



THE LONDON BOROUGH
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To: Members of the
SCHOOLS' FORUM

- | | |
|--------------------------|--|
| David Dilling (Chairman) | Primary Academy Governor (Charles Darwin Academy Trust) |
| Claire Bessa | Secondary Academy Head Teacher (E21C) |
| Rebecca Cottage | Special Head/Governor Maintained |
| Tracey Davies | Non-Schools Representative(14-19 Partnership)(Bromley Academy Trust) |
| Andrew Ferguson | Non-School Representative (Church of England)(Aquinas Trust) |
| Patrick Foley | Primary Maintained Head Teacher (Southborough Primary School) |
| Clare Grainger | Non-Schools' Representative (Joint Teacher Liaison Committee)(Connect Multi Academy Trust) |
| Chris Hollands | Primary Academy Head Teacher (Aquinas Trust) |
| Izabela Lecybyl | Non-School Representative (Catholic Church) |
| Neil Miller | PRU Head Teacher/Governor Academy (Bromley Trust Academy) |
| Andrew Rees | Secondary Maintained School Head Teacher (St Olaves Grammar School) |
| Brid Stenson | Non-School Representative (Early Years) |
| Ian Travis | Special Head Teacher/Governor Academy (Glebe School) |
| Gareth Walters | Primary Academy Governor (Compass Academy Trust) |
| Steve Whittle | Secondary Academy Head Teacher (Impact Multi Academy Trust) |
| David Wilcox | Secondary Academy Governor (Darrick Wood School) |
| 1 x vacancy | Primary Academy Governor |
| 1 x vacancy | Secondary Academy Governor |

A virtual meeting of the Schools' Forum will be held on **THURSDAY 8 JULY 2021 AT 4.30 PM** *

Details of how to view the meeting are available under separate cover

*** PLEASE NOTE STARTING TIME AND VENUE**

MARK BOWEN
Director of Corporate Services

A G E N D A

- 1 APOLOGIES FOR ABSENCE**
- 2 ELECTION OF CHAIRMAN AND VICE-CHAIRMAN**
- 3 MINUTES OF THE MEETINGS HELD ON 21 JANUARY 2021 AND 23 MARCH 2021**
(Pages 3 - 14)
- 4 CEF PROVISIONAL OUTTURN REPORT 2020/21** (Pages 15 - 26)
- 5 SPENDING BY PRIMARY, SECONDARY AND SPECIAL MAINTAINED SCHOOLS**
IN 2020/21 (Pages 27 - 34)
- 6 FALLING ROLLS FUND 2021/22** (Pages 35 - 40)
- 7 ANY OTHER BUSINESS**
- 8 DATE OF NEXT MEETING**
16 September 2021

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SCHOOLS' FORUM

Minutes of the meeting held at 4.30 pm on 21 January 2021

Present:

David Dilling (Chairman)	Primary Academy Governor (Charles Darwin Academy Trust)
Rebecca Cottage	Special Head/Governor Maintained
Andrew Ferguson	Non-School Representative (Church of England)(Aquinas Trust)
Izabela Lecybyl	Non-School Representative (Catholic Church)
Neil Miller	PRU Head Teacher/Governor Academy (Bromley Trust Academy)
Andrew Rees	Secondary Maintained School Head Teacher (St Olaves Grammar School)
Brid Stenson	Non-School Representative (Early Years)
Gareth Walters	Primary Academy Governor (Compass Academy Trust)
Steve Whittle	Secondary Academy Head Teacher (Langley Park Trust)
David Wilcox	Secondary Academy Governor (Darrick Wood School)

Also Present:

David Bradshaw	Head of Children's Services Finance
Julie Crew	Head of Schools' Finance Support
Jared Nehra	Director of Education
Philippa Gibbs	Democratic Services Officer

18 APOLOGIES FOR ABSENCE

Apologies for absence were received from Patrick Foley.

The Chairman welcomed Ms Rebecca Cottage and Mr Andrew Ferguson to the Schools' Forum.

19 ELECTION OF VICE-CHAIRMAN

The Schools' Forum noted that the previous Vice-Chairman of the Schools' Forum, Mr David Bridger, had recently resigned. Mr Bridger had been a Member and Vice-Chairman of the Bromley Schools' Forum almost from its inception. Wishing Mr Bridger well for the future, the Chairman and Schools' Forum recognised the invaluable contribution that he had been made over the years recognising that his presence would be missed.

As there was currently no immediate candidate for Vice-Chairman, it was agreed that an item would be added to the agenda for the next meeting to enable all members to reflect on a suitable candidate for the role.

RESOLVED: That the election of the Vice-Chairman be postponed until the next meeting of the Schools' Forum.

20 MINUTES OF THE MEETING HELD ON 5 NOVEMBER 2020

The minutes of the meeting held on 5 November 2020 were approved, and signed as a correct record.

Matters Arising

The Schools' Forum noted that training for Members of the Schools' Forum would be conducted at the end of March 2021.

21 2021/22 DEDICATED SCHOOLS GRANT Report CEF21001

The report provided an outline of the final DSG allocation for 2021/22 and an overview of how this would be spent.

The final Dedicated Schools Grant (DSG) funding for 2021/22 had now been provided to all LAs to reflect the October 2020 census data. The final DSG for 2021/22 was divided into four blocks – High Needs, Early Years, Schools and Schools Central with the expected income detailed below

2021/22 Dedicated Schools Grant					
	High Needs Block	Early Years Block	Schools Block	Schools Central Block	Total
Gross Grant Funding	£58,728,780	£23,343,423	£237,832,719	£2,133,601	£322,038,523
Recoupment adjustment	-£9,954,000				-£9,954,000
Net Grant Allocation	£48,774,780	£23,343,423	£237,832,719	£2,133,601	£312,084,523

In opening the discussion, the Chairman thanked the Officers from the Local Authority for the work they had undertaken, noting the very tight timescales involved in the production of the report.

Schools Central Block

The Forum noted that the increase in the Central Block has been mainly due to the inclusion of the Teachers' Pay and Pension Grant for centrally employed teachers which had now been merged into the DSG. This year the Council would be contributing £410,000 to support the Central Block.

Early Years Block

There had been an increase in the Early Years Block due to the increases in the hourly rates payable and expenditure was predicted to match income.

The Schools' Forum noted the anxiety that existed with some Early Years providers around the funding in light of possible closures arising from the Covid-19 pandemic. The Director of Education recognised the anxiety that existed and explained that the Local Authority had sought to do all it could to support local Early Years settings by offering additional funding protection within the grant conditions set by the DfE. Consequently, no significant fluctuations in the Early Years Block were anticipated.

The Schools' Forum supported the decisions that had been taken to ensure that Early Years Settings were fully funded during the period of closures arising from Covid-19.

Schools Block

The Schools' Forum noted that the Schools Block funding had been calculated using the October 2020 census pupil numbers and the per pupil units of funding calculated for 2021/22. Based on the published figures the Primary unit of funding had increased from £4,282 to £4,595, an increase of around 7.3% and the Secondary unit of funding had increased from £5,408 to £5,863, an increase of around 8.4%. Funding had risen significantly year on year (by £19.4m between 2020/21 and 2021/22), however the majority of this (£11m) was due to the teachers' pay and pension grant which had now been rolled into the DSG allocation.

The main changes to the NFF for 2021/22 were as follows – (a) Funding previously received through the Teachers Pay Grant (TPG) and Teachers Pension Employer Contribution (TPECG), including the supplementary fund, to mainstream schools for pupils from Reception to Year 11 had now been added to the baseline. (b) Unit values had typically increased by 4%. (c) Minimum per pupil funding levels were now compulsory and had been set at £4,180 for primary schools and £5,415 for secondary schools. (d) The Minimum Funding Guarantee (MFG) level was required to be between 0.5% and 2%. For Bromley the level had been set at 2%.

