

DECISIONS OF THE SCHOOLS FORUM HELD ON WEDNESDAY 6 JANUARY 2016

DECISIONS:

1. **MATTERS RAISED BY SCHOOLS**

No resolution was passed on this item.

2. **STANDING ITEM – DSG GROWTH FUND ALLOCATIONS**

No resolution was passed on this item.

3. **STANDING ITEM – BRADFORD EDUCATION IMPROVEMENT
COMMISSIONING BOARD**

No resolution was passed on this item.

4. **UPDATE ON THE 2016/17 DSG FUNDING POSITION**

Resolved – That the information contained in Document FQ be noted.

5. **UPDATE 2015/16 CENTRALLY MANAGED FUNDS SPENDING POSITION**

Resolved – That the information contained in Document FR be noted.

6. **CENTRALLY MANAGED AND DE-DELEGATED FUNDS 2016/17**

Resolved – That the information contained in Document FS be noted.

7. **INDICATIVE DELEGATED BUDGETS 2016/17**

Resolved – That the information contained in Document FT be noted.



8. FINAL RECOMMENDATIONS AND DECISIONS 2016/17 FINANCIAL YEAR DEDICATED SCHOOLS GRANT (DSG)

SCHOOLS & EARLY YEARS BLOCK CENTRAL AND DE-DELEGATED ITEMS 2016/17

Funds for the 2016/17 financial year agreed by Schools and Academies Members on a relevant phase specific basis (Early Years, Primary and Secondary):

Resolved –

- (1) **Schools Forum Costs:** agreed to continue the DSG budget at the value of £10,000.
- (2) **School Admissions:**
 - Agreed to continue the DSG budget at the value of £577,600.
 - Agreed to delegate responsibility for the allocation of the £151,000 sum, including to the establishment of the Fair Access Officer post approved by the Schools Forum, to the Bradford Education Improvement Commissioning Board (BEICB).
- (3) **DSG Matched Contribution to School Improvement:**
 - Agreed to delegate the sum of £432,640, released from ceasing the DSG's contribution to the consultants teams, to Primary and Secondary budget shares, and to Early Years delegated budgets, as outlined in Document FS and its appendices.
 - Agreed to delegate the sum of £128,582, by reducing by 25% the DSG's Matched Contribution to School Improvement for the period 1 September 2016 to 31 March 2017, to Primary and Secondary budget shares, and to Early Years delegated budgets, as outlined in Document FS and its appendices.
 - Agreed to delegate the sum of £96,550, by reducing by 25% the DSG's contribution to Early Childhood Services for the period 1 September 2016 to 31 March 2017, to Primary and Secondary budget shares, and to Early Years delegated budgets, as outlined in Document FS and its appendices.
 - *Please note that this recommendation relates to funding from 1 April 2017.* Agreed to continue the DSG's Matched Contribution to School Improvement and to Early Childhood Services for the period 1 April 2017 to 31 August 2017 at the reduced values outlined in Document FS Appendix 1 (the values for the period 1 April 2015 to 31 August 2015 reduced by 25%).



- *Please note that this recommendation relates to funding from 1 April 2017.* Agreed to cease the DSG's Matched Contribution to School Improvement and to Early Childhood Services at 31 August 2017, with the sums released to Primary, Secondary and Early Years delegated budgets in 2017/18 and 2018/19 following the principles outlined in Document FS Appendix 2.
 - *Please note that this recommendation relates to funding from 1 April 2017.* The Local Authority is expected to manage transition to minimise the cost to the 2017/18 DSG of staffing restructure.
- (4) Agreed to hold a contingency of £193,700 in the Early Years Block to meet the costs of in year adjustments relating to the termly re-calculation of nursery funding.

Schools Members representing maintained schools agreed the following values of de-delegated funds as per Document FS Appendix 1 and Appendix 2 for the 2016/17 financial year:

