Schools Forum

Schedule
Monday 18 November 2019, 3:00 PM — 5:30 PM GMT

Venue
Room 15, Priory House, Monks Walk, Chicksands, Shefford, SG17 5TQ

Description
To Chair and Members of the Schools Forum as laid out in the attached.

Notes for Participants
Please note that phones or other equipment may be used to film, audio record, tweet or blog from this meeting. No part of the meeting room is exempt from public filming.

The use of arising images or recordings is not under the Council's control.

For further information on this meeting contact: committeemeetings@centralbedfordshire.gov.uk

Hard copies of the papers for this meeting are not routinely made available to those in attendance. Should you require a copy of the agenda, please download this from the Council website beforehand.

Agenda

Membership of Schools Forum

[Schools Forum Membership.docx]

1. Apologies for Absence

To receive apologies for absence and notification of substitute Members.

2. Minutes

To approve as a correct record the minutes of the meeting of the Schools Forum held on 16 September 2019.

[02. 100916 Schools Forum minutes.doc]
3. Chair's Announcements and Communications

To receive any announcements from the Chair and any matters of communication.

4. Schools Forum Powers and Responsibilities

To receive a report on the outcome of some early modelling undertaken by the Council, following the DfE’s formulaic approach to the allocation of the Growth Funding for 2020/21, the possible impact of the new formulae on the level of funding the Council receives to fund schools that have expanded under the New School Places Programme, risk to the standardised payment and to seek approval to continue to implement the Growth Fund standardised payment for 2020/21.

5. Growth Fund for New School Places

To receive a report on the revenue funding implications for schools as a result of accommodating growth and by changing the age of transition and to seek approval for a working group to review processes to ensure funding follows the pupils and to minimise the impact of change on schools.

6. Schools for the Future - financial implications for growth and age of transition

To comment on the consultation document and agree that the document be circulated for consultation with all schools following receipt from the Department for Education.
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14. Work Programme

To consider the work programme for the Central Bedfordshire Schools Forum.

14. SF work programme covering report.docx
14. 191118 Work Programme.doc

15. Date of the Next Meeting

Monday 13 January 2020
School Members
Mr S Barnard, Governor, Doverly Down Lower School
Mr T Clarke, Headteacher, Gothic Mede Academy
Mrs L Collins, Headteacher, Westfield Nursery
Mr J Creswick, Headteacher, Ivel Valley School
Mrs C Earp, Headteacher, Henlow Middle School
Mr C Field, Governor, Alameda Middle School
Miss L Ganney, Headteacher, Robert Peel Primary School
Ms K Hayward, Headteacher, Sandy Upper School
Mr M Howe, Governor, Leighton Middle School
Mr J Hughes, Headteacher, Parkfields Middle School
Mrs J New, Headteacher, Flitwick Lower School
Mr D Penfold, Governor, Cranfield CofE Academy
Mr J Selmes, Headteacher, Weatherfield and Oak Bank Academies
Mrs M Smith, Headteacher, Priory Academy
Mrs S Teague, Headteacher, Caddington & Slip End Lower School
Mr S Tiktin, Governor, Beaudesert Lower School
Mrs C White, Headteacher, Harlington & Sundon Academy

Non School Members
Mr P Burrett, Church of England Diocese Representative
Mr M Foster, Trade Union Representative
Mrs M Morris, Catholic Diocese Representative
Ms S Mortimer, Post 16 Education Representative
Cllr D Shelvey, Chairman of the Children’s Services Overview & Scrutiny Committee

Observer
Cllr S Clark, Executive Member for Families, Education and Children

Current Vacancies
Primary Maintained School Governor
PRU/AP Academy Headteacher
Officers
Ms L Bartos, Head of Service for SEND
Ms S Bellamy, Acting Senior Finance Manager, Children’s Services
Mr P Fraser, Assistant Director, Education
Ms S Griffin, Committee Services Officer
Mrs S Harrison, Director of Children’s Services
Mrs S Tyler, Assistant Director, Business and Supporting Services
1. Apologies for Absence

To receive apologies for absence and notification of substitute Members.
2. Minutes

To approve as a correct record the minutes of the meeting of the Schools Forum held on 16 September 2019.
At a meeting of the **Schools Forum** held in Room 15, Priory House, Monks Walk, Chicksands, Shefford, SG17 5TQ on Monday 16 September 2019, 3:00 PM — 5:10 PM

**Present**

Miss K Hayward (Chair), Sandy Secondary School  
Mr J Creswick, (Vice-Chair), Ivel Valley School

**School Members:**  
Mr S Barnard, Governor, Dover Down Lower School  
Mr T Clarke, Headteacher, Gothic Mede Academy  
Mrs L Collins, Headteacher, Westfield Nursery  
Mr C Field, Governor, Alameda Middle School  
Mr M Howe, Governor, Leighton Middle School  
Mr J Hughes, Headteacher, Beecroft Academy  
Mrs J New, Headteacher, Flitwick Lower School  
Mr J Selmes, Headteacher, Weatherfield Academy Special School  
Mrs M Smith, Headteacher, Priory Academy  
Mrs S Teague, Headteacher, Caddington and Slip End Lower School  
Mr S Tiktin, Governor, Beaudesert Lower School  
Mrs C White, Headteacher, Harlington and Sundon Academy

**Non-School Members:**  
Mr P Burrett, Church of England Diocese

**Apologies for Absence:**  
Mrs C Earp, Headteacher, Henlow Middle School  
Mr M Foster, Trades Union Representative  
Mrs S Harrison, Director of Children’s Services  
Mr D Penfold, Governor, Cranfield CofE Academy  
Cllr D Shelvey, Chairman of Children’s Services Overview and Scrutiny Committee  
Mrs S Wells, School Governor, St Andrew’s Lower School

**Officers in Attendance:**  
Mrs L Bartos, Head of Service for SEND  
Ms S Bellamy, Acting Senior Finance Manager, Children’s Services  
Mr P Fraser, Assistant Director Education  
Ms S Griffin, Committee Services Officer  
Cllr S Clark, Executive Member for Families, Education and Children  
Mrs S Tyler, Assistant Director Business and Supporting Services

**Others in Attendance:**  
Mrs B Bourn, Manager Early Years SEND Team  
Mrs C Clough, Speech and Language Therapist  
Mrs J Redding, Head of Service, The Jigsaw Centre  
Mrs S Salisbury, Head of Outreach, The Jigsaw Centre  
Mr N Shaw, Head of Schools for the Future  
Mrs M Smithers, Heath Barn Pre School
1. Minutes

RESOLVED

that the minutes of the meeting of the Schools Forum held on 10 June 2019 be confirmed and signed by the Chair as a correct record.