The Schools' Forum noted that there were 17 primary schools that had become eligible for minimum per pupil funding protection and would receive collectively around £1.89m.

The Forum noted that without the inclusion of the £11m grant for teachers' pay and pension that although there would be an overall increase in the levels of funding, these would be similar increases to previous years. It was agreed that, if possible, details of the grant discounting the teachers' pay and pension element would be provided to the next meeting.

In response to a question, the Head of Children's Services Finance explained that it was mainly primary schools that received the minimum funding guarantee. This had been expected as with the National Funding Formula funding was skewed more towards secondary schools than it had been under the previous Bromley Funding Formula. 53 primary schools and 1 secondary were currently in receipt of the minimum funding guarantee but not all schools received the same level of funding guarantee. The Schools' Forum noted that the minimum funding guarantee would be around for a period of time.

The Chairman suggested that it would be helpful to analyse growth funding, minimum per pupil funding and the minimum funding guarantee to see how individual schools were affected.

High Needs Block

The High Needs Block was seeing pressures coming through the system. Nationally the Government were seeing some authorities building up high levels of deficit reserves. This particular funding issue was acknowledged, and funding was committed for 2021/22 resulting in an increase in high needs block funding of £5.7m for Bromley. This was due to the increases in per pupil funding and the increase in pupils themselves. £939k of the increase related to pay and pension increases that were paid through specific grants which had now been integrated into the overall High Needs Block calculation.

Whilst the funding was welcomed it was predicted that levels of growth would outstrip the current funding levels over the next four years. Moreover, funding for the High Needs Block had not been confirmed beyond 2021/22 and therefore it had been assumed that Bromley would continue to receive similar increases in subsequent years. To mitigate against the predicted growth, further savings had also been assumed as part of the Medium-Term Financial Strategy. These were predicated on slowing the rate of increase in EHCPs and to incrementally place more children in local schools although it was recognised that this approach carried significant risks. The Schools' Forum noted that there would continue to be significant pressures on the High Needs Block which remained a real concern and the Local Authority would continue to lobby for the High Needs Funding required to address increasing demand.

In response to a question, the Head of Children's Services Finance confirmed that the changes on the recoupment figure (from the figure presented in November 2020 report) were due to the effect of the updated October 2020 pupil census data and had been based on the figures provided by the DfE. The Director of Education noted that it was the mainstream academy units that were lower than the November report in terms of recoupment. The Head of Children's Services Finance agreed to undertake further analysis on this and circulate the information following the meeting.

The Head of Children's Services Finance confirmed in response to a question that there had been no further indication of levels of funding beyond 2021/22. It was hoped funding growth would continue in recognition of the increases in demand that had previously been acknowledged through funding increases. The Director

of Education confirmed that pressures on the High Needs Block continued to be a concern and would remain an area of focus. The Local Authority had welcomed the additional £5.7m allocated for the High Needs Block as this had been broadly in line with what the Local Authority felt was needed. However, the inclusion of the teachers' pay and pension grant unfortunately meant that there was no absolute confidence that there would be sufficient funding in future years. The Local Authority was also waiting for the DfE to deliver on the much-needed SEND Review which had been further delayed.

The Schools' Forum noted that the Local Authority was working to deliver sustainable services for the long-term within the high needs funding available. As part of this there would be more early intervention and a focus on outreach services.

In response to a question surround the high cost of out-of-borough provision, the Director of Education highlighted the ongoing need for more high quality in-borough local provision. As a result of this the Local Authority had sought to commission an in-borough Free School which would meet some of the local need. The process for securing a sponsor for the Free School was being led by the DfE and was ongoing and it was hoped that the process may conclude by the Spring of 2021. The Schools' Forum noted that out-of-borough cost pressures would continue to be a challenge for some time.

RESOLVED: That the final DSG income and forecast expenditure for 2021/22 be noted.

22 ANY OTHER BUSINESS

There was no other business.

23 DATE OF NEXT MEETING

The Schools' Forum noted that an additional meeting would be held in March 2021. Meetings for the next municipal year would be circulated as soon as they were available.

The Meeting ended at 5.29 pm

Chairman

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SCHOOLS' FORUM

Minutes of the meeting held at 4.30 pm on 23 March 2021

Present:

David Dilling (Chairman)	Primary Academy Governor (Charles Darwin Academy Trust)
Claire Bessa	Secondary Academy Head Teacher (E21C)
Rebecca Cottage	Special Head/Governor Maintained
Patrick Foley	Primary Maintained Head Teacher (Southborough Primary School)
Clare Grainger	Non-Schools' Representative (Joint Teacher Liaison Committee)(Connect Multi Academy Trust)
Chris Hollands	Primary Academy Head Teacher (Aquinas Trust)
Neil Miller	PRU Head Teacher/Governor Academy (Bromley Trust Academy)
Andrew Rees	Secondary Maintained School Head Teacher (St Olaves Grammar School)
Gareth Walters	Primary Academy Governor (Compass Academy Trust)
Steve Whittle	Secondary Academy Head Teacher (Langley Park Trust)
David Wilcox	Secondary Academy Governor (Darrick Wood School)

Also Present:

Julie Crew	Head of Schools Finance Support
David Bradshaw	Head of CEF Finance
Jared Nehra	Director of Education
Philippa Gibbs	Democratic Services Officer

24 APOLOGIES FOR ABSENCE

The Chairman welcomed Claire Bessa to the meeting.

Apologies for absence were received from Tracey Davies and Izabela Lecybyl.

Clare Grainger submitted apologies for leaving the meeting at 5pm and following Claire Bessa submitted apologies for leaving the meeting due to technical issues.

Following the meeting Andrew Ferguson extended apologies for absence.

25 HIGH NEEDS FUNDING CONSULTATION
Report CEF21014

The report provided details of the High Needs Funding consultation and the Council's proposed response.

The Head of Children, Education and Families (CEF) Finance introduced the report explaining that the ambition was to produce a joint response to the consultation on behalf of the Local Authority and the Schools' Forum.

The Schools' Forum noted that in Bromley there was a high level of funding protection in the formula and Officers had tried to reflect this in the responses that had been drafted.

Question 1

In response to a question concerning the rationale for the use of 2017/18 for the historic spend factor in the high needs national funding formula, the Head of CEF Finance explained that the movement in the high needs block had begun in 2017/18. This financial year was being used as a point in time before some of the major changes were introduced and was the basis for the way in which some of the current high needs funding was driven.

The Schools' Forum agreed the response to Question 1.

Question 2

In response to a question, the Head of CEF Finance confirmed that funding protection was in place and there was currently no indication of a limit being placed on the length of time this protection would be in place.

It was agreed that the response to the question should spell out the assumption that funding protection would continue.

The Schools' Forum agreed the response to Question 2, subject to the amendment outlined above.

Question 3

A Member suggested that, like the previous question, the response to question 3 should reflect the need for the continuation of funding protection based on nationally available data.

It was noted that the use of EHCPs and Alternative Provision was a key factor in the level of need going forward. The issue of the use of historical data was considered and a Member highlighted the significant difference there could be between the spend in 2017/18 and the current spend in 2020/21 and the spend that would be required in 2022/23. The Head of CEF Finance explained that 2017/18 was when the methodology first began and it was therefore being used as a driver for the way in which funding could be distributed to Local Authorities.

The Schools' Forum agreed the response to Question 3, subject to the amendment outlined above.

Question 4

The Schools' Forum endorsed the proposed response to Question 4.

Question 5

The Schools' Forum supported the suggestion of using "Ever6" as the proxy measure and endorsed the proposed response to question 5.

Question 6

The Schools' Forum noted the failure of the consultation to address the fundamental issue of underfunding. Following discussion Members of the Forum supported the expanded response which highlighted the challenges faced by schools across the Borough.

