

Schools Forum

**7 December 2011
4.00pm**

Conference Room 2,
North London Business Park

Agenda, Papers and
Minutes of the last meeting

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AGENDA

Meeting to start at 4pm with no training session

1. Apologies for absence
2. Declarations of interest
3. Minutes of previous meeting: 10 October 2011
4. Matters arising
5. Actions from previous meeting
6. Items for Decision
 - 6.1. *Outcome of Barnet's Funding Consultation – Carol Beckman*
 - 6.2. *Funding for infant classes with more than 31 on roll – Carol Beckman*
7. Items for Consultation
 - 7.1. *Council Budget – Val White*
8. Items for Information
 - 8.1 *Announcements from the DfE – Carol Beckman*
 - 8.2 *2011/12DSG projected outturn – Kerry-Anne Smith*
9. Any Other Business

SCHOOLS FORUM MEMBERS

Sector	Position	Name	School	Member Until
Nursery Schools (1)	Headteacher	Jane Chew	St Margaret's	07 Dec 2013
Primary Schools (11)	Community – Headteacher 1	Jeanette Adak	Monkfrith	30 Sep 2013
	Community – Headteacher 2	Helen Schmitz	Cromer Road	30 Sep 2013
	Community – Headteacher 3	Susan Convery	Whitings Hill Primary School	30 Sep 2014
	Community – Headteacher 4	Sally Lajalati	Collindale	30 Sep 2014
	Community – Governor 1	Liz Pearson	Holly Park & Livingstone	30 Sep 2013
	Community – Governor 2	Kim Garrod	Church Hill	07 Dec 2013
	Community – Governor 3	Catrin Dillon	Martin Primary	07 Dec 2013
	VA – Headteacher 1	Clare Neuberger	Menorah Foundation	30 Sep 2013
	VA – Headteacher 2	Dee Oelman	St Mary's & St John's	30 Sep 2013
	VA – Headteacher 3	Tim Bowden	Holy Trinity	30 Sep 2013
	VA – Governor	Anthony Vourou	St John's N11	30 Sep 2013
Foundation / VA Governor	Janet McIntyre	Christ Church CE	30 Sep 2014	
Secondary Schools (8)	VA – Headteacher 2	Seamus McKenna	Finchley Catholic	31 Nov 2013
	VA – Governor	Patricia French	St Mary's High	07 Dec 2013
	Community/ Foundation / Trust – Headteacher	<i>Vacant</i>		31 Nov 2013
	Foundation / Trust – Governor	Andrew Macalpine	Hendon	01 Feb 2014
Special Schools	Governor	Gilbert Knight (Chair)	Oakleigh	30 Sep 2013
	Headteacher	Jenny Gridley	Oakleigh	30 Sep 2013
Academies	Academy / Principal	Michael Whitworth	Wren Academy	30 Nov 2013
	Academy / Principal	Angela Trigg	London Academy	30 Sep 2013
	Academy / Principal	Kate Webster	Queen Elizabeth Girls	30 Sep 2013
	Academy / Principal	Paul Ferrie	The Totteridge Academy	30 Sep 2013
	Academy / Principal	Geoffrey Thompson	Mill Hill High	30 Sep 2013
Stake-holders	14-19 Partnership	Keith Murdoch	Woodhouse	30 Sep 2013
	Private Early Years	Sarah Vipond	Middlesex Uni	30 Sep 2013
	Unions	<i>Vacant</i>		
	Stakeholder	Shelley Dannell		
Non Voting Observers	Cabinet Member for Children	Cllr Andrew Harper	Deputy Leader	
	Director of Children's Service	Robert Mc-Culloch Graham	Children's Service	
	Consultant to Schools Forum	Geoff Boyd	Consultant	
Barnet Officers	Deputy Chief Executive	Andrew Travers	Finance Directorate	
	Assistant Director	Val White	Children's Service	
	Assistant Director, Schools and Learning	Mick Quigley	Children's Service	
	Principal Education Psychologist	Brian Davis	Children's Service	
	School Funding Manager	Carol Beckman	Finance Directorate	
	Schools Finance Services Manager	Nick Adams	Finance Directorate	
	Head of Finance	Kerry-Anne Smith	Finance Directorate	
	Clerk and minutes	Mark Callaghan	Finance Directorate	

4. MINUTES OF THE LAST MEETING (14 July)

Meeting of the Schools Forum

Monday 10 October 2011

(4.00 pm, Sapphire Room, The Emerald Suite, NLBP)

Attended

Members: Jane Chew (St Margaret's Nursery)
Susan Convery (Head, Whittings Hill)
Shelley Dannell (Head, Pavilion Pupil Referral Unit)
Paul Ferrie (Head, The Totteridge Academy)
Patricia French (Governor, St Mary's High)
Kim Garrod (Governor, Church Hill Primary School)
Jenny Gridley (Head, Oakleigh)
Gilbert Knight (Governor, Oakleigh)
Janet McIntyre (Chair, Christ Church)
Seamus McKenna (Head, Finchley Catholic)
Keith Murdoch (Principal, Woodhouse College)
Clare Neuberger (Head, Menorah Foundation)
Geoffrey Thompson (Head, Mill Hill High)
Angela Trigg (Principal, London Academy)
Jeremy Turner (Head, Friern Barnet)
Anthony Vourou (Governor, St John's N11)
Kate Webster (Head, QE Girls)