Matters Arising

Item 9 - Dedicated School Grant Contingency Budgets
The balance for Ashton Middle School would be transferred to the Diocese of St Albans for dissemination.

2. Chair's Announcements and Communications

The following announcements and communications were made:

- The appointments process had taken place for vacancies on the Schools Forum. The following representatives had been elected and were welcomed to the meeting:
  - Mr S Barnard, Primary Maintained School Governor
  - Mr T Clarke, Primary Academy Head Teacher
  - Mrs L Collins, Nursery School Head Teacher
  - Mr J Hughes, Secondary Maintained Head Teacher
- Mrs S Wells had resigned from her role as Primary Maintained School Governor on the Schools Forum. Thanks, were given to Mrs Wells for her time and support as a member of the Forum.
- Elections would take place for the following membership vacancies prior to the November meeting of the Schools Forum:
  - Primary Maintained School Governor
  - Secondary Maintained School Head Teacher
  - PRU/AP Academy Head Teacher

3. Schools Forum Powers and Responsibilities

NOTED

the Schools Forum powers and responsibilities summary document issued by the Education Funding Agency in September 2018.

4. Early Years Block 2019/20

The Schools Forum received a report on the updated allocation to the Early Years Block of the Dedicated Schools Grant, and the spend to the end of the first term of 2019/2020.
Points and comments included:

- The updated allocation for the Dedicated Schools Grant (DSG) issued by the Department for Education had resulted in an overall increase over the initial allocation of £737k.
- The Early Years SEND team was originally set up to work with Early Years Private, Voluntary and Independent (PVI) providers. Work had also taken place with some nursery classes and pre-schools run by Lower and Primary schools. However, the resources have never been made available to work with all Lower/Primary Schools through the Year R provisions.
- In January 2019 the Early Years team was extended to work with children with SEND in Year R for one year as part of the High Needs Block Early Intervention Project.
- The additional spend of £300k per annum would enable the provision of additional advisory teachers and some specialist practitioner time and all Year R provision in Central Bedfordshire to be appropriately supported.
- The current staffing level of 5 teachers and 8 Early Years practitioners would remain the same. The team would work across the piece to ensure a seamless transition.
- All maintained schools and academies in Central Bedfordshire would be able to access this provision.
- Part of the project included the development of a toolkit with the aim of all schools being able to use this resource independently.

**NOTED**

the updated allocation of the Early Years Block 2019/2020 and the spend to the end of July.

**RESOLVED**

that the additional spend on the Early Years SEND team be agreed.

5. High Needs Block 2018/2019


Points and comments included:

- A revised allocation was issued in July 2019 which increased the High Needs Block allocation to £29,062,896.
- A range of approaches discussed at a previous meeting of the Schools Forum as future mitigations for the overspend on the High Needs Block were now in place.
- Similar lines of spend such as Post 16 had been updated and consolidated where possible to provide greater clarity of the budget and forecast spend.
- Spend for out of county placements remained high. Work that had taken place to look at out of county placements had resulted in the identification of 6 children who could potentially be placed back in county.
- Concern was expressed that all Special Schools in Central Bedfordshire were full and over capacity. Planning needed to be in place to accept children placed back in county, especially those with high needs.
• Work was taking place to address the overspend as part of Schools Improvement and Schools for the Future which included the development of the existing provision.
• The Head of SEND advised that the data had shown EHCP Needs Assessments in Central Bedfordshire had 21% completion in terms of the final plan being issued within 20 weeks in January 2018. In January 2019 they were at 75% with a number of months this year over 80% with some 100% achievement.

**NOTED**

the current spend against budget for 2019/20.

6. **Schools Forum Budget update 2019/20**

The Schools Forum received an update on the current position of School Forum Budget.

Points and comments included:

• A budget of £3,000 for 2019/20 had been set for costs associated with the operation of the Forum, with the continued membership of the F40 group and £2,000 delegated to the Chairman of the Schools Forum to fund the commissioning of consultancy and administration support. The level of the budget would be reviewed annually.
• The budget amount of £11,684 included a carry forward amount of £8,684 from 2018/19 and a budget allocation of £3,000 for 2019/20.
• Total spend to date was £768.00.
• The current balance was £10,916. The costs for an external presenter and venue hire for the induction programme for Schools Forum members in September and October 2019 would be taken from the Schools Forum Budget.

**NOTED**

the School Forum spend for year to 31 July 2019.

7. **Dedicated Schools Grant (DSG)**

The Schools Forum received an update on the use of the Dedicated Schools Grant for the financial year 2019/20 and funding arrangements for 2020/21.

Points and comments included:

• The Dedicated School Grant would continue to have four blocks; Schools, Central School Services, Early Years and High Needs.
• The ESFA had updated the allocations for each block in July 2019. The Early Years Block had been updated based on the January 2019 census and had increased by £737k.
• The High Needs Block had also been updated for the import/export adjustment based on the January 2019 census and had been increased by £141k.
• There was a carry forward to 2019/20 of £1,337,980.
• The DfE had released a consultation seeking the views on the implementation of the mandatory minimum per pupil funding levels in the national funding formula for 2020/21 which are to be used by local authorities in their local formula. Central Bedfordshire Council would be submitting a response on behalf of schools in the area. Schools were also encouraged to submit individual responses to the consultation. The closing date for submission of responses was 22 October 2019.

NOTED

the update to the 2019/20 Dedicated School Grant (DSG).

8. Dedicated School Grant Contingency Budgets

The Schools Forum received an update on the use of the Dedicated Schools Grant Contingency Budgets for the financial year 2019/20.