It was also suggested that the equalities issue should be addressed in response to question 6 as a reduction in funding would impact students with disabilities.

The Forum endorsed the response to Question 6, subject to amendments to highlight the equalities aspect and that the use of any proxy would undermine the subtleties of students that may present with a range of disabilities and protected characteristics.

RESOLVED: That draft response to the High Needs Funding Consultation be endorsed subject to the amendments outlined above.

26 UPDATE ON REVIEW OF ALTERNATIVE PROVISION Report CEF21015

The report provided an update on the actions taken to respond to the findings and recommendations from the Strategic Review of Alternate Provision reported in November 2019.

The Schools' Forum noted that Mr Neil Miller represented the provider cited in the report and would therefore not take part in any vote.

The Director of Education explained that the process commenced in 2019, with the commissioning of a strategic review of alternative provision by an external expert. The key findings of the review were set out in the report which included aspects around the quality of provision and the challenges around maximising funding to ensure that the provision in the Borough was as effective as possible. Going forward there was an expectation that early intervention was implemented to support more children and young people at an earlier stage.

In terms of taking forward the findings and recommendations, working groups for both primary and secondary were established in addition to a separate project around mental health provision. The Primary and Secondary Working Groups were largely school-led and had considered various aspects of the review as well as local information, knowledge and expertise. As well as drawing upon the expert knowledge of the provider, Bromley Trust Academy.

A number of design principals (set out in the report) were agreed and these had now been formally ratified and had informed the subsequent work.

The Director of Education set out the next steps, which included fair access protocols, a five-year commissioning approach, and the principal of 'the money follows the child'.

In conclusion, the Director of Education extended his thanks to all head teachers and colleagues at Bromley Trust Academy for their support throughout the review.

RESOLVED: That

- 1. The actions taken to date to implement the recommendations from the Strategic Review including the new Design Principles for Bromley's AP System be noted;**
- 2. The 5 year commissioning plan and its overarching aim to shift provision in line with the Design Principles into earlier intervention be endorsed;**
- 3. The intention to move into a 5 year agreement with London South East Academies Trust to provide relational and financial assurances to support their significant shift in provision (type and volume) in line with the 5 year commissioning plan be noted; and**
- 4. The principle of "money follows the child" as ratified by the Bromley Inclusion Partnership and agrees for the principle to be included in school funding agreements be endorsed.**

27 ANY OTHER BUSINESS

- (a) The Schools' Forum noted that the DfE had recently commenced a consultation around NNDR in relation to schools. Bromley's response to the consultation would be circulated to members of the Schools' Forum in due course for consideration and comment.
- (b) It had been agreed that there would be an annual review of both the Growth Fund and the Falling Rolls Fund to be scheduled for the Autumn meetings.
- (c) The Schools' Forum recognised the importance of electing a Vice-Chairman and volunteers for the role were sought.

28 DATE OF NEXT MEETING

It was noted that the next meeting would take place at 4.30pm on 24 June 2021.

The Meeting ended at 5.33 pm

Chairman

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Report No.
CEF21025

London Borough of Bromley

PART ONE - PUBLIC

Decision Maker: **SCHOOLS FORUM**

Date: **8th July 2021**

Decision Type: Non-Urgent Executive Non-Key

Title: **CEF PROVISIONAL OUTTURN REPORT 2020/21**

Contact Officer: David Bradshaw, Head of Finance, Children, Education and Families
Tel: 020 8313 4807 E-mail: David.Bradshaw@bromley.gov.uk

Chief Officer: Director, Children, Education and Families

Ward: (All Wards);

1. Reason for report

1.1 This report provides the CEF provisional outturn position for 2020/21.

2. **RECOMMENDATION(S)**

2.1 **The Schools Forum are invited to:**

(i) Note that the projected position of the CEF Portfolio.

Corporate Policy

1. Policy Status: Not Applicable
 2. BBB Priority: Health and Integration
-

Financial

1. Cost of proposal: Not Applicable:
 2. Ongoing costs: Not Applicable:
 3. Budget head/performance centre: ECF Portfolio
 4. Total current budget for this head: £59.663m
 5. Source of funding: CEF approved budget
-

Staff

1. Number of staff (current and additional): 1,115 Full time equivalent
 2. If from existing staff resources, number of staff hours: N/A
-

Legal

1. Legal Requirement: Statutory Requirement
 2. Call-in: Applicable
-

Customer Impact

1. Estimated number of users/beneficiaries (current and projected): The 2020/21 budget reflects the financial impact of the Council's strategies, service plans etc. which impact on all of the Council's customers (including council tax payers) and users of the services
-

Ward Councillor Views

1. Have Ward Councillors been asked for comments? Not Applicable
2. Summary of Ward Councillors comments:

3. COMMENTARY

3.1 This report provides an extract of the CEF Portfolio 2020/21 outturn position as reported to the Executive of the Council on the 30th June 2021.

3.2 Details are contained in Appendix 1

3.3 The Schools Forum are asked to note this report for information.

Non-Applicable Sections:	Legal Implications Financial implications Personnel Implications Customer Implications
Background Documents: (Access via Contact Officer)	2020/21 Budget Monitoring files in ECHS Finance Section

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Comments from the Director of Childrens Services

The Children, Education and Families Portfolio has an overspend of £125,000 for the year

The Education Division has an underspend of £131k. This is mainly to do with SEN transport and staffing costs.

The DSG overspend in year is £4,021k. This will be offset by the £1,733k carried forward from 2019/20. There is also an adjustment of £301k of additional income to the carry forward figure for Early Years Prior Year Adjustment. It was also agreed to use £252k of the brought forward balance to support the services in-year. It was also agreed to use the £1,100k of this years DSG allocation that was set aside to support future years pressures as pressures were emerging faster than anticipated. This gives us an estimated DSG deficit balance to be carry forward of £1,139k into the new financial year. It should be noted that the DSG can fluctuate due to pupils requiring additional services or being placed in expensive placements.

Officers are currently working on a recovery plan in advance of any expectation of such from the DfE and this plan will be considered in due course.

In Children's Social Care the overspend is £256k.

The ongoing impact of C19 on Children Services continues especially in respect of contacts into our MASH – these are currently running at around 1,000 contacts per month compared to around 600 in April 20. The result of pandemic in relation to backlog in family proceedings resulting in 104 children waiting outcomes. Many of these children's final care plans for permanency are either SGO or Adoption resulting in around 30 children who will come out of the system and would be closed to the LA. The fallout from this pandemic will continue for some considerable time to come particularly in relation to the increasing referral rate and complexity of the children coming into care. The increase in mental health and well being amongst young people has resulted nationally in increase in suicide and suicidal ideation and with the lack of CAMHS and adult mental health services the risk and support is falling to the Local Authority. We continue to see the significant impact on the most vulnerable families and our efforts to safeguard them but the cost of supporting them through the last year and what will inevitably be the ripple effect in 21/22. We continue to concentrate on ensuring that children are safeguarded throughout the current crisis and as we move forward over the next year to 18 months. Of course, if children come into the system and are unable to be reunified within 6 months the likelihood is that these young people will remain long term and move through to increase the numbers and cost as care leavers up until the age of 25 years. We are now back to business as usual in visiting families physically with very few virtual visits which usually occur if families are isolating. Staff adapted their ways of working and now they are physically visiting families they are able to assess more fully which is identifying the fragility of some families requiring support. Our Early intervention service for the first time ever has seen waiting lists and as such have pivoted to develop a light touch assessment for some families to ensure that they are supported, preventing crisis and routes into the statutory services. As stated cases progressing through courts continue to be delayed with final hearings being scheduled for the end of the year or into 2022 We currently have around 104 children within the court system. Courts continue to be cautious around final hearings as these too are heard virtually and often subsidiary orders are being made such as Supervision Orders which entails the LA continuing to offer resources but in addition manpower of a social worker for a year which results in increase caseloads – ordinarily such orders would be far less and alternative orders granted such as Family Assistance orders which last only 6 months. These cautious decisions leaves the LA (and children) in challenging situations and delaying permanency moves thus increasing the cost of placements.