LA Officers: Nick Adams (Schools Finance Services Manager)
Carol Beckman (School Funding Manager)
Anisa Darr (Finance Manager)
Brian Davis (Principal Education Psychologist)
Robert McCulloch-Graham (Director of Children's Service)
Mick Quigley (Assistant Director Schools and Learning)
Val White (Assistant Director, PPP)
Keith Nason (NUT)

Consultant: Geoff Boyd (Independent Consultant)

Clerk: Mark Callaghan (School Resources and Support Officer)

Not Present

Members: Jeanette Adak (Head, Monkfrith)
Tim Bowden (Head, Holy Trinity)
Catrin Dillon (Governor, Martin Primary)
Jayne Franklin (Head, Childs Hill)
Sally Lajalati (Head, Collindale)
Andrew Macalpine (Governor, Hendon School)
Dee Oelman (Head, St Mary's & St John's)
Elizabeth Pearson (Governor, Livingstone)
Helen Schmitz (Head, Cromer Road)
Michael Whitworth (Principal, Wren Academy)
Sarah Vipond (Early Years Working Group)

LA Officers: Kerry-Anne Smith (Joint Head of Finance Children's & Adults)
Andrew Travers (Deputy Chief Executive)

Other: Cllr Andrew Harper (Cabinet Member for Education, Children & Families)

1. Welcome and apologies for absence	
<p>Apologies for absence were received from Jeanette Adak, Tim Bowden, Catrin Dillon, Sally Lajalati, Dee Oelman, Liz Pearson, Helen Schmitz, Kerry-Anne Smith and Sarah Vipond.</p> <p>GK welcomed new members Janet McIntyre, Susan Convery, Sally Lajalati and Jeremy Turner to the Forum.</p> <p>GK advised that Keith Nason from NUT is in attendance at the meeting to represent unions until a union member is appointed to replace Alan Homes.</p>	
2. Election of Chair and Vice Chair	
<p>CB explained the procedure for election of Chair and Vice-chair to the group.</p> <p>RMG requested nominations for Chair. KG nominated GK, seconded by AV. GK accepted the nomination for the position of Chair and was elected unopposed.</p> <p>GK requested nominations for vice chair. KW nominated PF, seconded by AT. PF accepted the nomination for the position of Vice-Chair and was elected unopposed.</p>	
3. Declarations of Interest	
<p>No declarations were received.</p>	
4. Minutes of previous meeting: 14 July 2011	
<p>The minutes were agreed as a true and accurate record of the meeting.</p>	
5. Matters arising (not occurring elsewhere on the agenda)	
<p>No issues were raised.</p>	
6 Actions from previous meeting	
<p>GK updated the Forum on actions from the previous meeting:</p> <ul style="list-style-type: none"> • A letter of thanks to Linda Parker for her contribution on the Schools Forum was sent from GK on 7 October 2011. • The first Schools Forum training session took place on 20 October 2011 and a second session has been scheduled for 21 November 2011. GK thanked the local authority for arranging the training, noting that feedback from the first session was excellent. • MC emailed the Forum the link to the page of the website where information on school contracts is held. • There is now one Free School in Barnet and the Terms of Reference will be amended to reflect this. 	

7 ITEMS FOR DECISION

7.1 Schools Budget 2011/12 – distribution of additional funding

Carol Beckman

CB explained that the additional funding of £1.6m has resulted from a change in the way the number of three year olds is calculated by the DfE and is money that the local authority did not expect to receive. The local authority was notified about the additional funding the day before the July meeting. It was therefore not possible to take options to the last meeting.

CB presented an options paper to the Forum for the inclusion of the additional funding into the Schools Budget, clarifying that the sum is not sufficient to avoid a breach of the CEL for 2011/12.

If the money is placed into the contingency fund (option A), this may result in the DfE top-slicing some of the money in 2012/13 for academy funding. In a letter received by the local authority last week from the DfE, it was announced that recoupment for academies though the LACSEG will now include the contingency line. Barnet intends to appeal this as, in Barnet, academies can access funding for services provided from the contingency fund such as SEN and new school places. Option B shares the money between the centrally retained budget and the Individual Schools Budget (ISB) and option C delegates all of the funding to the ISB.

CB summarised the distribution methods for the funding if options B or C are preferred. Although the money generated was associated with the 'three year old top-up', it would not be fair to allocate it all to the nursery sector as the money was originally divided without reference to the source of income.