Points and comments included:
• The balance brought forward for 2019/20 of £274,921 is ring-fenced de-delegated funding for Maintained schools only of £123,776, £121,675 for all schools and £29,470 for the Ashton Middle School Fund Account Balance.
• The amount of £10,475 of unallocated DSG for 2019/20 had been added to School Contingency.
• Adjustments of £67,991 had been made to the budgets for Maple Tree Primary School and £27,406 to Fairfield Park Lower School.
• The Assistant Director Education explained that the adjustment made to the budget for Fairfield Park Lower School was due to its split site. The adjustment made to the budget for Maple Tree Primary School related to the decision in 2017/18 to change the age range at the school and the agreement from the Regional Schools Commissioner to close Sandye Place Academy. This had resulted in Maple Tree Primary School accommodating 22 pupils in 2018 at the request of the local authority which the school was not funded for. Funding was usually part of a co-ordinated change and disapplication process but due to time constraints Schools Contingency was used to fund this process. A meeting was being arranged with Sandye Place Academy to look the remaining funding when the Academy formally closed at end of year.
• There was no carry forward for the High Needs Contingency as the block was overspent and funded by reserves.
• The recoupment adjustment of £445,191 following a reduction in post-16 places, the allocation of £306,000 import/export adjustment to the High Needs Block and an allocated amount of £2,300 has resulted in a current budget of £753,491.
• High Needs Contingency would be used to fund any overspend in the High Needs Post-16, EHCP and provision top-ups. If the forecast overspend on these budgets continued to increase as the year progressed there is the risk that the contingency budget will be insufficient to fund, and the block may overspend.
• Early Years Contingency had a current balance of £1,897,128. Funding may be required for adjustments to PVI, school and academy payments for census updated for both universal 15 hours and the additional 15 hours entitlement.
• Central School Services Contingency has a balance of £181,028 with no anticipated further spend this financial year.
NOTED

the Dedicated School Grant (DSG) Contingency spend for the financial year 2019/20 to 31 July 2019.

9. School Finance update

The Schools Forum received an update on the school surplus balances at 31 March 2019 and current RAG rating.

Points and comments included:
- The balance control mechanism in the Scheme of Financing Schools for 2016/17, section 4.2 defines excess balances as 10% (secondary and Special schools) and 15% (Nursery and Primary schools) of the current year’s individual school budget share.
- The Schools Finance team reviewed schools returns and examined funds declared as committed against agreed criteria and challenged as appropriate. Nine schools were identified as holding excess uncommitted balances, one nursery, five lower schools, two middle schools and one Special School.
- A sub-group of Maintained School representatives would be convened to consider the explanations provided by the schools and make recommendations back to the Authority. An update would be given at the November meeting of the Schools Forum.
- Following the year end and confirmation of the 2018/19 balances held by schools, schools had been assessed and risk rated against the criteria agreed by the Schools Forum. The number of schools rated red had increased by two in comparison with August 2018. The increase was a result of an increasing number of schools forecasting a deficit budget at March 2020.

NOTED

- the list of schools holding excess surplus balances to be reviews at the Sub-Group meeting
- the Finance RAG rating for schools.

10. SEND Workstreams update

The Schools Forum received a presentation on the Children’s Services Early Intervention project – SALT.

Caroline Clough, Speech and Language Therapist, Central Bedfordshire Council gave an overview of the Early Years work stream.

Points and comments included:
- The rationale for the workstream was to empower schools in supporting children with Speech Language and Communication Needs.
- The workstream commenced in June 2019 and would run through to March 2020.
- The toolkit for SENDCo's was aimed at children from Year 1 although it was hoped that there would be flexibility to include Reception Year.
- Research has shown that children with speech, language and communication needs were at risk of exclusion and have poor attainment at school. One of the aims of the toolkit was to reduce the number of children excluded from school and to provide them with the necessary support.
- The content of toolkit would include background information about speech, language and communication skills and issues such as Developmental Language Disorder. The aim was to create a protocol for schools to use to assist with early identification which supports a universal, targeted and specialist approach. The toolkit also would include guidance about the referral process in terms of who to refer to and when and other specialist support that should be considered such as Educational Psychologists. There would also be a section on English as an Additional Language.
- The toolkit is not a document to stop referrals to the team. Referrals can be made straightway or after the child has received targeted support. The toolkit refers to the benefits of having targeted support first, to support referrals being made at the right time with the right information.
- School visits had highlighted that assessments might be being used but that the next steps were not always be taken. This is where the toolkit would be of benefit.
- Work had also taken place to look at local pathways and current provision in Central Bedfordshire and a questionnaire sent to schools regarding the current training provision. Discussions had also taken place at PAN Bedfordshire meetings, CBC working groups and with other professionals.
- There is the recognition that the toolkit is a small part of this process. Thought needed to be given about how the toolkit fits into wider workforce, training and the development model.
- The progression tools (which it was hoped would be part of the toolkit) are for non-speech and language specialists to use. Guidance documents and videos are provided by the communication trust which explain how to use the progression tools. The provision of training/workshops to support schools in using the toolkit was being looked at.
- The vision and next steps include children having access to the right level of support at the right time and every child benefiting from an environment that supports speech and language development.
- Three school SENDCos had undergone the training for the toolkit. An initial pilot would take place with a few select schools followed by wider presentations in the spring / summer of 2020. The toolkit would then be rolled out within the High Needs Block project.

NOTED

the presentation on the SALT Early Intervention workstream.

11. Work Programme

Members received and considered the Work Programme for the Central Bedfordshire Schools Forum.
RESOLVED

that the Work Programme be approved subject to the following additions:

18 November 2019
• Update on the review of academy budgets
• Early Years and High Needs Block (verbal updates)
• Presentations on two SEND workstreams
• Update on Schools for the Future and funding following pupils

13 January 2020
• Early Years and High Needs Block (written updates)

12. Exclusion of the Press and Public

13. Review and repurposing of the Jigsaw Service

The Schools Forum received a report on the review and repurposing of the Jigsaw Service.

RESOLVED

that the principal of providing additional funding by a transfer from the Dedicated Schools Grant Schools Block to the High Needs Block to support the implementation of the proposal, once the regulations and allocations for 20120/21 are available be agreed.

14. Date of the Next Meeting

Monday 18 November 2019
3. Chair's Announcements and Communications

To receive any announcements from the Chair and any matters of communication.
4. Schools Forum Powers and Responsibilities
## Schools forum powers and responsibilities

A summary of the powers and responsibilities of schools forums.