Many of the families referred in recent months have not been known to the Local Authority before and is an indication of the impact of Covid where prior they would be reliant on families, friends, networks and community – such referrals are not light touch but many have resulted in immediate escalation through to the courts particularly where immobile babies and young children are being harmed.

There has been increased requests for support particularly in CWD and with slow opening of the respite provision managed by health partners this has increased demand on additional support packages to try and prevent children with complex disabilities entering the care system. One child entering the system can be at a conservative cost of 300 – 400K per year. We were cautious in relation to closing cases which was acknowledged as good practice by Ofsted, and where children in ordinary circumstances may have been removed from plans multi agency professionals and families have a heightened anxiety requesting the LA to remain involved. During the second wave as predicted this continued and whilst we review all cases regularly this is likely to continue until the summer 2021

However with the new variant taking hold families and children are again being exposed to further stresses and until all support and community services fully open and can offer not only a wide range of universal support but higher numbers in relation to group settings this will continue.

The risks in the Children, Education, & Families Portfolio are:-

- i) Recruitment and retention of permanent staff/ ability to recruit skilled staff for the posts vacant and competitive salaries being paid at this time
- ii) Limited supply and increasing costs of residential placements – including the specialist placements for very complex young people. For example Bromley has had in the last 2 years reduced its use of residential mother and baby placements but we have seen an increase in this area with the courts directing such placements which impacts on the cost of our placements budget . The cost of such placements is high and then with the delay to final hearing families are being retained in these placements beyond the assessment
- iii) Increase in the Looked After Population due to C19 and families being unable to cope.
- iv) Increased complexity of children (SEND).
- v) Impact of Social Work Act 2017 implementation.
- vi) Income from partner agencies being redeployed and reducing their contact with families leaving the LA solely responsible.
- vii) Long term closure of short breaks throughout 2020/21 resulting in demand and cost pressures.
- viii) Shortage of local school places.
- ix) Increasing High Needs Block expenditure not matched by a commensurate increase in Government Grant
- x) Continuing impact of 2014 Children and Families Act extending the age range to 25 for Education, Health and Care Plans.
- xi) Responsibility of Virtual School (VS) in relation to supporting any child adopted living within Bromley entitled to support – this support can be requested from families and schools and with the Covid this has increased significantly stretching the VS team

Children, Education and Families Portfolio Budget Monitoring Summary

2019/20 Actuals £'000	Service Areas	2020/21 Original Budget £'000	2020/21 Final Approved £'000	2020/21 Provisional Outturn £'000	Variation £'000	Notes	Variation Last Reported £'000	Full Year Effect £'000
PEOPLE DEPARTMENT								
Education Division								
Cr 350	Adult Education Centres	Cr 401	Cr 376	Cr 423	Cr 47	1	Cr 61	0
543	Schools and Early Years Commissioning & QA	715	715	644	Cr 71	2	Cr 90	0
8,206	SEN and Inclusion	6,597	6,949	6,827	Cr 122	3	263	0
74	Strategic Place Planning	103	103	126	23	4	0	0
8	Workforce Development & Governor Services	Cr 29	Cr 29	Cr 30	Cr 1		0	0
356	Access & Inclusion	156	156	202	46	5	2	0
Cr 1,243	Schools Budgets	Cr 1,528	Cr 1,528	Cr 1,416	112	6	0	0
10	Other Strategic Functions	717	217	146	Cr 71	7	Cr 12	0
7,604		6,330	6,207	6,076	Cr 131		102	0
Children's Social Care								
1,427	Bromley Youth Support Programme	1,526	1,533	1,313	Cr 220	8	0	0
920	Early Intervention and Family Support	1,178	1,187	856	Cr 331		Cr 64	0
6,580	CLA and Care Leavers	6,252	6,326	6,379	53		271	664
16,846	Fostering, Adoption and Resources	16,808	16,808	16,919	111		183	3,474
3,581	Referral and Assessment Service	3,410	3,315	3,377	62		12	0
2,943	Safeguarding and Care Planning East	2,768	2,664	2,956	292		21	0
5,163	Safeguarding and Care Planning West	5,389	5,255	5,377	122		61	0
1,071	Safeguarding and Quality Improvement Management Action	Cr 1,454	Cr 1,056	Cr 889	167		Cr 156	0
		0	0	0	0	Cr 60	0	
38,531		35,877	36,032	36,288	256		268	4,138
46,135	TOTAL CONTROLLABLE FOR CHILDREN, EDUCATION & FAMILIES	42,207	42,239	42,364	125		370	4,138
8,817	Total Non-Controllable	1,812	8,893	8,893	0		0	0
8,541	Total Excluded Recharges	8,693	8,531	8,531	0		0	0
63,493	TOTAL CHILDREN, EDUCATION & FAMILIES PORTFOLIO	52,712	59,663	59,788	125		370	4,138
Memorandum Item								
Sold Services								
37	Education Psychology Service (RSG Funded)	Cr 115	Cr 35	80	115	9	233	0
43	Education Welfare Service (RSG Funded)	Cr 24	Cr 28	Cr 4	24		6	0
8	Workforce Development (DSG/RSG Funded)	Cr 31	Cr 30	1	31		0	0
27	Community Vision Nursery (RSG Funded)	61	61	0	Cr 61		Cr 30	0
47	Blenheim Nursery (RSG Funded)	94	92	Cr 2	Cr 94		Cr 24	0
162	Total Sold Services	Cr 15	60	75	15		185	0

Reconciliation of Latest Approved Budget

£'000

Original Budget 2020/21

52,712

Contingency:

Tackling Troubled Families

- expenditure

348

- income

Cr 348

Carry forwards:

Delivery Support Fund

- expenditure

18

- income

Cr 18

Investing in Practise Grant

- expenditure

104

- income

Cr 104

Extension of Virtual Heads

- expenditure

34

- income

Cr 34

Reducing Parental Conflict

- expenditure

40

- income

Cr 40

Tackling Troubled Families

- expenditure

543

- income

Cr 543

Adult Education Match Funding

25

Expenditure on North Lodge

79

Other:

SEN Transport

363

R&M Planned - Blenheim Family Centre

22

Merit Reward

64

Contribution to Contingency

Cr 500

COVID-19 Grants

Contain Outbreak Management Fund

- expenditure

1,977

- income

Cr 1,977

COVID-19 Government Grant

- expenditure	4,405	
- income	Cr 4,405	
Income loss		
- expenditure	254	
- income	Cr 254	
Emergency Assistance Grant		
- expenditure	164	
- income	Cr 164	
Winter Grant		
- expenditure	667	
- income	Cr 667	
Holiday Activities and Food Grant		
- expenditure	81	81,330
- income	Cr 81	
Wellbeing for education		
- expenditure	39	
- income	Cr 39	

Memorandum Items:

Capital Charges	3,627	
Insurance	218	
Repairs & Maintenance	125	
IAS19 (FRS17)	3,112	
Excluded Recharges	Cr 161	
Rental Income	Cr 23	

Latest Approved Budget for 2020/21

59,663

REASONS FOR VARIATIONS

1. Adult Education - Cr £47k

The underspend in Adult Education is due to reduced activity that includes a reduction in the exam expenditure (£78k) and income (£51k) for the year. This is offset by additional staffing costs of £82k.

Due to the COVID-19 lockdown all of the training courses in the summer term were delivered online. Since the start of the new academic year most of the training courses have returned to the classroom with smaller class sizes. The small number of remaining courses are either delivered as blended or online courses.

