120,710							
SEN Transport	330,000							
Special Central	56,850							
Other Statemented	448,060							
SEN Outborough Fees	15,505,522							
SEN in FE Colleges	3,091,830							
Pupil Support	515,000							
Special capital	813,810							
Insurance	21,560							
	High Needs Block		Early Years Block		Schools Block			
Total Expenditure	44,552,250		14,181,966		69,302,440		128,036,656	
Estimated Surplus/Shortfall	853,430		869,610		-637,587		1,085,452	

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Agenda Item 7

Report No.
ED13100

London Borough of Bromley

PART ONE - PUBLIC

Decision Maker: **SCHOOLS' FORUM**

Date: **Thursday 26 September 2013**

Decision Type: Urgent Non-Urgent Executive Non-Executive Key Non-Key

Title: **OUTCOME OF CONSULTATION ON 2014/15 FUNDING REVIEW**

Contact Officer: Amanda Russell, Head of Schools Finance Support
Tel: 020 8313 4806 E-mail: Amanda.Russell@bromley.gov.uk

Chief Officer: Executive Director of Education, Care & Health Services

Ward: (All Wards);

1. Reason for report

This report provides an update on the proposed changes to the LA Funding Formula based of the outcome of consultation with schools.

2. **RECOMMENDATION(S)**

The Schools Forum is asked to discuss the proposed changes as outlined in the report.

3. COMMENTARY

3.1 The Department for Education (DfE) recently issued further guidance to assist local authorities and Schools Forums in planning the local implementation of the reformed funding system for 2014-15. Full details of the guidance notes can be found at the following link. <https://www.gov.uk/government/publications/2014-to-2015-revenue-funding-arrangements-operational-information-for-local-authorities>.

3.2 The main changes are highlighted below:

- Required minimum value for Age-Weighted Pupil Unit (AWPU) set at £2,000 for primary schools and £3,000 for secondary schools. Bromley values for 2013/14 were in excess on the minimum requirement.
- The upper limit for the lump sum has been reduced to £175,000. As the Bromley lump sum was set at £180,000 in 2013/14 this will need to be reviewed.
- For 2014/15 a different lump sum can be used for primary and secondary schools.
- A new sparsity value has been introduced. Bromley schools data to be reviewed to see if any schools would be eligible.
- The attainment measure for secondary schools has changed to target pupils achieving level 3 or below in either English OR Maths as opposed to English AND Maths in 2013/14.
- Where schools are amalgamating, they can retain the equivalent of 85% of two lump sums for the financial year following the year in which they merge.
- The local authority must ensure that at least 80% of delegated funding is allocated through pupil-led factors. The Bromley formula for 2013/14 exceeded this at 89%.
- The DfE are not prescribing any restraints on the primary/secondary ratio for 2014/15. However they have not ruled this out for future years and are advising local authorities to be aware of where they sit within the range.
- For high needs funding, the threshold has now been set at £6,000 as a mandatory level, whereas in 2013/14 this was the recommended level. Bromley has worked to the recommend level of £6,000.

3.3 These issues were considered by the Schools Forum at their meeting in July and it was agreed that for primary schools the lump sum would be adjusted to £175,000 but there would be no other changes for primary schools.

3.4 However, for secondary schools the changes are more significant. The biggest issue is that changing the measure of attainment from “and” to “or” has increased the number of pupils eligible for this funding from 1,249 to 3,441, an increase of over 275%. As a result of this, and following consultation with the Schools Forum working party consisting of two secondary representatives, it is proposed that the per pupil sum for attainment should be adjusted to reflect this. This would mean that where £2,500 has been allocated for pupils not attaining in English and maths this year, this should be reduced to £1,250 per pupil in 2014/15. Any pupil not attaining in both subjects would then receive the equivalent of this year’s funding. There is however still a pressure on the budget with the addition of around 940 pupils that are not attaining in either English or maths. This will require additional funding in excess of £1m to support this.

3.5 This funding will need to be found within the existing secondary sector funding as there is no additional funding to support this. The working group has looked at two options as follows:

- (i) Additional funding to be taken from AWPU.
- (ii) Additional funding to be taken from the lump sum.

These two options are demonstrated on **Appendix 1**.

Option A shows the impact of funding the additional non-attaining pupils at £1,250, and with a lump sum of £175,000 – note the lump sum has been reduced in line with DfE requirements and in line with primary schools. However, as this does not release sufficient funding on its own, the remainder has been found by reducing the AWPU value.