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<th>Local authority</th>
<th>Schools forum</th>
<th>DfE role</th>
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<tbody>
<tr>
<td>Formula change (including redistributions)</td>
<td>Proposes and decides</td>
<td>Must be consulted [voting restrictions apply - see schools forum structure document] and informs the governing bodies of all consultations</td>
<td>Checks for compliance with regulations</td>
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<tr>
<td>Movement of up to 0.5% from the schools block to other blocks</td>
<td>Proposes</td>
<td>Decides</td>
<td>Adjudicates where schools forum does not agree local authority proposal</td>
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<tr>
<td>Contracts (where the local authority is entering a contract to be funded from the schools budget)</td>
<td>Proposes at least one month prior to invitation to tender, the terms of any proposed contract</td>
<td>Gives a view and informs the governing bodies of all consultations</td>
<td>None</td>
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<td>Function</td>
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<td>Schools forum</td>
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<td>Financial issues relating to:</td>
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<td>None</td>
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<td>• arrangements for pupils with special educational needs, in particular</td>
<td>Consults annually</td>
<td>Gives a view and informs</td>
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<td>the places to be commissioned by the local authority and schools and</td>
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<td>the governing bodies of all</td>
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<td>the arrangements for paying top-up funding</td>
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<td>• arrangements for use of pupil referral units and the education of</td>
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<td>children otherwise than at school, in particular the places to be</td>
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<td>commissioned by the local authority and schools and the arrangements</td>
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<td>for paying top-up funding</td>
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<td>• arrangements for early years provision</td>
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<td>• administration arrangements for the allocation of central government</td>
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<td>grants</td>
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<td>Minimum funding guarantee (MFG)</td>
<td>Proposes any exclusions</td>
<td>Gives a view</td>
<td>Approval to application for</td>
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<td>from MFG for application</td>
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<td>exclusions</td>
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<td>Carry forward a deficit on central expenditure to the next year to be</td>
<td>Proposes</td>
<td>Decides</td>
<td>Adjudicates where schools</td>
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<td>funded from the schools budget</td>
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<td>forum does not agree local</td>
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<td>authority proposal</td>
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<td>Function</td>
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<td>Any brought forward deficit on de-delegated services which is to be met by the overall schools budget.</td>
<td>Proposes</td>
<td>Decides</td>
<td>Adjudicates where schools forum does not agree local authority proposal</td>
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<td>De-delegation for mainstream maintained schools for:</td>
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<td>• contingencies</td>
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<td>• administration of free school meals</td>
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<td>• licences/subscriptions</td>
<td>Proposes</td>
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<td>• staff costs – supply cover</td>
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<td>• support for minority ethnic</td>
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<td>• pupils/underachieving groups</td>
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<td>• behaviour support services</td>
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<td>• library and museum services</td>
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<td>• School improvement</td>
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<td>General Duties for maintained schools</td>
<td>Proposes</td>
<td>Would be decided by the relevant maintained school members (primary,</td>
<td>Adjudicates where schools forum does not agree local authority proposal</td>
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<td>• Contribution to responsibilities that local authorities hold for maintained schools</td>
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<td>Function</td>
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<td>(please see <a href="#">pre 16 schools funding operational guide</a> for more information)</td>
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<td>Central spend on and the criteria for allocating funding from:</td>
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<td>• funding for significant pre-16 <a href="#">pupil growth</a>,</td>
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<td>including new schools set up to meet basic need, whether maintained or academy</td>
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</tr>
<tr>
<td>• funding for good or outstanding schools with <a href="#">falling rolls</a></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>where growth in pupil numbers is expected within three years</td>
<td>Proposes</td>
<td>Decides</td>
<td></td>
</tr>
<tr>
<td>Central spend on:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• early years block provision funding to enable all schools to meet the infant class size requirement</td>
<td>Proposes</td>
<td>Decides</td>
<td></td>
</tr>
<tr>
<td>• back-pay for equal pay claims</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• remission of boarding fees at maintained schools and academies</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• places in independent schools for non-SEN pupils</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• admissions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• servicing of schools forum</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Published September 2018*
<table>
<thead>
<tr>
<th>Function</th>
<th>Local authority</th>
<th>Schools forum</th>
<th>DfE role</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Contribution to responsibilities that local authorities hold for all schools</td>
<td></td>
<td>Proposes up to the value committed in the previous financial year and where expenditure has already been committed.</td>
<td>Adjudicates where schools forum does not agree local authority proposal</td>
</tr>
<tr>
<td>Central spend on:</td>
<td>Capital expenditure funded from revenue – projects must have been planned and decided on prior to April 2013 so no new projects can be charged</td>
<td>Decides for each line</td>
<td></td>
</tr>
<tr>
<td>• Contribution to combined budgets – this is where the schools forum agreed prior to April 2013 a contribution from the schools budget to services which would otherwise be funded from other sources</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Existing termination of employment costs (costs for specific individuals must have been approved prior to April 2013 so no new redundancy costs can be charged)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Prudential borrowing costs – the commitment must have been approved prior to April 2013</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Central spend on:</td>
<td>High needs block provision</td>
<td>None, but good practice to inform forum</td>
<td>None</td>
</tr>
<tr>
<td>• Central licences negotiated by the Secretary of State</td>
<td>Decides</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Function</td>
<td>Local authority</td>
<td>Schools forum</td>
<td>DfE role</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Scheme of financial management changes</td>
<td>Proposes and consults the governing body and Head of every school</td>
<td>Approves (schools members only)</td>
<td>Adjudicates where schools forum does not agree local authority proposal</td>
</tr>
<tr>
<td>Membership: length of office of members</td>
<td>Decides</td>
<td>None (but good practice would suggest that they gave a view)</td>
<td>None</td>
</tr>
<tr>
<td>Voting procedures</td>
<td>None</td>
<td>Determine voting procedures</td>
<td>None</td>
</tr>
<tr>
<td>Chair of schools forum</td>
<td>Facilitates</td>
<td>Elects (may not be an elected member of the Council or officer)</td>
<td>None</td>
</tr>
</tbody>
</table>
Reports
Proposals
5. Growth Fund for New School Places

To receive a report on the outcome of some early modelling undertaken by the Council, following the DfE’s formulaic approach to the allocation of the Growth Funding for 2020/21, the possible impact of the new formulae on the level of funding the Council receives to fund schools that have expanded under the New School Places Programme, risk to the standardised payment and to seek approval to continue to implement the Growth Fund standardised payment for 2020/21.
Central Bedfordshire Council

Schools’ Forum 18 November 2019

Growth Fund for New School Places

Report of: Cllr Sue Clark, Executive Member for Families, Education and Children (Sue.Clark@centralbedfordshire.gov.uk)

Responsible Director(s): Sue Harrison, Director of Children Service, (sue.harrison@centralbedfordshire.gov.uk)

Purpose of this report

1. To advise the Schools Forum on:
   - the outcome of some early modelling undertaken by the Council, following the DfE’s formulaic approach to the allocation of the Growth Funding for 2020/21.
   - the possible impact of the new formulae on the level of funding the Council receives to fund schools that have expanded under the New School Places Programme.
   - The risk to the standardised payment

2. To seek approval to continue to implement the Growth Fund standardised payment for 2020/21, (Appendix 1).

RECOMMENDATIONS

The Schools Forum is asked to:

1. Note the early modelling for the Growth Fund and the indicative allocation from the DfE.

2. Approve the indicative value of the Growth Fund of £1,723,611 to be centrally retained for 2020/21, subject to the DfE announcement in December 2019.