- (5) **ESBD School Support (Primary only):** Agreed to continue de-delegation to provide the same cash budget as 2015/16 (with a reduced £app contribution) so that the review (the Council's proposals for a Virtual School for Vulnerable Children and the development of a sector-led delivery model for specialist SEND teaching services) can determine the allocation / re-allocation of monies. The review may mean that how the de-delegated fund is allocated may change during the year and the Schools Forum is to be consulted on any proposed changes.
- (6) **Minority Ethnic School Support:** Agreed to cease de-delegation from the end of April 2016 and to provide in the 2016/17 financial year a de-delegated fund to the value of 1 month's cost of service plus the DSG's proportionate contribution to re-structure costs (Primary and Secondary).
- (7) **Costs of FSM Eligibility Assessments:** Agreed to continue de-delegation at the 2015/16 per FSM values, with the contribution taken from FSM Ever 6 allocations (Primary and Secondary).
- (8) **Fisher Family Trust:** Agreed to continue de-delegation to meet the cost of licences (Primary and Secondary), understanding that the cost of licences has still to be finally confirmed for 2016/17.
- (9) **School Maternity / Paternity 'insurance' fund:** Agreed to continue de-delegation at increased per pupil values in 2016/17 (+ £3.19); increased in response to the actual cost profile in 2015/16, net of an estimated reduction in cost from the anticipated conversions of schools to academies during 2016/17 (Early Years, Primary and Secondary).
- (10) **Trade Union Facilities Time – Negotiator Time:** Agreed to continue de-delegation at the 2015/16 per pupil values (Early Years, Primary and Secondary).



- (11) **Trade Union Facilities Time – Health and Safety Time: Agreed to continue de-delegation at the 2015/16 per pupil values (Early Years, Primary and Secondary).**
- (12) **School Staff Public Duties and Suspensions Fund: Agreed to continue de-delegation at the 2015/16 per pupil values (Early Years, Primary and Secondary).**
- (13) **School Re-Organisation Costs (Safeguarded Salaries): Agreed to continue de-delegation in 2016/17 to meet the actual cost of continuing safeguarded salaries (Primary and Secondary only).**
- (14) **Exceptional Costs & Schools in Financial Difficulty: Agreed to continue de-delegation to provide planned budgets of £150,000 (Primary) and £25,000 (Secondary only) in 2016/17.**

All Forum Members agreed by consensus the principles behind the management of these funds, that:

- (15) **Funds set for 2016/17 are to be managed by the Schools Forum and that the Forum be provided with monitoring reports during the year.**
- (16) **Any over or under spending of these funds in 2016/17 be written off from, or added back to, the DSG in 2017/18 on a phase specific basis i.e. if Secondary schools overspend this will be written off from the 2017/18 Secondary ISB etc (noting that this general principle may be affected by the implementation of a national funding formula at April 2017).**
- (17) **All funds, and the values of these funds, are set for 2016/17 only and will be subject to annual review, to take account of changes in commitments, changes in the delivery of services, the number of schools that have converted to academy status, and also the introduction of a national funding formula.**
- (18) **If it is necessary, and agreed by the Schools Forum, to write off to the DSG a deficit of a closing maintained school, or a maintained school that converts as a sponsored academy during 2016/17, where de-delegated budget provision has not been specifically made, this will be done retrospectively from the 2017/18 DSG or from any one off balances available at the end of 2016/17. That the Authority would anticipate using the DSG's 'resilience reserve', allocated to enable de-delegation, to meet such costs.**

[GROWTH FUND ALLOCATIONS 2016/17](#)

All Schools and Academies Members by consensus agreed:

- (19) **To the Growth Fund allocations for existing & known expansions and bulge classes in 2016/17 listed in Document FU Appendix 1, at a total cost of £1,608,421.**



- (20) An additional planned budget of £550,000 to be held for in year new allocations for both Primary and Secondary schools and academies; this planned budget is split £250,000 Primary and £300,000 Secondary. All further in year allocations from the Growth Fund will be agreed by the Forum prior to confirmation with the receiving school. Growth Fund allocations will continue as a standing Forum agenda item to enable this.

THE HIGH NEEDS BLOCK 2016/17

All Forum Members by consensus agreed to:

- (21) Retain all current budget allocations within the High Needs Block in the 2016/17 financial year unless otherwise specifically stated. This is done on the understanding that the proposed re-commissioning of SEND teaching support services (proposed in the Council's budget consultation for 2016/17) may mean that centrally managed budgets are re-allocated (to schools) during the financial year. The Schools Forum will be further consulted on this.
- (22) Retain the 2015/16 structure of the High Needs Funding Model (Place-Plus) to calculate delegated allocations for the 2016/17 financial year but with the following amendments:
- Remove the Bradford-Specific Minimum Funding Guarantee factor for Special Schools and Academies and DSPs from 1 April 2016, but retaining the 1.5% total cash budget protection reduction factor.
 - That the proposal to, "only calculate additional place-led funding (where settings may admit children above their planned place number) at the end of the financial year on a composite monthly occupancy figure. Settings will continue to be funded for all additional places at the £10,000 value" be further considered with the representative of maintained special schools, in response to her comments made at the meeting, with a final methodology to be reported back to the Schools Forum at the next meeting.
- (23) Continue the methodology for the calculation of the Top Up (Element 3) funding for Post 16 High Needs students in Further Education Settings that was established at September 2015 and reported to the Schools Forum on 21 October 2015.
- (24) Calculate the initial planned cost of High Needs Block spending in 2016/17 (place-led and plus elements) on the allocation of places for Bradford-located settings at a total of 2,000 for the 2016/17 academic year. This is the same as presented to the Forum in December in Document FO Appendix 1 at individual institution level, but with an adjustment to increase the number of secondary-aged alternative provision places to 394.
- (25) Increase the planned budget in the High Needs Block by £500,000 for the cost of placements in independent settings and non-maintained special schools.