Option B shows the impact of funding the additional attainment costs by having a zero lump sum. As part of the original consultation process in 2012 a number of secondary schools expressed the view that there was no need for a lump sum for secondary schools. Therefore as part of this consultation we are looking at this as the only alternative suggestion as opposed to looking at a range of lump sums. However, as this releases more funding than is required for the attainment, the additional funding has been put into AWPU.

3.6 From the modelling it can be seen that some schools gain from these proposed changes, whereas others are losers. The modelling has been produced using Minimum Funding Guarantee (MFG) figures only as opposed to the formula figures as this allows to schools to see what the actual impact might be on their budgets in 2014/15. As a result of this, no increase or decrease is larger than 1.5%. However, as with any modelling data there are some “health warnings” that schools should be aware of:

- (i) Data is modelled using 2013/14 attainment data and pupil numbers – the actual data for 2014/15 may vary.
- (ii) If this data varies then the per pupil funding may also vary – it is anticipated that the funding for the supplements will remain the same and any adjustments will be made through AWPU.
- (iii) This formula is being consulted on for 2014/15 only – the national funding formula is due to be introduced in 2015/16 and as a result of this school funding allocations may vary considerably.
- (iv) Schools should therefore not see the modelling data as an accurate indication of their 2014/15 funding.

3.7 Seven consultation responses have been received from schools as follows:

- Two responses from Secondary schools supporting Option B but with no additional comments
- One response from a Primary School supporting Option A and with the following comment ;
I disagree with the reduction in the lump sum overall for Secondary and Primary as most schools will be worse off. Primary schools can't afford any reduction in budgets. This will lead to staff redundancies and lack of attainment.

3.8 The remaining four responses from secondary schools which include an email from Karen Raven, Head Teacher at Beaverwood School and a member of the Schools Forum, states that Bromley Head Teachers do not support either of the options in the consultation and suggests that there needs to be more detailed discussion at the Schools Forum meeting. Mrs Raven has offered to provide an alternative scheme which will be tabled at the meeting. The other three responses do not support either option and include the following comments:

- *We feel that the impact of the changes are to far reaching to only have two options, we would like this to be taken back to the forum for further discussion*

- *We do not support either options. We do not agree that the additional funding should be found within the existing secondary sector funding, as the problem of low attainment (i.e. students not achieving level 3 in Maths or English) stems from primary schools, and it is unfair to penalise the secondary schools for something that the primary schools have failed to achieve. The proposal is exceptionally unfair to Langley Park School for Girl/Boys, where yet again, either option will result in a significant loss of funding - it would appear that we are yet again being penalised for the fact that our students are relatively high achievers compared to other secondary schools. It is clear from Appendix 1 that many secondary schools actually stand to GAIN from this change in the funding formula, just as they have done so in the previous years. That this gain is achieved at the expense of Langley Park School for Girls/Boys is inequitable and totally unacceptable,
We would like the Schools Forum to be aware that we strongly oppose either options put forward by the consultaion paper and urge them to consider a more equitable solution.
(same comment from two schools)*

3.9 In view of this the LA cannot recommend either option to the Schools Forum at this stage, and suggest the Schools Forum discuss this issue at greater length. However, The Forum is reminded that the completed proforma confirming any changes to the LA funding formula needs to be submitted to the DfE by the end of October, having been agreed by Members and that therefore the timescale is very tight.