GK stated that when this was discussed previously it was agreed that any excess funding should be distributed to schools, therefore option C would seem the most appropriate. GT stated that the funding should be distributed in the same way as it would have if it had been included in the original budget allocation. CB clarified that option 1 is the closest measure to this i.e. the AWPU.

GK asked the group to vote to indicate how the Forum felt the additional funding should be included in the Schools Budget:

Option A: 0 votes
Option B: 0 votes
Option C: 16 votes

GK asked the group to vote to indicate which distribution method within the ISB was preferred by the Forum:

Option 1: 14
Option 2: 0
Option 3: 2
Option 4: 0

The Forum favoured Option C to delegate all of the additional funding into the ISB via distribution method 1.

8 ITEMS FOR CONSULTATION

8.1 Barnet funding formula consultation

Carol Beckman

CB presented an addendum to a consultation report issued the previous week, which highlighted the changes for schools and re-phrased the final questions of the consultation to improve clarity.

The paper was presented to the Forum for approval to proceed with the consultation with all schools. It was not for decision about the individual proposals at this stage. The consultation presents options to bring Barnet's funding formula a step closer to the centralised funding model which the government is moving towards.

RMG advised that he is on the Task and Finish group alongside Children's Service Directors from other local authorities. The government's current intention is for a new funding agency to replace the Young People's Learning Agency (YPLA) and it is likely that this will be part of the DfE. Children's Service Directors on the group have been arguing for some degree of local determination and that the Schools Forum would be the appropriate way to provide this.

VW attended the last meeting of the Task and Finish Group and stated that Schools Forums will still very much be in the picture in 2012. The proposals for changes to Barnet's funding formula for next year paper is a step towards simplification. Schools and the local authority should view 2012/13 as a transition year with the aim of simplifying a formula which currently has a large number of funding factors.

CB summarised the proposals in the paper advising that the consultation will be issued to all Barnet schools. The proposals in the first 6 questions are straight forward. There were no comments from the Forum on these proposals.

Questions seven and eight relate to Standards Funds which equate to about £30m of the ISB. This is complicated as many of the Standards Funds are aimed at sixth form students and continuing to fund schools on this basis would mean that those with sixth forms would receive this in addition to their YPLA funding. At this stage it is not proposed to remove this element. Similarly former standards funds benefit nursery classes over private early years providers. This again is an issue which will need resolving at a later stage with the advice of the DfE

PFR asked what the column titled Post LIG refers to in the spreadsheet distributed. CB advised that this was the Leadership Incentive Grant, an historic grant.

CB explained that the Transition column of the spreadsheet displays the amount of money that would be required to add or subtract to bring each school budget within plus or minus £1000 of the current 2011/12 former standards funds budget.

CB clarified that the Forum was being asked if the Forum is happy for the consultation to be issued to all Barnet's schools this week.

PF asked for clarification that the proposals would be implemented in the 2012/13 schools budget. CB confirmed that this is correct, but that the former Standards Funds will be restated in 2011/12 so that schools will be able to see how their allocation would have been calculated under the new formula.

JM asked for clarification that where the Standards Funds Transition column on the spreadsheet is negative the school will eventually be slightly better off than now. CB confirmed that this is the case.

PF noted that a 4 week consultation period was short as half-term occurred within the period. CB said a longer period would be desirable, but is not possible as the results need to be collated and published in advance of the next Forum meeting.

GK asked the Forum members whether they were happy to approve the proposals.

All Forum members agreed in favour of the consultation going ahead as presented.

8.2 Children's Service budget proposals for 2012/13 – informal consultation | Val White

VW briefed the Forum on the Children's Service budget proposals for 2012/13 advising that an informal consultation period has now started. In 2011/12 the Children's Service reduced its budget by £6.4m and made an investment of £2.5m. The budget savings for 2012/13 will be £1.044m and are the same as proposed in the medium-term financial strategy published last year. The budget report will go to cabinet in November 2011, followed by a formal consultation. A report will then come back to the Schools Forum.

VW summarised the key savings areas:

1. Further savings in youth services of £500K. This is in addition to the large saving made last year. The aim is to move towards being an enabler of services with a reduction in the local authority's role as a direct provider of services. The local authority is also looking at investing to support the voluntary sector and other providers through for example, a shared equipment store and administering CRB checks for voluntary organisations.
2. A reduction of £100k in the Child and Adolescent Mental Health Service (CAMHS) commissioning budget.
3. Corporate parenting support savings of £100K by reconfiguring back office services.
4. Adoption allowances savings of £110K. This will be achieved by making sure all payments are reviewed to ensure that they are correct as well as looking at allowances for new adopters.

AT asked whether any work has been done on the impact of the cuts from the 2011/12 budget. VW advised that work is being done to assess impact but it is too early yet to see any impact through performance indicators etc. KW raised concern that the cut in the CAMHS budget is contrary to the early intervention strategy advocated by the borough last year. RMG advised that reductions in funding may also have to come from the Primary Care Trust's budget. They currently fund jointly fund CAMHS services.