2. Schools and Early Years Commissioning & QA - Cr £71k

Early Years Service has underspend on staffing of £38k.

There is a non-ringfenced government grant that has not been spent in full during the year that has led to a further underspend of £32k.

The remaining underspend relates to running costs of £1k.

3. SEN and Inclusion - Cr £122k

The SEN Transport has underspent by £715k. This is following an extra £363k added to the budget to support the anticipated extra costs of renewing the transport contracts from the start of the new academic year. COVID has had an effect on the service this year, as the routes have been intermittent due to lockdown restrictions throughout the year. As the service returns back to 'normal' it is expected that this variance will not continue going forward.

The Education Psychologists have made progress in recruiting to the vacant posts in their team. The use of agency staff during the year has caused both the statutory service they are required to provide to overspend by £18k and the Trading Service they offer to the Schools to overspend by £80k. This is a net overspend of £98k. The remaining overspend has resulted from increases in staffing and support roles due to the increases in EHCP's in year. Additionally there were overspends on various running costs (including contracts payments) of £99k. This was offset by a small over collection of income of £9k.

The remaining underspend relates to running costs of £2k.

4. Strategic Place Planning - Dr £23k

The overspend is due to various running cost overspends.

5. Access & Inclusion - Dr £46k

Access and Inclusion Service has an overspend of £46k during the year. This is due to an overspend on staffing of £84k, with a underspend on Mainstream pupil transport of £44k.

The remaining overspend relates to running costs of £6k.

6. Other Strategic Functions - Cr £71k

The service has underspent by £71k. This is due to an overspend of £93k in staffing costs, that has been offset by an underspend in running costs of £273k during the year.

Additional, there is an overspend of £109k on modular classroom rental costs.

7. Schools Budgets (no impact on General Fund)

Expenditure on Schools is funded through the Dedicated Schools Grant (DSG) provided by the Department for Education (DfE). DSG is ring fenced and can only be applied to meet expenditure properly included in the Schools Budget. Any overspend or underspend must be carried forward to the following years Schools Budget.

The DSG overspend in year is £4,021k. This will be offset by the £1,733k carried forward from 2019/20. There is also an adjustment of £301k of additional income to the carry forward figure for an Early Years Prior Year Adjustment. It was also agreed to use £252k of the brought forward balances to support the services in-year. It was also agreed to use the £1,100k of this years DSG allocation that was set aside to support future years pressures in year as the pressures were emerging faster than anticipated. This gives us an estimated DSG deficit balance to be carry forward of £1,139k into the new financial year. It should be noted that the DSG can fluctuate due to pupils requiring additional services or being placed in expensive placements.

The in-year overspend is broken down as follows:-

The in-year underspend on Early Years payments was £371k. This is split between the 2 years old funding (underspend of £70k) and 3 & 4 year old Funding (underspend of £301k).

There is currently projected to be an underspend of £83k in the Primary Support Team which is mainly due to staffing.

The Home and Hospital service has a projected overspend of £317k and this is mainly due to the need to use of agency staff to support the number of children being directly looked after by the team.

SEN placements has overspend by a total of £3,263k. These overspends are split as follows:-

Residential Placements - £366k

Top-Up Funding - £2,232k

Alternative Provisions - £665k

There is an overspend of £492k on the Schools Funding area for High Needs. This is for additional places at schools to prevent the need to place children in higher cost placements.

The Post 16 placements have overspend by £1,053k.

The High Needs Pre-school Service has underspend by £87k for the year which relates mostly to staffing.

The Darrick Wood Hearing Unit has overspent this year by £24k. Most of the overspend relates to additional staffing costs, but there is also a small amount that relates to running costs. This has been offset by underspends at SENIF, Sensory Support, and the Outreach & Inclusion Service are other areas across within SEN. The net effect of these cost centres is a £575k underspend.

There is also a small overspend of £12k in total.

	Variations £'000	High Needs £'000	Schools £'000	Early Years £'000	Central £'000
Free Early Education - 2 year olds	-70	0	0	-70	0
Free Early Education - 3 & 4 year olds (Inc. extr	-301	0	0	-301	0
Primary Support Team	-83	0	0	0	-83
Home & Hospital	317	317	0	0	0
Other Small Balances	5	0	2	0	3
SEN:					
- Placements & Alternative Programmes	1,031	1,031	0	0	0
- Top-Up Funding	2,232	2,232	0	0	0
- Support in FE colleges	1,053	1,053	0	0	0
- School Funding	492	492	0	0	0
- High Needs Pre-school Service	-87	-87	0	0	0
- Sensory Support	-68	-68	0	0	0
- SEN Inclusion Fund (SENIF)	-116	0	0	-116	0
- Darrick Wood Hearing Unit	24	24	0	0	0
- Outreach & Inclusion Service	-85	-85	0	0	0
- SEN Staff	-330	-330	0	0	0
- Other Small SEN Balances	7	8	0	0	0
Total	4,021	4,587	2	-487	-80

There will continue to be pressures in the DSG from 2021/22 onwards, especially in the High Needs Block. More children are coming through the system which will put additional pressure on DSG resources.

8. Children's Social Care - Dr £256k

The final budget variation for the Children and Families Division is an overspend of £256k. This is an decrease of £12k in the overspend reported previously which was £268k. Despite additional funding being secured in the 2020/21 budget, increases in the number of children being looked after together with the high cost of some placements has continued to put considerable strain on the budget.

Bromley Youth Support Programme - CR £220k

The underspend in this are is mainly due to the correction of the treatment to income that has meant extra income being realised in this years accounts resulting in an over collection of income of £250k. There is also an underspend on running costs of £20k. These underspends are offset by an overspend of £50k of staffing as additional support is going into the service as there is an anticipated inspection

Early Intervention and Family Support - Cr £331k

The underspend in this area of £331k relates to £140k underspend on staffing, £175k underspend on running costs (including premises and commissioning costs), and a small over collection of income (£16k).

CLA and Care Leavers - Dr £53k

The overspend in this area relates to Children Looked After placement support costs of £3k, accommodation costs of £17k and £55k on running costs that includes the cost of consultants. To offset this there is a £22k underspend on Staying Put.

Fostering, Adoption and Resources - Dr £111k

The final position for this area is an overspend of £111k. This is due to a net overspend of £2k across all of the various Residential, Fostering and Adoption Placements.

There is a £54k overspend on Regional Adoption Agency fees

Additional there are overspends of £55k on running costs

The budget for children's placements (Residential, Fostering and Adoption Placements) is projected to overspent this year, The analysis of this over the various placement types is shown below.

- Community Home's / Community Home's with Education - Cr £397k (Cr £870k)
- Boarding Schools - Dr £35k (Dr £94k)
- Secure Accommodation - Cr £272k (Cr £408k)
- Youth on Remand - Cr £697k (Cr £250k)
- Fostering services (IFA's) - Dr £1,443k (Dr £1,699k)
- Fostering services (In-house, including SGO's and Kinship) - Cr £23k (Cr £90k)
- Adoption placements - Cr £44k (Cr £44k)
- Transport and Outreach Services - Cr £43k (Dr £0k)

Referral and Assessment Service - Dr £62k

The overspend of £62k in this area that relates to support to families overspend of £11k and an overspend of £55k on running costs that This is being offset by an underspend of £4k on the subsistence and accommodation of NRPF.

Safeguarding and Care Planning East - Dr £292k

The overspend in this area of £292k relates PLO including pre-court assessments (£212k), support to families overspend of £25k and an overspend of £55k on running costs that includes the cost of consultants.

Safeguarding and Care Planning West- Dr £122k

The overspend in this area of £122k relates to a £44k overspend in Children's Disabilities Services, support to families overspend of £25k and an overspend of £53k on running costs that includes the cost of consultants regarding YOT and Ofsted.