3. Approve the Growth fund criteria and payment of £776,000 to the schools commissioned by the Council for 2020/21.
DfE Formulaic Approach

3. In 2019/20, the DfE introduced a new formulaic approach to the allocating of growth funding to local authorities. The DfE state the aim of the new arrangements is to ensure that the funding is distributed fairly and consistently across authorities. This is proposed to be a change on how the amount has been historically allocated in Central Bedfordshire. This is the formula that will be used for 2020/21.

4. Under the new formulaic approach, the DfE has stated that growth fund allocations for 2020/21 will be based on growth between October 2018 and October 2019. The DfE has not reflected the new growth approach in the updated illustrative allocations published with the NFF information. To understand the implications of the new formulaic approach the Council has undertaken some early modelling based on existing admission data for 2019 (as the 2019 Census has not been validated at the time of writing this paper) to try and understand the potential implications for Central Bedfordshire.

5. The new formulaic approach is based on the recommended DfE measures at middle layer super output area (MSOA) level. These are proposed as they are small enough geographical areas to detect ‘pockets’ of growth within local authorities. When the DfE release the allocations, the formulae will measure growth by counting the increase in pupil numbers in each MSOA in the local authority between the two most recent October censuses. Only positive growth in the one area, and negative growth in another, will not be denied growth funding.

6. The primary and secondary pupil new formulaic approach for funding each local authority for 2020/21, will be at MSOA:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>£1,425 for each primary ‘growth’ pupil</td>
</tr>
<tr>
<td>2</td>
<td>£2,130 for each secondary ‘growth’ pupil</td>
</tr>
<tr>
<td>3</td>
<td>£65,000 for each brand new school that opened in the previous year (that is any school not appearing on the October 2018 census but not appearing on the October 2019 census)</td>
</tr>
</tbody>
</table>

Growth Fund modelling

7. Central Bedfordshire has historically sought support to top slice the growth fund from the school’s block and for 2019/20 the Schools Forum endorsed the total sum of £1,355,693 for the Growth Fund. A technical Sub Group made up of the following members below, from the Schools Forum, review and recommend the funding arrangements:
8. For the financial year 2017/18, Schools Forum also agreed to award Growth Fund payments to the eligible schools and academies through a ‘standardised payment package’, to replace the previous applications model. This has reduced the bureaucracy of allocations and the increased transparency of the spending. Schools Forum were updated on the successful implementation in January 2018 and were asked to endorse the standardised payment package for the 2019/20. This standardised packing will continue to be used in 2020/21, subject to approval from Schools Forum.

9. In the Council’s modelling, to best understand the impact of the national funding formula in 2020/21 compared to 2019/20, the amounts have been based on the October 2018 census and the Admissions data October 19 (as at the time of writing this paper the October census 2019 is not available).

10. Based on the new formulaic approach and the October 2018 and the latest admissions data the Council is due to receive the following growth fund allocations:

<table>
<thead>
<tr>
<th>Growth in MSOA</th>
<th>Allocation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secondary age pupils</td>
<td>500</td>
</tr>
<tr>
<td>Primary age pupils</td>
<td>398</td>
</tr>
<tr>
<td>New School</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>898</strong></td>
</tr>
</tbody>
</table>

11. With the above modelling for growth in Central Bedfordshire it is envisaged that the total level of growth funding will be in the region of **£1,723,611.46** for 2020/21.

12. To understand if the proposed formulaic approach has any impact on the current Growth Fund standardised payment agreed by Schools Forum, the Council forecast the following expenditure for 2020/21.

<table>
<thead>
<tr>
<th>School</th>
<th>Status</th>
<th>Programme</th>
<th>Year</th>
<th>Award</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arnold</td>
<td>Middle</td>
<td>2017-2020</td>
<td>4 of 4</td>
<td>£51,769</td>
</tr>
<tr>
<td>Biggleswade</td>
<td>Lower expansion</td>
<td>2016-2020</td>
<td>5 of 5</td>
<td>£51,269</td>
</tr>
<tr>
<td>Marston Moretayne</td>
<td>Lower</td>
<td>2018-2022</td>
<td>3 of 5</td>
<td>£51,269</td>
</tr>
<tr>
<td>Edward Peake</td>
<td>Middle</td>
<td>2020-2023</td>
<td>1 of 4</td>
<td>£110,478</td>
</tr>
<tr>
<td>Fairfield Park</td>
<td>Lower</td>
<td>2016-2020</td>
<td>5 of 5</td>
<td>£51,269</td>
</tr>
<tr>
<td>Gilbert Inglefield</td>
<td>Middle</td>
<td>2020-2023</td>
<td>1 of 4</td>
<td>£110,478</td>
</tr>
<tr>
<td>Holywell</td>
<td>Middle</td>
<td>2018-2021</td>
<td>3 of 4</td>
<td>£51,769</td>
</tr>
<tr>
<td>St Andrew’s</td>
<td>Lower</td>
<td>2017-2021</td>
<td>4 of 5</td>
<td>£150,807</td>
</tr>
<tr>
<td>Vandyke</td>
<td>Upper</td>
<td>2020-2022</td>
<td>1 of 3</td>
<td>£147,286</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>£776,394</strong></td>
</tr>
</tbody>
</table>
13. Based on the new DfE formulaic approach and using the available data from the existing census, the allocation is set out below against a forecast expenditure for 2020/21:

<table>
<thead>
<tr>
<th>School tier</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary</td>
<td>£629,108</td>
</tr>
<tr>
<td>Secondary</td>
<td>£147,286</td>
</tr>
<tr>
<td>Total</td>
<td>£776,394</td>
</tr>
</tbody>
</table>

14. Whilst the modelling would appear to indicate that the new formulaic approach is sufficient to meet the forecast expenditure, the actual sum cannot be confirmed until the DfE announcement.