KW stated that her school has had a level of service taken away without being informed what will replace it. VW stated that some CAMHS services historically funded through early intervention and prevention funding are being de-commissioned as the service was not successful in a recent commissioning round of tendering.

KW asked where the route is into CAMHS provision for schools and how do schools make sure that they are getting best value for money. There are occasions where a headteacher is informed that CAMHS will not be available for six weeks when they know that the child in question will do something in that time which could lead to permanent exclusion. BD explained that there is a clear link between CAMHS and schools and the relationship between the local authority and CAMHS is currently undergoing a restructure, the local authority is looking at improving and reshaping services along evidence based lines. In response to a concern about schools purchasing CAMHS services, BD confirmed that schools have always had the option to buy into CAMHS services directly.

RMG advised that funding for CAMHS has always been a partnership with the PCT and the arrangements about which partner pays for which element varies between different local authorities. The council has to reduce its budgets in excess of 25 percent over four years. RMG reported that questions around reducing funding for early intervention are being raised increasingly frequently, but most children's services are early intervention. There are significant pressures on statutory services, the Children's Service recently had to employ extra social work support in order to fulfil child protection plans. RMG noted the local authority and schools share the responsibility for looking after Barnet's children and that for the meanwhile, schools funding is being protected nationally. Although there is a £1m cut in the Children's Service budget for 2012/13, the local authority is doing everything it can to minimise the impact of cuts. It is important to prepare for budget cuts and look at how economies of scale can be utilised to improve provision via cross service working.

KN asked whether the £100K reduction in the CAMHS is coming out of the local authority or the PCT element of the budget and whether any local authority cuts are being made with the knowledge of what the PCT will do. VW advised that we now have a shared post occupied by Vivienne Stimpson, with the PCT so the working relationship and information sharing on budget pressures and savings is improving.

PF stated that we now have an opportunity in terms of reshaping services to involve partners six months in

advance to ensure that the best provision is available, whereas last year the main concern was around job losses. RMG noted that PF's comments were very helpful and encouraging. A group of headteachers has been convened to act as a think-tank to work with the Director and Assistant Director on a number of policy issues.

9. ITEMS FOR INFORMATION

9.1 DfE funding consultation

Carol Beckman

CB noted that this was summarised by RMG in item 8.1. The consultation consists of 46 questions and in places is complex and unclear. Cllr Harper has had input into the local authority response and members of the forum have had access to the consultation for some time. CB asked the Forum if they would like to submit a joint return with the local authority or would prefer to submit their own.

GK stated that a query was raised at the Forum pre-meeting regarding question 33 around determining which pupils have high needs. GB advised the Forum that the build-up to the local authority response has had political input so the Forum may wish to modify their response in relation to the high needs block. The suggestion of formula funding for the high needs block in the consultation may be detrimental to an area such as Barnet that has historically put a lot of work and resources into high needs and has educated residents who expect continuing levels of provision.

The Forum agreed to make a joint submission with the local authority with an additional comment on question 33 that historical investment into high need should be taken into account.

Action: GB to send an addendum to the consultation response by 11 October. VW to forward this to Cllr Harper for approval before the consultation response is submitted.

9.2 Schools Financial Value Standard

Nick Adams

NA presented a paper for information on the new Schools Financial Value Standard (SFVS). Following DfE consultation, it is proposed that the new SFVS with 23 questions is conducted annually and replaces the old version which had 103 questions and was conducted every three years. There will be no external assessment of the standard and schools should use it for internal evaluation with the expectation of year on year improvement in question responses. It can also potentially be used to advise audit processes. NA is running one hour training sessions on completing the new SFVS and invited questions from the Forum.

AV requested clarification that it is encouraged rather than compulsory for schools for 2011/12. NA confirmed that it is a requirement for 2012/13 but a number of schools are going to complete it for 2011/12 which will be useful to identify any difficulties

SM asked what happens after the reports are lodged with the local authority. NA advised that the local authority will only come back to the school if it is not completed properly. The SFVS is for the benefit of the schools more than the local authority.

9.3 Funding of Redundancies in Schools

Deborah Shaw

VW introduced Deborah Shaw (DS) who was in attendance from Human Resources. The aim of the procedure presented is to provide clarity around the relationship between local authorities and schools regarding redundancies and the practice which has developed historically. The paper is informed by legal advice and guidance over the last year and sets out the legal criteria for redundancy payments. The local authority is trying to avoid redundancies at all costs and wishes schools to adopt the same practice. The paper provides guidance on managing change and the criteria for referral to the Deputy Chief Executive.

DS invited questions from the Forum. KN asked whether schools have to bear the pension costs for teachers aged over 55 and that the local authority is only eligible for the severance cost. DS confirmed this is the case and is stated clearly in section 37. There are some exceptions which are listed in the procedure, for example, school closures.

KN asked whether part of the money being used for redundancies could be used to support redeployment of the teacher to another school. DS stated that technically, there is no reason why not and the purpose of any consultation is to avoid redundancy.