Safeguarding and Quality Improvement - Cr £171k

This area has overspent by £171k and this is due to overspends of £91k on staffing and £80k on running costs including an increase in contribution to the BSCP and costs relating to the use of consultants for Ofsted review and preparation work.

9. Sold Services (net budgets)

Services sold to schools are separately identified in this report to provide clarity in terms of what is being provided. These accounts are shown as memorandum items as the figures are included in the appropriate Service Area in the main report.

Waiver of Financial Regulations

The Council's Contract Procedure Rules state that where the value of a contract exceeds £50k and is to be exempt from the normal requirement to obtain competitive quotations the Chief Officer has to obtain the agreement of the Director of Corporate Services, the Director of Finance and the Director of Commissioning and (where over £100,000) approval of the Portfolio Holder and report use of this exemption to Audit Sub-Committee bi-annually. Since the last report to the Executive, in Children's Social Care there were 7 waivers agreed for placements of between £50k and £100k, 2 between £100k and £150k, 1 between £150k and £200k and 10 for more than £200k.

Virements Approved to date under Director's Delegated Powers

Details of virements actioned by Chief Officers under delegated authority under the Financial Regulations "Scheme of Virement" will be included in financial monitoring reports to the Portfolio Holder. Since the last report to Executive, there have been no virements.

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Report No.
CEF21023

London Borough of Bromley

PART ONE - PUBLIC

Decision Maker: **Schools' Forum**

Date: **8th July 2021**

Decision Maker: **Children, Education and Families Policy Development and Scrutiny Committee**

Date: **14th September 2021**

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

TITLE: SPENDING BY PRIMARY, SECONDARY AND SPECIAL MAINTAINED SCHOOLS IN 2020/21

Contact Officer: Julie Crew, Schools Funding Manager
Tel: 020 8603 3573 E-mail: Julie.Crew@liberata.com

Chief Officer: Jared Nehra, Director of Education

Ward: Boroughwide

1. Reason for report

1.1 This report provides information on all revenue and capital balances held by Primary, Secondary and Special Maintained Schools as at 31 March 2021, and also provides a comparison to the balances held at the same time in the previous year.

2. **RECOMMENDATION(S)**

2.1 **The Committee is invited to consider the financial position of Primary, Secondary and Special Maintained Schools at the end of the 2020/21 financial year and to identify any matters for specific comment and referral to the Portfolio Holder.**

2.2 **The Schools' Forum is asked to note the balances for information.**

Corporate Policy

1. Policy Status: N/A
 2. BBB Priority: Children and Young People
-

Financial

1. Cost of proposal: N/A
 2. Ongoing costs: N/A
 3. Budget head/performance centre: Dedicated Schools Grant 2020/21
 4. Total current budget for this head:
 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: Non-statutory - Government guidance:
 2. Call in: n/a
-

Customer Impact

1. Estimated number of users/beneficiaries (current and projected) - N/A
-

Ward Councillor Views

1. Have Ward Councillors been asked for comments? No
2. Summary of Ward Councillors comments:

3. COMMENTARY

- 3.1 This report highlights the financial position of Primary, Secondary and Special Maintained Schools as at 31 March 2021 the end of the 2020/21 financial year.
- 3.2 Balances are reported in accordance with the DfE Consistent Financial Reporting (CFR) Regulations. This is the framework for reporting income and expenditure and balances. It provides schools with a benchmarking facility for comparison between similar schools to promote self-management and value for money. A CFR return is produced for all schools maintained by the Local Authority as at 31 March 2021
- 3.3 The CFR framework consists of five balances, which provide an overall picture of a school's resources available from one year to the next, and gives information on balances carried forward. The balances are categorised as follows:
- BO1 Committed Revenue Balances
 - BO2 Uncommitted Revenue Balances
 - BO3 Devolved Formula Capital Balances
 - BO5 Other Capital Balances
 - BO6 Community Focused Extended Schools Balances

To be noted, **BO4 Other Standard Fund Capital Balances** has been deleted as it related to Standards Funds which no longer exist.

The average level of revenue balances (BO1 and BO2) both committed and uncommitted for Maintained Primary School stands at 13% of School Budget Shares which represents an increase of 2% from the previous year. Secondary School balances have decreased from 5% to 4%. Special School balances have reported the highest increase moving from 8% to 13%.

- 3.4 There are seven Maintained schools remaining. These can be further split into 3 separate groups:-
- (i) There is one Community school. This is maintained by the Local Authority, but they have their own budgets and manage their own affairs. Religious education and worship is non-denominational and in accordance with an agreed syllabus.
 - (ii) There is one Voluntary Aided (VA) school. These were originally provided within the borough by voluntary bodies such as the Church of England and the Roman Catholic Church. These are now maintained by the Local Authority, but manage their own budgets and affairs. Religious education will conform to the agreed syllabus and to the school's trust deed. Voluntary Aided Schools set up by voluntary bodies continue to accept most of the costs of maintaining the school, and manage their own affairs. The Governors of the school exercise control over religious education and it will follow the teachings of the denomination set up within the school.
- 3.5 There are five Foundation schools. These have opted out of Local Authority control and the Governors have accepted full responsibility for running the school. Their funding comes via the Local Authority
- 3.6 A comparison of the levels of school balances as at 31 March 2021 compared to the previous year is shown in the table below.

	Primary Schools £000	Secondary Schools £000	Special Schools £000
Revenue balances only as at: 31.03.21			
Committed Revenue Balances (BO1)	191 (3%)	28 (0%)	182 (2%)
Uncommitted Revenue Balances (BO2)	724 (10%)	206 (4%)	1,116 (11%)
	916 (13%)	233 (4%)	1,298 (13%)
Revenue balances only as at: 31.03.20			
Committed Revenue Balances (BO1)	165 (3%)	0	140 (1%)
Uncommitted Revenue Balances (BO2)	570 (9%)	248 (5%)	552 (6%)
	735 (11%)	248 (5%)	692 (7%)

- 3.7 Full details of schools balances can be seen at **Appendix 1**
- 3.8 All schools with un-committed balances in excess of 8% have been asked to complete a pro-forma detailing the reason for holding a high balance and their plans for reducing the balance in year.
- 3.9 The DFE also require further analysis to be undertaken in relation to this data. LAs are required to provide information on how they are proposing to address the issue if an:
- A:** LA has overspent its Dedicated Schools Grant by 2% or more (i.e. it is 2% or more in deficit)
 - B:** LA has underspent its Dedicated Schools Grant by 5% or more (i.e. it is 5% or more in surplus)
 - C:** LA has 2.5% of its schools that have been in deficit of 2.5% or more for the last 4 years and their individual deficit must have been at least £10,000 each year. We will only ask LAs for more information where at least three schools in the LA meet the criteria
 - D:** LA has 5% of schools that have had a surplus of 15% or more for the last 5 years and their individual surplus must have been at least £10,000 each year. LAs will only be asked for more information where at least three schools in the LA meet the criteria.

Schools that would fall into these categories have been highlighted on the table at **Appendix 2** – for 2020/21 none of the schools fall into this category. ...

- 3.10 This report also provides information on those schools with a deficit revenue balance. As at 31 March 2021, there were no schools with a deficit balance.
- 3.11 In accordance with DfE requirements the SFT will work with schools with high balances to ensure that they are being used effectively. Schools are advised that revenue funding is allocated on an annual basis to support the cost of education for their current pupils and therefore it is not acceptable for schools to retain high levels of revenue funding to protect against possible funding reductions in future years.
- 3.12 Those schools with high balances have been requested to provide evidence of future expenditure to justify high balances.