15. Schools Forum are therefore advised to note the new formulaic approach and associated risk. To agree to payments for 2020/21 to schools based on the standardised payment package.

**Reason/s for decision**

16. The Growth Fund is required to support schools commissioned by the council to provide additional school places.

**Council Priorities**


**Legal Implications**

18. Section 14 of the Education Act 1996 places a duty on Councils to secure sufficient primary and secondary school places to provide appropriate education for pupils in its area. S14A of the Education Act 1996 imposes a duty to consider representations about the exercise by local authorities of their functions from the parents of qualifying children in relation to the provision of primary and secondary education. Qualifying children include all those of compulsory school age or under.
19. The Education and Inspections Act 2006 gives Councils a strategic role as commissioners of school places and includes duties to consider parental representation, diversity and choice, duties in relation to high standards and the fulfilment of every child’s educational potential and fair access to educational opportunity.

20. One of the overarching areas on which Schools Forum make decisions on local authority proposals are:

- to create a fund for significant pupil growth in order to support the local authority’s duty for place planning (basic need), including pre-opening and diseconomy of scale costs, and agree the criteria for maintained schools and academies to access this fund.

21. Regulations state that the local authority must consult the schools forum annually in connection with various schools budget functions, including the growth fund.

Financial and Risk Implications

22. These indicative figures show a potential £1m of unallocated growth funding for 2020/21. Until the October 2019 census is available and 2020/21 Dedicated School Grant (DSG) allocations are announced in December 2019 the actual allocation will not be known. Any growth funding allocation not centrally retained for that purpose can either be used to allocate to schools and academies through the local school funding formula for 2020/21 or transferred to other blocks within the DSG subject to the 0.5% threshold of the Schools Block as set out in the finance regulations.

Equalities Implications

1. Authorities have a statutory duty to promote equality of opportunity, eliminate unlawful discrimination, harassment and victimisation and to foster good relations in respect of the following protected characteristics: age, disability, gender re-assignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.

2. This statutory duty includes requirements to:
   - Remove or minimise disadvantages suffered by people due to their protected characteristics.
   - Take steps to meet the needs of people from protected groups where these are different from the needs of other people.
   - Encourage people from protected groups to participate in public life or in other activities where their participation is disproportionately low.

3. The proposal in the report is not envisaged to have an adverse impact on any of the listed groups below: -
   - Sex N/A
   - Gender Reassignment N/A
Conclusion and next Steps

4. Subject to agreement, Council officers will continue with the standardised payment package for schools commissioned under the New School Places Programme.

5. Council officers will continue to monitor growth fund allocation and expenditure. Schools Forum are advised of the risks and until the DfE announce the allocations for 2020/21 there is a potential for the Growth Fund Panel to seek additional funds from the Schools Forum to support commissioned schools.

Appendices

Appendix 1 – Standardised payment

Background Papers

None

Report author(s): Victor Wan (Head of School Organisation & Capital Planning) and Justine Claridge (School Organisation Officer)

Victor.wan@centralbedfordshire.gov.uk
Justine.claridge@centralbedfordshire.gov.uk
2020/21 Growth Fund Payment Package

1FE (form of entry) expansions

Pupil led funding

25 X AWPU for each class commissioned by the LA to open in the first year at the new site:

<table>
<thead>
<tr>
<th>Key Stage</th>
<th>AWPU per child</th>
<th>Annual award</th>
<th>7/12\textsuperscript{th} (Sep-Mar)</th>
<th>5/12\textsuperscript{th} (Apr-Aug)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>£3,005</td>
<td>£75,125</td>
<td>£43,823</td>
<td>£31,302</td>
</tr>
<tr>
<td>2</td>
<td>£3,005</td>
<td>£75,125</td>
<td>£43,823</td>
<td>£31,302</td>
</tr>
<tr>
<td>3</td>
<td>£4,267</td>
<td>£106,675</td>
<td>£62,227</td>
<td>£44,448</td>
</tr>
<tr>
<td>4</td>
<td>£4,976</td>
<td>£124,400</td>
<td>£72,567</td>
<td>£51,833</td>
</tr>
</tbody>
</table>

Academies will receive the annual award whilst maintained schools will receive seven twelfths.

The payment period would be as follows:
- Lower school: 5 years
- Primary school: 7 years
- Middle school: 4 years
- Secondary school: 5 years
- Upper school: 3 years

Staffing (lead in costs)

£750 A class room set up cost will be awarded (per new class established) for the setting up of the classroom prior to the first academic year of operation.

Recruitment (per class established in first year of opening)

Lower/primary schools:

<table>
<thead>
<tr>
<th>Item</th>
<th>Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advert</td>
<td>£1,500</td>
</tr>
<tr>
<td>DBS/CRB checks (x4)</td>
<td>£176</td>
</tr>
<tr>
<td>Medical checks (x4)</td>
<td>£20</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>£1,696</strong></td>
</tr>
</tbody>
</table>

Middle/secondary/upper schools:

<table>
<thead>
<tr>
<th>Item</th>
<th>Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advert</td>
<td>£2,000</td>
</tr>
<tr>
<td>DBS/CRB checks (x4)</td>
<td>£176</td>
</tr>
<tr>
<td>Medical checks (x4)</td>
<td>£20</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>£2,196</strong></td>
</tr>
</tbody>
</table>
The recruitment costs above are to cover all appointments relating to the additional class (class teacher, TA/LSA, midday supervisor and cleaner). Should a school be unable to recruit to a post they can request that a second payment is made for the additional advert cost (evidence will be required).