PF asked how this information will be cascaded to schools. VW advised that schools will be notified via the

School Circular and the procedure will be valid from November.

Action: DS to insert item in school circular.

9.4 Capital

Val White

VW advised that capital funding for £500m for pupil places has been announced, and the government is looking at the net capacity of schools as a distribution methodology. Barnet has already done work to update data on net capacity.

VW updated the Forum on the priority schools program. The Private Finance Initiative (PFI) is a successor to BSF and is open to all schools, as well as academies which can make their own applications. Cromer Road and Pardes House are the only two schools making applications. VW advised the Forum that schools with successful bids will be making a 25 year commitment to pay service costs. Any school participating will have to sign a strict undertaking agreeing to meet their element of costs associated with PFI.

8 Any Other Business

No items raised.

Meeting closed at 17:27

Dates for future meetings

1 February 2012	4.00pm
1 May 2012	4.00pm
12 July 2012	4.00pm

5. MATTERS ARISING

Item 5.1 Update on actions from previous meeting

GB to send an addendum to the consultation response by 11 October. VW to forward this to Cllr Harper for approval before the consultation response is submitted.

DS to insert item in school circular on the procedure for redundancies in schools.

6. ITEMS FOR DECISION

Item 6.1 Outcome of Barnet's Funding Consultation

Author Carol Beckman

Position School Funding Manager

Barnet School Funding Formula 2012-13

Introduction

As agreed at the meeting of the Schools Forum on 10 October, the consultation for the proposed changes to Barnet's funding formula proceeded from 12 October to 9 November 2011 (questions and analysis of response results is attached in Appendix A).

Consultation Response

Unfortunately there was a low response (only 9 returns of which two were Schools Forum members) with replies from:

- 6 headteachers: 3 primary, 1 secondary, 2 academy
- 2 primary governors
- 1 primary bursar

This low response makes extending the results to the views of all schools rather uncertain, especially as we had a high number of replies of 'No view'.

Outcome

For the responses to the proposals in questions 1 through 7 there was a majority either in favour of the proposal, or expressing no view. These questions covered the funding areas:

Funding area	Response to proposal		
	Yes	No	No View
1. Secondary Learning Support	33.3%	11.1%	55.6%
2. Secondary Pitch Rental	33.3%	0.0%	66.7%
3. Special Schools Capitation	33.3%	0.0%	66.7%
4. Special Schools Examination Fees	33.3%	0.0%	66.7%
5. VA / Foundation funding element	77.8%	22.2%	0.0%
6. Sports pitch funding element	77.8%	22.2%	0.0%
7. Former Standards Funds formula	77.8%	22.2%	0.0%

Questions 8 and 9 relate to transitional funding arrangements for the introduction of the proposed changes to the funding formula to protect schools which lose out financially. The options presented relate to the length and level of any transitional arrangements and there is a fairly even spread across the various options.

Question 8	Response to proposal		
	No protection apart from the Minimum Funding Guarantee (MFG)	Additional protection for individual schools for 1 year (2012/13) as well as the MFG	Additional but reducing protection for individual schools for 2 years (2012/13) as well as the MFG
Length of protection	22.2%	33.3%	44.4%

Question 9	Response to proposal		
	No loss or gain of more than £1,000	No loss or gain of more than £10,000	No loss or gain of more than £50,000
Level of protection	37.5%	37.5%	25.0%

Action required:

The Forum is asked to:

1. Questions 1 – 7: approve the changes to Barnet’s funding formula proposed in the consultation.
2. Question 8 & 9: provide transitional protection for individual schools for 1 year (2012/13) with no loss or gain of more than £10,000 as a result of the funding of the former standards funds. (This offers a balance between protection to individual schools and progression towards a simplified funding formula).

Appendix A – Response to the consultation with Schools and Academies on the Barnet Schools Funding Formula

Q.1 - Secondary Learning Support Units: Do you agree that the funding for secondary learning support units should be absorbed into the age weighted pupil unit (AWPU) funding rates in 2012/13?

	Response percent	Response rate
Yes	33.3%	3
No	11.1%	1
No view	55.6%	5

Q.2 - Secondary Pitch Rental: Do you agree that the funding for secondary pitch rental should be absorbed into the basic entitlement for all secondary schools in 2012/13?

	Response percent	Response rate
Yes	33.3%	3
No	0.0%	0
No view	66.7%	6

Q.3 - Special Schools Capitation: Do you agree that the funding for special school capitation should be absorbed into the place rate for each school in 2012/13?

	Response percent	Response rate
Yes	33.3%	3
No	0.0%	0
No view	66.7%	6

Q.4 - Special Schools Examination Fees: Do you agree that the funding for special school examination fees should be absorbed into the place rate for the secondary MLD special school in 2012/13?

	Response percent	Response rate
Yes	33.3%	3
No	0.0%	0
No view	66.7%	6

Q.5 - VA / Foundation funding element: Do you agree that the small lump sum for VA / Foundation schools should be absorbed into the basic entitlement for all schools in 2012/13?