- (26) Continue to apply the established principle that the distribution of alternative provision places (394 places) can move flexibly with the needs of students as identified by the Local Authority and the BACs and that the total number of places can be exceeded where a clear mechanism is in place for the DSG to be reimbursed for the cost of these from the BACs.
- (27) Continue the additional £180,000 allocated to Primary-aged behaviour support. How this funding is to be used (and allocated to places at individual settings) will be determined by the review.
- (28) Add to the initial setting-identified planned places provision an additional, currently unallocated, budget for a further 10 places at April 2016 and 20 places at September 2016 (calculated at £20,000 per place and rounded to a total cost of £400,000), which is available to fund both SEND and alternative provision additional places.
- (29) Allocate the £600,000 of secondary one off monies to help resolve the immediate pressure for places, especially at District PRU.
- (30) The funding released from the reduction in places in the ARCs (places have been reduced by 18) to be transferred to be available a) to meet the cost of placements in other delegated settings and b) to ensure that the centrally managed teaching service has sufficient capacity to support children in mainstream settings.
- (31) Control the growth in cost pressure / help support meeting the funding gap in the overall DSG that is the result of the growth in pressure in the High Needs Block (as outlined in Document FQ) by making the following adjustments:
- Reduce the rates of Top Up in the HNB Funding Model for all Place-Plus calculated budgets by the same % that Early Years, Primary and Secondary variables are reduced by in order specifically to meet the funding gap. That the values of Top Up for each Range are reduced by the same %. This is a reduction of 0.42%. Funding values are shown in Document FT Appendix 3.
 - Apply the same % reduction (0.42%) to all centrally managed / non-Place-Plus High Needs Block budgets.
 - Reduce the specialist equipment budget for special schools and academies by 50% at 1 April 2016, to £37,500.
- (32) Continue to finance the additional £200,000 planned budget for the Early Years Inclusion Panel (EYIP) in 2016/17, to allocate in support of SEND needs of 2 year olds taking the free entitlement, from the balance of the under spending of the DSG's 2 year old resources.



- (33) Agreed to continue a budget, at a value of £100,000, in the High Needs Block to be available to contribute to capital costs associated with the expansion of existing, or the establishment of new, resourced provisions.
- (34) Agreed to hold an unallocated contingency sum of £250,000 within the High Needs Block planned budget (reduced from £425,000 in 2015/16) to support meeting any unexpected costs associated with the placement of children in specialist settings and to meet the expected increase in the cost of statements in mainstream provision.

THE ALLOCATION OF ONE OFF MONIES (DSG UNDERSPEND)

All Forum Members noted that:

- (35) Further approval is not sought for the allocation of the £303,448 relating to funds to be retained for the same purpose or re-allocated back to delegated budgets in 2016/17 (as this is a requirement of the Finance Regulations).
- (36) No value of one off monies is allocated generally into delegated budgets in 2016/17.
- (37) £2.418m of the £9.637m has already been committed to be spent after 1 April 2016 by decisions by the Schools Forum taken at previous meetings (shown in section 1 of Document FR Appendix 1). Members are not asked to revisit these:
- Financial Support for Beckfoot Upper Heaton Academy £1.175m
 - Post Opening Diseconomies of Scale Funding – Bradford Forster Academy £0.166m
 - Revenue Support for the Outdoor Education Centres £0.228m
 - EYIP Funding for 2 Year Olds (SEND) £0.200m
 - Deficit of a Secondary School Converting to Academy Status £0.650m

All Forum Members by consensus agreed to:

- (38) Retain the balance of the under spending of the DSG's 2 year old resources, forecasted to be £773,400 (but subject to change), to be spent from April 2016 on the further development of the District's 2 year old provision, including ensuring a sufficiency of places across all areas of the District and providing a budget to be available to fund work to assess the impact of the 2 year old offer on educational outcomes.
- (39) Retain the balance of the Joint Improvement Investment Fund unspent at 31 March 2016, currently forecasted to be £765,904 (but subject to change), to continue to be managed and allocated by the Bradford Education Improvement Commissioning Board from April 2016 for the original purposes for which the Fund was established by the Forum.