The payment period would be as follows:
- Lower school: 5 years
- Primary school: 7 years
- Middle school: 4 years
- Secondary school: 5 years
- Upper school: 3 years

**One off lead in costs (first year of programme only)**

<table>
<thead>
<tr>
<th>Description</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>To cover two additional Governing Body meetings</td>
<td>£300</td>
</tr>
<tr>
<td>Head teacher/senior leadership time</td>
<td>£5,000</td>
</tr>
<tr>
<td>Cost of one day supply cover per week to release a member of the senior leadership time to protect standards at the school. (£150 per day x 33 weeks (three terms))</td>
<td></td>
</tr>
<tr>
<td>Business manager/finance/project officer time</td>
<td>£2,640</td>
</tr>
<tr>
<td>(£20 per hour including on costs) 6 hours per day x 1 day per week x 22 weeks (two terms)</td>
<td></td>
</tr>
<tr>
<td>Site agent time with contractors</td>
<td>£1,000</td>
</tr>
<tr>
<td>To cover 2 weeks at 37 hours per week overtime</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>£8,940</strong></td>
</tr>
</tbody>
</table>

**Extending curriculum resources**

<table>
<thead>
<tr>
<th>Description</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Per commissioned class for the programme period.</td>
<td>£5,000</td>
</tr>
</tbody>
</table>

**Exceptional Circumstances**

Costs accrued by a school/academy which are unforeseen and not in the control of the school, for example, a result of a delay in the expansion build, will be considered by the Technical Sub Group for reimbursement (invoices will be required). This is subject to approval by the Schools Forum. Exceptional circumstances are considered case by case.

**Expansions greater than one form of entry**

If a school is to be expanded by more than one form of entry in an academic year then the following formula applies:
<table>
<thead>
<tr>
<th>Category</th>
<th>One FE</th>
<th>Two FE</th>
<th>Three FE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pupil led funding</td>
<td>A stated</td>
<td>2 x amount</td>
<td>3 x amount</td>
</tr>
<tr>
<td>Staffing – class set up</td>
<td>As stated</td>
<td>2 x amount</td>
<td>3 x amount</td>
</tr>
<tr>
<td>Recruitment – advert costs</td>
<td>As stated</td>
<td>No additional</td>
<td>No additional</td>
</tr>
<tr>
<td>Recruitment - DBS costs</td>
<td>As stated</td>
<td>2 x amount</td>
<td>3 x amount</td>
</tr>
<tr>
<td>Recruitment – Medical check costs</td>
<td>As stated</td>
<td>2 x amount</td>
<td>3 x amount</td>
</tr>
<tr>
<td>Governance</td>
<td>As stated</td>
<td>No additional</td>
<td>No additional</td>
</tr>
<tr>
<td>Business management costs</td>
<td>As stated</td>
<td>No additional</td>
<td>No additional</td>
</tr>
<tr>
<td>Extending curriculum resources</td>
<td>As stated</td>
<td>2 x amount</td>
<td>3 x amount</td>
</tr>
</tbody>
</table>
6. Schools for the Future - financial implications for growth and age of transition

To receive a report on the revenue funding implications for schools as a result of accommodating growth and by changing the age of transition and to seek approval for a working group to review processes to ensure funding follows the pupils and to minimise the impact of change on schools.
Purpose of this report

1. The purpose of this report is to:
   
   • advise the Schools Forum of the revenue funding implications for schools as a result of accommodating growth and by changing the age of transition.

2. To seek approval for a working group to review processes to ensure funding follows the pupils and to minimise the impact of change on schools.

RECOMMENDATIONS

The Schools Forum is asked to:

1. Note the risk to school finances associated with revenue gaps due to the lag between census data submitted and increased pupil numbers attending schools either through growth or age of transfer changes.

2. Agree to set up a working group to review the financial implications of a change of age range and the use of the dis-application process to ensure funding follows the pupils it is allocated for.

3. Provide financial direction and approvals for growth funding for more than a year at a time to provide certainty for schools and enable them to plan their finances.

Background

3. Guidance from the Department for Education (DfE) is that schools funding allocations are based on pupil numbers from the October schools census from the preceding year. Schools that have additional pupils above those reported in this census due to growth in basic need places requested by the local authority have been eligible to apply to the Schools Forum sub technical group for growth funding.
4. The main factor being the difference in numbers between the census and those pupils on role as of the start of the following academic year is largely down to population growth and the need to expand a school in order to accommodate the increased numbers of pupils in the area.

5. Due to the significant growth forecast in Central Bedfordshire, as a result of the Local Plan, Central Bedfordshire Council has initiated the Schools for the Future (SFF) programme to ensure that there are sufficient school places for pupils in the authority.

6. As well as ensuring sufficient school places, the SFF programme has been working with clusters of schools to review the educational landscape to provide clearer educational pathways for children and fewer transition points. There is a will for schools to change the age of transition from a three-tier model to primary / secondary model of education.

Potential Revenue Funding Deficits

7. A consequence of changing to the 2-tier model is that schools will be taking on additional pupils in year groups that would not have been accounted for in their previous year’s census return. These pupils will not be accounted for until the following year.

8. This potentially puts each school altering their age of transition at a financial disadvantage with their revenue budget in the year of transition as funding is allocation for the whole financial year to the school where the pupil was recorded on the termly census the previous October.

9. Lower schools wishing to convert to a primary (see figure 1) will have a revenue deficit of funding for a whole year group for two consecutive years as they increase the numbers on role as they retain the pupils in YR4 going into YR5 and then the following year YR5 going in to YR6. This is likely to affect 44 schools.

Figure 1: Lower to Primary school pupil progression

<table>
<thead>
<tr>
<th>Final Lower Year</th>
<th>Yr R</th>
<th>Yr 1</th>
<th>Yr 2</th>
<th>Yr 3</th>
<th>Yr 4</th>
<th>Funding gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Year 1</td>
<td>Yr R</td>
<td>Yr 1</td>
<td>Yr 2</td>
<td>Yr 3</td>
<td>Yr 4</td>
<td>Yr 5</td>
</tr>
<tr>
<td>Primary Year 2</td>
<td>Yr R</td>
<td>Yr 1</td>
<td>Yr 2</td>
<td>Yr 3</td>
<td>Yr 4</td>
<td>Yr 5</td>
</tr>
</tbody>
</table>

10. Middle schools changing to become a primary school (see figure 2) would gain a surplus in their revenue funding by two year groups in year 2 of the transition, but subsequently be in deficit in the following four years for one year group. This is likely to affect 7 schools.
11. Middle schools becoming secondary schools (see figure 3) will have a revenue deficit in the third year of transition. This is likely to affect 7 schools.