	Response percent	Response rate
Yes	77.8%	7
No	22.2%	2
No view	0.0%	0

Q.6 - Sports pitch funding element: Do you agree that the small lump sum for sports pitches should be absorbed into the basic entitlement for all schools in 2012/13?

	Response percent	Response rate
Yes	77.8%	7
No	22.2%	2
No view	0.0%	0

Q.7 - Former Standards Funds formula: Do you agree that the individual formulae for each former standards funds grant should be replaced with a single formula for all those grants, much of which can be absorbed into the existing funding formula for the budget shares 2012/13?

	Response percent	Response rate
Yes	77.8%	7
No	22.2%	2
No view	0.0%	0

Q.8 - Transitional Funding – length of protection: Transitional support would add extra funding to schools receiving less through the new standards funds formula than at present and would take funding from schools which would receive more. What are your views on transitional arrangements to protect schools as a result of the changes proposed above?

	Response percent	Response rate
a) No protection apart from the Minimum Funding Guarantee (MFG)	22.2%	2
b) Additional protection for individual schools for 1 year (2012/13) as well as the MFG	33.3%	3
c) Additional but reducing protection for individual schools for 2 years (2012/13) as well as the MFG	44.4%	4

Q.9 - Transitional Funding – level of protection: If you answered b) or c) to Question 8a, what level of protection / cap should schools receive in the first year?

a) No loss or gain of more than £1,000	37.5%	3
b) No loss or gain of more than £10,000	37.5%	3
c) No loss or gain of more than £50,000	25.0%	2
d) Other – please specify	0.0%	0

Item **6.2 Funding for infant classes with more than 31 on roll**

Author Carol Beckman

Position School Funding Manager

Funding for infant classes with more than 31 on roll

The following is an extract from the description of the 2011/12 school funding formula currently available on Barnet Online:

Infant Class Size Funding

Barnet recognises that compliance to the infant class size legislation in very small schools is difficult and has introduced a formula factor to fund 'ghost' pupil numbers in one form entry schools with more than 30 in KS1 classes.

For each one form entry school with more than 30 in a KS1 class, 'ghost' pupils will be added to ensure that when multiplied by the appropriate AWPU rate (£2676.65), funding will approximate to the average teacher cost. This only applies where the school has opposed the admission of the additional pupil or the child has been placed in the school under the Fair Admissions Protocol.

This will enable the school to employ an additional teacher for KS1 class size compliance. The ghost number will be rounded up or down to the nearest whole number.

In 2011/12 – 10 classes received extra funding because in the January census a Key Stage 1 class had more than 30 pupils, and the Schools Budget funded approximately £40,000 per class - £400,000 in total. Schools were funded for a whole on the assumption that the class size remains over number for the whole financial year.

Due to the increased pressure on infant class places and the use of the Fair Access policy to assign unplaced children to schools over number, we expect Infant Class Size funding to become a greater issue in 2012/13.

The Fair Access procedure initially provides the school with £1000 for the first child and £500 for a subsequent child. The child becomes an 'accepted' child – i.e. the school is allowed to have the child in an infant class with only one teacher until the end of the financial year. The school may not voluntarily admit another child into the class until the number drops to 29. The next financial year, if the class is still over number, the school must take 'qualifying measures' – i.e. ensure the class has access to two teachers.

Because the Infant Class Size benefit is currently limited to 1 form entry (1 FE) schools, a number of two or three form entry schools which are expecting to still be over number by January 2012 are concerned about the funding in 2013/14.

The Schools Forum is asked to consider the following options for 2012/13:

Option 1

Leave the funding system unchanged. Larger schools would still have to take qualifying measures but pay for them from their own resources until class size falls to 30 or less.

Extra Cost: £0

Option 2

Leave the funding system for 1 FE schools unchanged, but provide larger schools with classes over number a fixed lump sum of £1000 per term until the class drops down to 30 – bearing in mind that the 31st child will have attracted full year funding of various kinds (AWPU, AEN, etc).

Extra Cost: If 10 larger schools had a class over number for the whole year the total cost would be £30,000 in addition to £40,000 per 1FE class with more than 30. A contingency would have to be put aside to manage this expense during the year.

Option 3

Extend the current system to schools of all sizes with classes over number.

Cost: If 10 two or three FE schools were to qualify in addition to 10 one FE schools, the funding would double to over £800,000.

It is important to note that any additional funding for infant class size would affect all schools as there would be less money to distribute across other parts of the funding formula.

The Schools Forum is asked to express a preference from the 3 options above for 2012/13 only. Infant class size regulations may change from 2013.

7. ITEMS FOR CONSULTATION

Item 7.1 Council Budget

Author Val White

Position Assistant Director, Children's Service

The council has now launched the formal budget consultation for the mid-term financial strategy. The savings proposals for the Children's Service for 2012/13 are unchanged from the proposals presented and discussed at the last Schools Forum. Consultation is now taking place through individual presentations at meetings (including Primary and Secondary termly meeting with the Director, Headteachers Forum etc), circulation of the consultation through the schools circular and on line at:

http://engage.barnet.gov.uk/consultation-team/business_plan_and_budget_2012-13-14-15/consult_view

The views expressed at the last Schools Forum will be fed into the consultation responses.