	2013/14			Revised data		A			B		
	pupil nos	Attain.	Funding	attainment	nos	£175k Lump sum/ £1,250 attainment			Zero Lump sum/ £1,250 attainment		
		nos	AWPU £4,095	%		Revised	AWPU £4,035	% diff	Revised	AWPU £4,205	% diff
						Funding	diff		Funding	diff	% diff
Harris Academy Beckenham	645	95	£3,654,099	34.69	224	£3,602,967	£51,132	-1.4%	£3,600,342	£53,757	-1.5%
Harris Academy Bromley	840	102	£4,407,216	27.88	234	£4,471,105	£63,889	1.4%	£4,444,664	£37,448	0.8%
Bishop Justus Church of England School	898	67	£4,411,708	22.42	201	£4,414,913	£3,205	0.1%	£4,392,573	£19,135	-0.4%
Bullers Wood School	1,087	54	£5,122,856	17.63	192	£5,135,680	£12,824	0.3%	£5,145,470	£22,614	0.4%
Coopers Technology College	1,102	99	£5,275,587	26.73	295	£5,352,739	£77,151	1.5%	£5,355,364	£79,776	1.5%
Langley Park School for Boys	1,047	49	£4,858,346	13.65	143	£4,791,162	£67,184	-1.4%	£4,786,745	£71,602	-1.5%
Ravens Wood School	1,115	51	£5,120,359	14.95	167	£5,120,032	£327	0.0%	£5,134,582	£14,223	0.3%
NEWSTEAD WOOD SCHOOL	676	0	£3,065,335	0	0	£3,023,843	£41,492	-1.4%	£3,021,218	£44,117	-1.4%
Kemnal Technology College	888	108	£4,441,471	27.69	246	£4,502,516	£61,045	1.4%	£4,478,476	£37,005	0.8%
Hayes School	1,188	80	£5,479,351	18.79	223	£5,473,508	£5,843	-0.1%	£5,500,468	£21,117	0.4%
Beaverwood School for Girls	1,103	61	£5,099,774	19.80	218	£5,174,232	£74,458	1.5%	£5,176,857	£77,083	1.5%
CHARLES DARWIN	1,053	112	£4,965,488	27.39	288	£5,037,966	£72,478	1.5%	£5,040,591	£75,103	1.5%
Langley Park School for Girls	1,189	38	£5,625,867	14.04	167	£5,545,843	£80,024	-1.4%	£5,543,218	£82,649	-1.5%
The Ravensbourne School	1,090	101	£5,520,696	24.49	267	£5,529,439	£8,743	0.2%	£5,539,739	£19,043	0.3%
Darrick Wood School	1,308	75	£6,048,050	17.04	223	£6,020,788	£27,262	-0.5%	£6,068,148	£20,098	0.3%
The Priory School	950	158	£5,183,158	35.98	342	£5,114,671	£68,487	-1.3%	£5,107,626	£75,532	-1.5%
ST OLAVE'S GRAMMAR SCHOOL	594	0	£2,767,565	0	0	£2,730,646	£36,919	-1.3%	£2,728,021	£39,544	-1.4%

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ALTERNATIVE SOLUTION FOR PROPOSED CHANGES TO FUNDING FORMULA FOR 2014/15 – CIRCULAR NO: 055/13

The further guidance issued by the Department of Education (DfE) to assist local authorities and Schools Forums in planning local implementation of the reformed funding system for 2014-15 is detailed at <https://www.gov.uk/government/publications/2014-to-2015-revenue-funding-arrangements-operational-information-for-local-authorities>.

Circular no: 055/13 detailed these changes and suggested significant change in the funding system for secondary schools. Following feedback from Secondary Heads this paper details an alternative solution to the change in guidance.

The main issue is the change in the description of attainment measure for secondary schools to target pupils achieving level 3 or below in either English OR Maths as opposed to English AND Maths in 2013/14. The circular identifies that under this new descriptor a further 940 pupils fulfil the attainment criteria. The original proposal was to reduce the attainment value to half of the 2013/14 value of £2,500 so that students not achieving English AND Maths would attract the same level of funding, this however creates an issue where further funding for the additional 940 pupils at £1,250 requires additional funding in excess of £1m to support this.

The circular limits the resolution with 'only with secondary schools' however a lack of prior attainment develops in the primaries. Additionally, as this situation has arisen due to changes in definition by the DfE this initiative should be funded appropriately by them and the LA should request an additional allocation. Notwithstanding the above there is a simpler, fairer, more appropriate solution. The £2,500 is intended only for specific 'under achieving' students and has created a total and specific allocation.

We should not be using AWPU nor lump sum to fund this 'one off' change for a relatively small number of students. This has always been the Forum's guiding principle. The alternative solution therefore is merely to reallocate funds attributed to attainment over the greater number of students who fall within the new descriptor. The calculation and redistribution would be as follows:

1.	Original students eligible	=	1249 x £2,500
		=	3,122,500
2.	New eligible students	=	3441
			3,122,500 ÷ 3441
	Per student	=	907.44

3. £907 per student allocated to each school as appropriate and MFG applied as necessary.

4. Obviously, there will still be also winners and losers, compared with 2013/14 budgets, but this is always the case when the DfE introduce changes, but with no increase in basic 'allocation'.

We should not be trying to create 'additional' money by impacting negatively upon all other students, as the two options already provided ask us to do.

Only 940 additional students are eligible and can be accommodated within the original 'pot'.

5. A longer term consideration is that by tinkering with Secondary AWPU and removing lump sum weakens our position regarding funding in other areas and in 2015/16. We would not wish to set a precedent in attempting to solve a relatively small problem.

6. As we await a National Funding Formula making such major change is inappropriate at this time.

K Raven
17 September 2013