4. FINANCIAL IMPLICATIONS

4.1 Whilst this report provides details of school balances, there are no financial implications to be considered.

Non-Applicable Sections:	Policy, Legal and Personnel Implications
Background Documents: (Access via Contact Officer)	

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	2020-21									2019-20			
	BO1 Committed Revenue Balances	BO2 Uncommitted Revenue Bal 31/03/2021	B02 Rev Bal as % of 2020/21 SBS	BO1 & B02 Rev Bal as % of 2020/21 SBS	School Budget Share 2020-21	BO3 Devolved Formula Cap Balances	BO5 Other Capital Balances	BO6 Community Focussed Ext Schools	Total Balance C/fwd as at 31-Mar-21	BO1 Committed Revenue Balances	BO2 Uncommitted Revenue Bal 31/03/2020	B02 Rev Bal as % of 2019/20 SBS	BO1 & B02 Rev Bal as % of 2019/20 SBS
	£	£			£	£	£	£	£	£	£		
Primary Schools													
Downe Primary	0	55,155	10%	10%	569,497	6,792	0	0	61,947	0	80,515	16%	16%
Edgebury Primary	0	268,012	16%	16%	1,664,871	10,773	0	0	278,785	0	205,265	14%	14%
Poverest Primary	137,497	196,000	7%	13%	2,632,918	12,037	0	0	345,533	158,368	107,647	4%	11%
Southborough Primary	53,992	204,853	9%	12%	2,185,858	19,034	0	0	277,879	7,158	176,526	9%	9%
Sub-total	191,489	724,020	10%	13%	7,053,144	48,635.84	0	0.00	964,145	165,526	569,953	10%	11%
Secondary Schools													
St. Olaves	27,714	205,501	4%	4%	5,549,512	0	0	0	233,215	0	247,820	5%	5%
Sub-total	27,714	205,501	4%	4%	5,549,512	0.00	0	0.00	233,215	0	247,820	5%	5%
Special Schools													
Marjorie McClure	181,829	250,145	9%	15%	2,844,673	24,447	0	0	456,421	139,980	128,649	5%	10%
Riverside		865,695	12%	12%	7,180,028	0	31,473	0	897,168	0	422,988	6%	6%
Sub-total	181,829	1,115,839	11%	13%	10,024,701	24,447	31,473	0.00	1,353,589	139,980	551,637	6%	8%
TOTAL	401,032	2,045,361	9%	11%	22,627,358	73,083	31,473	0	2,550,948	305,506	1,369,410	6%	7%

	2020-21		2019-20		2018-19		2017-18		2016/17		2015/16		2014/15	
	BO1 & B02	BO1 & B02	BO1 & B02	BO1 & B02	BO1 & B02	BO1 & B02	BO1 & B02	BO1 & B02	BO1 & B02	BO1 & B02	BO1 & B02	BO1 & B02	BO1 & B02	BO1 & B02
	Combined	Rev Bal	Combined	Rev Bal	Combined	Rev Bal	Combined	Rev Bal	Combined	Rev Bal	Combined	Rev Bal	Combined	Rev Bal
	Rev Bal	as %	Rev Bal	as %	Rev Bal	as %	Rev Bal	as %	Rev Bal	as %	Rev Bal	as %	Rev Bal	as %
		of 2020/21		of 2020/21		of 2019/20		of 2018/19		of 2017/18		of 2016/17		of 2015/16
		SBS		SBS		SBS		SBS		SBS		SBS		SBS
Primary Schools														
Downe Primary	55,155	10%	£80,515	16%	£53,290	11%	£28,224	6%	£658	0%	£28,224	6%	£21,322	4%
Edgebury Primary	268,012	16%	£205,265	14%	£185,736	15%	£76,655	7%	£82,699	8%	£76,655	7%	£165,309	16%
Poverest Primary	333,496	13%	£266,015	11%	£235,349	14%	£204,820	13%	£248,163	18%	£204,820	13%	£234,088	12%
Southborough Primary	258,845	12%	£183,684	9%	£163,263	9%	£144,077	8%	£179,247	10%	£144,077	8%	£149,406	8%
Secondary Schools														
St. Olaves	233,215	4%	£247,820	5%	£3,267	0%	£361,248	7%	£500,677	10%	£361,248	7%	£460,919	9%
Special Schools														
Marjorie McClure	431,974	15%	£268,629	10%	£226,972	9%	£201,536	8%	£173,576	7%	£201,536	8%	£136,847	2%
Riverside	865,695	12%	£422,988	6%	£501,166	8%	£564,502	9%	£431,123	8%	£564,502	9%	£354,630	7%

Report No.
CEF21024

London Borough of Bromley

PART ONE - PUBLIC

Decision Maker: **SCHOOLS FORUM**

Date: **8th July 2021**

Decision Type: Non-Urgent Executive Non-Key

Title: **FALLING ROLLS FUND 2021/22**

Contact Officer: Julie Crew, Schools Funding Manager
Tel: 020 8603 3573 E-mail: Julie.Crew@liberata.com

Chief Officer: Jared Nehra, Director of Education

Ward: (All Wards);

1. Reason for report

1.1 This report provides the information on the levels of use of the falling rolls fund.

2. RECOMMENDATION(S)

2.1 The Schools Forum are requested to:

- (i) Agree the Falling Rolls funding for 2021-22 subject to further clarification from the appropriate schools.**
- (ii) Note that the decision for final release of any funding rests with the Director of Education once the final evidence has been obtained from Schools.**

Corporate Policy

1. Policy Status: Not Applicable
 2. BBB Priority: Health and Integration
-

Financial

1. Cost of proposal: Not Applicable:
 2. Ongoing costs: Not Applicable:
 3. Budget head/performance centre: ECF Portfolio
 4. Total current budget for this head: £170k
 5. Source of funding: CEF approved budget
-

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
 2. Call-in: Applicable
-

Customer Impact

1. N/A
-

Ward Councillor Views

1. Have Ward Councillors been asked for comments? Not Applicable
2. Summary of Ward Councillors comments:

3. COMMENTARY

3.1 The Council updates its projections on the need for school places annually through its School Place Strategy. Future forecasts are mainly based upon the GLA School Roll Projections, although the Council has developed its own model to complement the GLA for forecasting secondary need.

3.2 The current terms of the fund are as follows:

Part A

- Support is available only for schools judged Good or Outstanding at their last Ofsted inspection (this is a mandatory requirement)
- Surplus capacity exceeds 20% of the published admission number (PAN)
- No funding to be paid where schools are already being supported through the existing growth fund or to free schools which are funded on estimated pupil numbers.

Part B

- Local planning data shows a requirement for at least 80% of the surplus places in the next 3 years
- Formula funding available to the school will not support provision of an appropriate curriculum for the existing cohort – school to provide copy of 3-year budget data to support this
- The school will need to make redundancies in order to contain spending within its formula budget – school to provide evidence of formal discussions at governing body level to support this
- To be funded at the AWPU value per vacant place, up to a specified maximum number of places equivalent to 80% of PAN

3.3 Based on the information provided, LA Officers have looked at all schools' reception class intakes. Taking into account the schools PAN a comparison has been made on the number of schools who may meet the criteria of the current Falling Rolls Fund in the October 2020 school census

3.4 Currently there are 3 schools that meet all of the criteria for funding in Part A. The cost to DSG funding for falling rolls 2021-22 is potentially £20,382.

3.5 Officers will now gather the appropriate evidence from the schools in Part B above. If the Schools can evidence this sufficiently then the funding will be passed to the Schools. The Director of Education will give the final agreement to any payments being made

Future Falling Rolls funding/payments

3.6 The Primary application and offer data for September 2021 intake shows that there were 389 vacant reception places across the borough – this varies from one or two vacancies across a large number of schools to vacancies of over 20 places in some individual schools.