8. ITEMS FOR INFORMATION

Item 8.1 Announcements from the DfE

Author	Carol Beckman
Position	School Funding Manager

At the time of issuing the papers there were no announcements to report. Any announcements prior to the meeting will be announced on the day.

Item 8.2 2011/12 DSG projected outturn

Author Kerry-Anne Smith

Position Head of Finance (Children and Adults)

Introduction

The purpose of this report is to inform the Schools Forum about the projected outturn of the centrally retained schools budget.

2011/12 Budget and Projected Spend

The Schools Budget and the use of the carry-forward underspend of £2.35m from 2010/11 was approved by the Schools Forum on 14 July 2011.

Officers of the Council have provided end of year projections against each of the centrally retained budgets and these figures were calculated as at the end of September 2011.

The figures are shown in the attached table.

The overall position is a projected end of year underspend of £287,000 against the Schools Budget based on known costs to date.

Main Variances against the Budget:

1. Inter-authority recoupment underspend of £46,000

There is a small increase in out of borough pupils in Barnet schools and further analysis of the figures in the year is underway

2. SEN pupil costs underspend of £169,000, there was a net decrease in leavers and starters in the new academic year. There is a potential to underspend to a larger degree due to more leavers and we will have a better understanding at month 9. Officers continue to monitor this budget on a monthly basis
3. One off staffing underspend of £72,000 due to the restructure and changes to provision of out of school education provision. Recruitment is underway to fill the new structure

Managers of centrally retained budgets regularly review their projected year end spend and identify areas any areas of concern. Budget holders work closely with finance to inform them of the current position.

Other Items

The recoupment of specific centrally retained budgets for schools that have converted to academies within 2011/12 is still to be confirmed by the YPLA. Budget provision of £168,447 has been made in the Schools contingency line for the reduction in the centrally retained budgets that cannot be reduced during the year as they were already fully committed. Conversions up to and including 1st November amount to £85,000.

Recommendation:

The Forum notes the budget outturn projections for 2011/12 and agrees to receive further budget monitoring reports at future meetings.

Previous reports to the Forum - 10 May reported the 2010/11 outturn and presentation of the proposed 2011/12 budget and 14 July agreed the budget for 2011/12.

2011/12 Centrally Retained Schools Budget Monitoring Report -Projections as at month 6

SCHOOLS BUDGET INCOME		Jul 11	Changes	Nov 11	Forecast	Variance to Budget	Comments
	Pupils	44,487	259	44,746			Final Barnet pupil numbers 2011/12 - 44,746
	DSG	250,988,981	1,461,019	252,450,000	252,450,000	-	
	Recoupment - from ISB		- 42,549,939	- 42,549,939	- 42,549,939		Recoupment includes converters to 1st November 2011
	Recoupment - LACSEG						
	Recoupment (Budget Shares & LACSEG)	- 30,679,011	- 11,870,928	- 42,549,939	- 42,549,939	-	
	YPLA	19,160,004	- 44,534	19,115,470	19,115,470		YPLA learner allocation all 6th forms
	YPLA SEN	2,773,085	-	2,773,085	2,773,085		Final YPLA allocation
	TPG	572,180	-	572,180	572,180		Final YPLA allocation
	YPLA reduction for Academies	- 3,818,159	- 2,514,930	- 6,333,089	- 6,333,089		Adjustment includes converters to 1st November 2011
	Total YPLA	18,687,110	- 2,559,464	16,127,646	16,127,646	-	
			-				
	Underspend	2,350,000	-	2,350,000	2,350,000	-	
			-				
	PP Free School Meals	3,221,524	627,820	3,849,344	3,849,344		Includes increase of £58 announced
	PP Non maintained	13,330	- 13,330		-		
	PP LAC	72,670	15,170	87,840	87,840		
	PP Service Children	8,200	-	8,200	8,200		
	PP FSM & SC reduced for Academies		-				
	Pupil Premium	3,315,724	629,660	3,945,384	3,945,384	-	
	Total	244,662,804	- 12,339,713	232,323,091	232,323,091	-	
	Total before recoupment	279,159,974	2,046,145	281,206,119	281,206,119		
SCHOOLS BUDGET EXPENDITURE			0				
1.0.1	Individual Schools Budget	252,623,605	1,416,485	254,040,090	254,040,090	-	
	LESS Academies Recoupment	- 34,497,170	- 14,385,858	- 48,883,028	- 48,883,028	-	
1.0.1	ISB Net (i.e. Maintained schools and delegated to Academies)	218,126,435	- 12,969,373	205,157,062	205,157,062	-	
1.0.3	Pupil Premium - maintained schools FSM & SC	3,248,680	608,864	3,857,544	3,857,544	-	
	Pupil Premium - LAC	67,044	20,796	87,840	87,840	-	
1.0.3	Total Pupil Premium	3,315,724	629,660	3,945,384	3,945,384	-	
1.0.4	Threshold and Performance Pay (Devolved)		-				
1.0.10	Central expenditure on education of children under 5	840,030	-	840,030	840,030	-	