- (39) Retain the balance of the Primary Behaviour Support Fund, currently estimated to be £85,000 at 31 March 2016 (but subject to change), to continue to fund strategic change and transition, including to continue to fund the cash budget protection factor for the Primary Behaviour Centres for as long as this is applicable in 2016/17 (timescale to be determined by the current strategic review).**
- (40) Retain the £600,000 of secondary one off monies to be spent specifically to help resolve the immediate pressure for places, especially at District PRU.**
- (41) Retain the £151,000 admissions fund allocated in 2015/16 and to delegate responsibility for this to the Bradford Education Improvement Commissioning Board (BEICB).**
- (42) Retain the £2,000,000 DSG resilience reserve. This reserve is available to be used to support unexpected additional costs (and potentially any deficits of maintained schools converting to academy status through the de-delegated re-organisation costs route).**
- (43) Retain the £968,158 DSG reserve from which to finance capital loans, noting that £1,000,000 is the maximum total value of loans that can be agreed at any one time.**
- (44) Allocate £0.517m of one off monies to minimise the extent to which formula funding rates have to be reduced in 2016/17 to absorb the cost of growth in former non recoupment academies.**
- (45) Allocate £0.428m to fund the Forum's agreed commitment to the post opening diseconomies of scale support to Bradford Forster Academy for the 2017/18 financial year (to be paid in advance in 2016/17).**
- (46) Set aside a further £0.931m for the Forum's agreed financial support commitment to Beckfoot Upper Heaton Academy (formerly Belle Vue Boys Secondary School). This creates a total available budget of £2.105m.**

EARLY YEARS FUNDING AND PRO-FORMA 2016/17

Schools and Academies Members (by consensus on a phase specific basis) agreed to:

- (47) Continue the established principle that any over or under spending against estimated budgets, resulting from termly adjustments and from the re-calculation of the DSG for January 2016 & January 2017 pupil numbers, be written off from, or added back to, the DSG budget in 2017/18, noting that this may be affected by the implementation of a national funding formula at April 2017.**



- (48) Confirm the setting base rates values for the 2016/17 financial year for Early Years Single Funding Formula for Nursery schools, Nursery Classes and PVI Providers at:
- 2 year olds (all settings) £4.83 pr hour
 - 3 / 4 year olds Maintained Nursery Schools £5.70 pr hour
 - 3 / 4 year olds Nursery Classes attached to primary schools / academies £4.13 per hour
 - 3 / 4 year olds Private, Voluntary and Independent providers £4.62 per hour
- (49) Apply a 0.42% reduction to the average deprivation rate in the 3 and 4 Year Old EYSFF in line with the flat rate reduction for the DSG funding gap applied to all other funding factors.
- (50) The Pro-Forma, which summarises the Early Years Single Funding Formula values for the 2016/17 financial year shown at Document FT Appendix 5.

PRIMARY AND SECONDARY FUNDING AND PRO-FORMA 2016/17

Schools and Academies Members (on a phase specific basis) agreed:

- (51) The value of the DSG's contribution to the Building Schools for the Future affordability gap for 2016/17 be set at £6,384,271, which is the 2015/16 value plus an estimated 1.5% RPIX (an increase of £94,349).
- (52) The Primary and Secondary Pro-forma for the 2016/17 financial year shown at Document FT Appendix 4.
- (53) The minutes of the meeting will record the disagreement from the consensus of a representative of maintained primary school headteachers and the concerns expressed by the representative on the continued weighting of the DSG towards the secondary phase.

9. ANY OTHER BUSINESS (AOB)

No resolution was passed on this item.

10. DATE OF NEXT MEETING

The next meeting of the Schools Forum is Wednesday 16 March 2016.

- (54) That detailed reports, on SEND and Behaviour strategy matters and on the outdoor education centres, be presented to the March meeting. That these reports respond comprehensively to the outstanding action points and requests for information that have made by the Schools Forum and that are recorded in the minutes of previous meetings.



- (55) That additional information also be provided to the March meeting on the anticipated volume of conversions of maintained schools to academy status in Bradford and the likelihood of liabilities resulting from the conversion of schools holding deficit budgets.**

*FROM: Dermot Pearson (Interim City Solicitor)
City of Bradford Metropolitan District Council*

*Contact Asad Shah: 01274 432280
Committee Secretariat
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