3.7 Based on this data it is likely that the call on the Falling rolls fund will increase for 2022/23

3.8 This report provides the falling rolls data and cost to DSG 2021-22 which is broken down in detail in Appendix 1.

4. FINANCIAL IMPLICATIONS

4.1 The financial implications are in the body of the report.

Non-Applicable Sections:	Legal Implications Policy Implications Personnel Implications Customer Implications
Background Documents: (Access via Contact Officer)	Documents held with Liberata Finance

Summary Form - Pupils in Primary Schools - Autumn Term 2020													
National Curriculum Year	Year 6	Year 5	Year 4	Year 3	Year 2	Year 1	Reception Year	PAN	Vacant Places	% Vacant Places	Number to be Funded	AWPU	
Year of Birth (Sept-Aug)	(10+) 2009-2010	(9+) 2010-2011	(8+) 2011-2012	(7+) 2012-2013	(6+) 2013-2014	(5+) 2014-2015	2015-2016						
School	Total												
Alexandra Infant	0	0	0	0	58	58	60	176	60	0	0%	-	-
Balgowan Primary	125	93	91	91	87	90	87	664	90	3	3%	-	-
Bickley Primary	60	60	56	55	58	60	60	409	60	0	0%	-	-
Biggin Hill Primary	54	54	51	63	56	49	60	387	60	0	0%	-	-
Blenheim Primary	41	27	28	30	29	30	30	215	30	0	0%	-	-
Burnt Ash Primary	55	55	58	58	55	55	58	394	60	2	3%	-	-
Castlecombe Primary	35	38	39	44	29	44	49	278	60	11	18%	-	-
Chelsfield Primary	14	9	14	14	9	16	14	90	16	2	13%	-	-
Churchfields Primary	49	52	59	54	57	87	90	448	90	0	0%	-	-
Clare House Primary	64	61	63	60	56	60	60	424	60	0	0%	-	-
Crofton Infant	0	0	0	0	180	180	180	540	180	0	0%	-	-
Cudham Church of England Primary	11	13	8	12	12	13	12	81	15	3	20%	-	-
Darrick Wood Infant	0	0	0	0	90	91	89	270	90	1	1%	-	-
Dorset Road Infant	0	0	0	0	13	3	1	17	30	29	97%	23	-
Downe Primary	8	17	12	12	4	12	10	75	15	5	33%	2	6,794
Edgebury Primary	30	32	63	59	59	57	61	361	60	-1	-2%	-	-
Farnborough Primary	29	58	60	32	30	30	29	268	30	1	3%	-	-
Gray's Farm Primary (nursery)	55	50	53	58	57	58	60	391	60	0	0%	-	-
Green Street Green Primary (+)	59	60	61	55	55	60	59	409	60	1	2%	-	-
HPA Beckenham	0	58	57	58	50	59	60	342	60	0	0%	-	-
HPA Beckenham Green	28	30	25	20	29	30	25	187	30	5	17%	-	-
HPA Crystal Palace (nursery)	57	54	51	52	55	54	58	381	60	2	3%	-	-
HPA Kent House(nursery)	46	58	43	54	56	58	60	375	60	0	0%	-	-
HPA Orpington (+)	53	55	41	48	48	46	34	325	60	26	43%	14	Growth Funded
HPA Shortlands	47	55	56	50	57	57	59	381	60	1	2%	-	-
Hawes Down Primary (+)	63	64	63	57	53	60	60	420	60	0	0%	-	-
Hayes Primary	91	94	92	92	90	90	86	635	90	4	4%	-	-
Highfield Infant	0	0	0	0	88	89	90	267	90	0	0%	-	-
Holy Innocent's Catholic Primary	31	32	30	31	30	30	29	213	30	1	3%	-	-
James Dixon Primary (+) (nursery)	58	68	43	51	56	57	60	393	60	0	0%	-	-
Keston Church of England Primary	22	29	28	28	26	21	25	179	30	5	17%	-	-
La Fontaine	37	52	46	51	60	76	84	406	90	6	7%	-	-
Langley Park Primary School	0	0	51	46	58	53	58	266	60	2	3%	-	-
Leesons Primary	58	51	53	58	39	41	51	351	60	9	15%	-	-
Manor Oak Primary (+)(nursery)	28	28	26	28	28	20	22	180	30	8	27%	2	6,794
Marian Vian Primary	88	123	94	89	88	90	79	651	90	11	12%	-	-
Mead Road Infant	0	0	0	0	18	30	29	77	30	1	3%	-	-
Midfield Primary (+) (nursery)	58	57	58	59	61	56	60	409	60	0	0%	-	-
Mottingham Primary (+)	48	51	46	48	34	42	46	315	60	14	23%	2	6,794
Oak Lodge Primary	95	89	90	87	73	77	89	600	90	1	1%	-	-
Oaklands Primary	79	82	65	66	59	70	72	493	90	18	20%	0	-
Parish Church of England Primary	88	82	83	89	88	90	90	610	90	0	0%	-	-
Perry Hall Primary	64	62	64	63	60	60	60	433	60	0	0%	-	-
Pickhurst Infant	0	0	0	0	118	119	120	357	120	0	0%	-	-
Poverest Primary (+)	58	54	60	59	59	60	61	411	60	-1	-2%	-	-
Pratts Bottom Primary	12	14	13	12	12	7	10	80	12	2	17%	-	-
Raglan Primary (+)	58	56	58	59	58	57	62	408	60	-2	-3%	-	-
Red Hill Primary	97	110	110	107	87	84	89	684	90	1	1%	-	-
Scotts Park Primary	77	76	59	53	52	60	52	429	60	8	13%	-	-
Southborough Primary	52	61	51	58	54	60	60	396	60	0	0%	-	-
St Anthony's Roman Catholic Primary	18	27	20	26	18	25	30	164	30	0	0%	-	-
St George's, Bickley, Church of England Primary	57	59	56	54	60	60	60	406	60	0	0%	-	-
St James' Roman Catholic Primary	32	32	32	32	31	30	30	219	30	0	0%	-	-
St John's Church of England Primary	27	20	30	32	17	25	29	180	30	1	3%	-	-
St Joseph's Roman Catholic Primary	32	29	31	30	30	29	28	209	30	2	7%	-	-
St Mark's Church of England Primary	61	47	54	55	52	52	58	379	60	2	3%	-	-
St Mary's Catholic Primary	59	61	60	58	59	59	61	417	60	-1	-2%	-	-
St Nicholas CE Primary School	32	32	32	32	30	30	30	218	30	0	0%	-	-
St Paul's Cray Church of England Primary (nursery)	42	25	28	32	37	33	26	223	30	4	13%	-	-
St Peter & St Paul Catholic Primary	34	32	33	32	30	30	30	221	60	30	50%	18	Growth Funded
St Philomena's Roman Catholic Primary	28	29	31	30	27	29	29	203	30	1	3%	-	-
St Vincent's Catholic Primary	32	32	34	29	30	30	31	218	30	-1	-3%	-	-
St Mary Cray Primary	28	24	26	30	29	49	30	216	30	0	0%	-	-
Stewart Fleming Primary	82	84	55	58	57	59	89	484	60	-29	-48%	-	Growth Funded
The Highway Primary	30	31	32	32	30	31	30	216	30	0	0%	-	-
Trinity CofE Primary School (+) (nursery)	41	50	44	38	41	45	50	309	60	10	17%	-	-
Tubbenden Primary	94	93	89	88	90	90	89	633	90	1	1%	-	-
The Unicorn Primary	96	66	66	60	60	59	60	467	60	0	0%	-	-
Valley Primary	60	56	57	60	88	57	60	438	60	0	0%	-	-
Warren Road Primary	119	120	118	120	119	120	119	835	120	1	1%	-	-
Wickham Common Primary	61	64	55	52	59	61	60	412	60	0	0%	-	-
Worsley Bridge Junior	45	56	47	50	51	66	82	397	90	8	9%	-	-
Totals	3,292	3,393	3,302	3,300	3,783	3,925	4,020	25,015					
								<u>208</u>	<u>20,382</u>				

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