SCHOOLS BUDGET INCOME		Jul 11	Changes	Nov 11	Forecast	Variance to Budget	Comments
	Distributed to maintained schools and settings	222,282,189	- 12,339,713	209,942,476	209,942,476	-	
	Centrally retained		-				
1.1.2	School specific contingencies	1,251,447	- 1,251,447	-			
	Statements		400,000	400,000	400,000	-	Forecast to be on budget with potential to cover small under and over spends within contingency
	Special & Resourced Schools		250,000	250,000	250,000	-	Forecast to be on budget with potential to cover small under and over spends within contingency
	SEN Contingency		123,000	123,000	123,000	-	Forecast to be on budget with potential to cover small under and over spends within contingency
	School Organisation		300,000	300,000	300,000	-	Forecast to be on budget with potential to cover small under and over spends within contingency
	LACSEG		168,447	168,447	168,447	-	Potentially 3 more to convert in this financial year the potential underspend is being monitored
	Pupil Premium		10,000	10,000	10,000	-	
1.1.2	Total Contingencies	1,251,447	-	1,251,447	1,251,447	-	
1.1.3	Early Years contingency	200,000	-	200,000	200,000	-	Funded termly on estimates, the forecast to budget potentially underestimates a pressure as nursery pupil numbers are increasing
	Total School Contingencies	1,451,447	-	1,451,447	1,451,447	-	
1.2.1	Provision for pupils with SEN (including assigned resources)	2,390,149	-	2,390,149	2,390,149	-	
1.2.2	SEN support services	494,035	-	494,035	494,035	-	
1.2.3	Support for inclusion	489,700	-	489,700	489,700	-	
1.2.4	Fees for pupils with SEN at independent special schools & abroad	7,806,458	-	7,806,458	7,637,458	- 169,000	Underspend on SEN pupils monitored monthly by officers.
1.2.5	SEN transport	400,000	-	400,000	400,000	-	
1.2.6	Fees to independent schools for pupils without SEN	76,575	-	76,575	76,575	-	
1.2.7	Interauthority recoupment	2,304,860	-	2,304,860	2,258,860	- 46,000	Placements forecast to date monthly monitoring of spend
1.2.8	Contribution to combined budgets	907,460	-	907,460	907,460	-	
1.3.1	Pupil Referral Units	1,815,335	-	1,815,335	1,815,335	-	
1.3.2	Behaviour Support Services	237,730	-	237,730	237,730	-	
1.3.3	Education out of school	537,971	-	537,971	465,971	- 72,000	One off staffing saving due to restructure and vacant posts, recruitment in progress
1.3.4	14-16 More practical learning options	64,000	-	64,000	64,000	-	

SCHOOLS BUDGET INCOME		Jul 11	Changes	Nov 11	Forecast	Variance to Budget	Comments
1.4.1	Support to underperforming ethnic minority groups and bilingual learners	281,580	-	281,580	281,580	-	
1.5.1	School meals - nursery, primary and special schools	-	-	-	-	-	
1.5.2	Free school meals eligibility	3,568	-	3,568	3,568	-	
1.5.3	Milk	-	-	-	-	-	
1.5.4	School kitchens repair and maintenance	-	-	-	-	-	
1.6.1	Insurance	415,226	-	415,226	415,226	-	
1.6.2	Museum and Library Services	32,753	-	32,753	32,753	-	
1.6.3	School admissions	394,192	-	394,192	394,192	-	
1.6.4	Licences/subscriptions	-	-	-	-	-	
1.6.5	Miscellaneous (not more than 0.1% total of net SB)	211,580	-	211,580	211,580	-	
1.6.6	Servicing of schools forums	34,680	-	34,680	34,680	-	
1.6.7	Staff costs supply cover (not sickness)	155,620	-	155,620	155,620	-	
1.6.8	Supply cover long term sickness	-	-	-	-	-	
1.6.9	Termination of employment costs	-	-	-	-	-	
1.6.10	Purchase of carbon reduction commitment allowances	351,656	-	351,656	351,656	-	
1.7.1	Other Specific Grants	-	-	-	-	-	
1.8.1	Capital Expenditure from Revenue (CERA) (Schools)	1,524,040	-	1,524,040	1,524,040	-	
1.8.2	Prudential borrowing costs	-	-	-	-	-	
1.2.1 - 1.8.2	Total other Centrally Retained	20,929,168	-	20,929,168	20,642,168	- 287,000	
	TOTAL EXPENDITURE	244,662,804	- 12,339,713	232,323,091	232,036,091	- 287,000	
	Balance	-	-	-	-	-	