**Figure 3: Middle to Secondary school pupil progression**

<table>
<thead>
<tr>
<th>Final year as Middle</th>
<th>Yr 5</th>
<th>Yr 6</th>
<th>Yr 7</th>
<th>Yr 8</th>
<th>Funding gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Year 1</td>
<td>Yr R</td>
<td></td>
<td>Yr 6</td>
<td>Yr 7</td>
<td>Yr 8</td>
</tr>
<tr>
<td>Primary Year 2</td>
<td>Yr R</td>
<td>Yr 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary Year 3</td>
<td>Yr R</td>
<td>Yr 1</td>
<td>Yr 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary Year 4</td>
<td>Yr R</td>
<td>Yr 1</td>
<td>Yr 2</td>
<td>Yr 3</td>
<td></td>
</tr>
<tr>
<td>Primary Year 5</td>
<td>Yr R</td>
<td>Yr 1</td>
<td>Yr 2</td>
<td>Yr 3</td>
<td>Yr 4</td>
</tr>
<tr>
<td>Primary Year 6</td>
<td>Yr R</td>
<td>Yr 1</td>
<td>Yr 2</td>
<td>Yr 3</td>
<td>Yr 4</td>
</tr>
</tbody>
</table>

12. Upper schools becoming secondary schools (see figure 4) will incur a 2 year group revenue funding deficit in the second year of their transition. This is likely to affect 4 schools.

**Figure 4: Upper to Secondary school pupil progression**

<table>
<thead>
<tr>
<th>Final year as Upper</th>
<th>Yr 9</th>
<th>Yr 10</th>
<th>Yr 11</th>
<th>Yr 12</th>
<th>Yr 13</th>
<th>Funding gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secondary Year 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>nil</td>
</tr>
<tr>
<td>Secondary Year 2</td>
<td>Yr 7</td>
<td>Yr 8</td>
<td>Yr 9</td>
<td>Yr 10</td>
<td>Yr 11</td>
<td>Yr 12</td>
</tr>
<tr>
<td>Secondary Year 3</td>
<td>Yr 7</td>
<td>Yr 8</td>
<td>Yr 9</td>
<td>Yr 10</td>
<td>Yr 11</td>
<td>Yr 12</td>
</tr>
</tbody>
</table>
Measures to address the funding gap

13. It is recommended that a working group be established to consider the implications of these changes and to ensure that the funding gap due to age of transition was coordinated in line with the transition for each of the school clusters and the phasing of each of the schools within the cluster.

Dis-application process

14. As part of the review, consideration should be given as to whether whole year group cohorts moving between schools could be dealt with through dis-application.

15. Dis-application is a process to request the Secretary of State for Education to adjust pupil numbers for specific schools from those recorded on the October census where they are expected to be significantly different in the following year. The revised pupil numbers are then used to calculate the school’s budget share and ensure funding follows pupils to the correct school for the start of the new academic year.

National Funding Formula – Growth Funding

16. Growth funding enables local authorities to support schools with significant in-year pupil growth, which is not otherwise immediately recognised by the lagged funding system.

17. The guidance given in the DfE guidance document ‘The National Funding Formula for Schools and High Needs 2019-20’ sets out in relation to growth funding that the decisions as to how to allocate growth funding should continue to be done by each Local Authority.

“Local authorities should continue to make decisions about growth funding locally as they do now”.

18. The SFF programme is being developed to specifically tackle the issue of growth in local pupil numbers and it has been established by CBC Executive to support schools and clusters that want to work towards a primary and secondary model, considering that:

- the appropriate resources are in place to do so;
- change is coordinated; and
- change supports improvements in educational outcomes.

19. The timetable for implementation must balance the need to ensure careful planning and preparation with the need to minimise the period of uncertainty. This will help to ensure that the focus will be on ensuring continuity for schools and the pupils they serve.
20. In September 2017 Schools’ Forum agreed to implement the Standard payment package for Growth Fund. This has now been in place for the financial years 2017/18, 2018/19 and 2019/20. This replaced the previous payment model by application.

21. The standard payment package includes an application process for schools seeking to claim Growth Funding under exceptional circumstances. Exceptional circumstances are reviewed case by case by the technical sub group and a recommendation is made to Schools’ Forum.

22. It is recommended that, through the working group, consideration be given to agreeing growth funding for multiple years to cover the period of a school’s transition. This will reduce uncertainty for each school going through transition and allow them to plan their finances accordingly. Whilst future years could be considered in principle allocations can currently only be agreed on an annual basis by the schools forum once the arrangements have been announced by the DfE and will always be subject to the schools finance regulations for the relevant year.

Council Priorities

23. The report supports the priorities in Central Bedfordshire’s Five-Year Plan 2015-2020, and in particular Improving Education and Skills.

24. Delivery of the Schools for the Future project supports the following Council priority:

• Improving education and skills

Corporate Implications

25. None

Legal Implications

26. There will be statutory obligations to consult and a requirement to comply with the relevant statutory requirements for changes to individual schools which will emerge in due course.

27. The Executive Member for Families, Education and Children has the delegated power to exercise the Council’s duty to determine proposals to alter the upper and lower age range of pupils in schools as prescribed by School Organisation (Prescribed Alterations to Maintained Schools) (England) Regulations 2013. The Director of Children’s Services has the delegated authority to be responsible for the administration and planning of the review of organisation of schools within the Council’s area.
Financial and Risk Implications

28. Preliminary work has been carried out as the work is not without financial implication (which includes revenue implications). Costing can only be established once the intention for each cluster area is known – with detail being considered further after the next cluster meetings.

29. The New School Places Programme is funded by developer contributions and Basic Need grant income from the Department for Education (DfE) and S106 funding.

Equalities Implications

30. Central Bedfordshire Council has a statutory duty to promote equality of opportunity, eliminate unlawful discrimination, harassment and victimisation and foster good relations in respect of nine protected characteristics; age disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.

31. So as to consider local needs and implications, an Equality Impact Assessment will be carried out alongside the development of cluster plans – subject to agreement by Executive and the support of schools and clusters.

Next Steps

32. If the proposals are approved the review of growth funding applications for multiple years will take effect for any new applications made.

Appendices

33. None

Background Papers

34. None

Report author(s): Peter Fraser
Assistant Director, Education

Email address: peter.fraser@centralbedfordshire.gov.uk
7. Schools Funding formula 20/21
Consultation paper - to follow

To comment on the consultation document and agree that the document be circulated for consultation with all schools following receipt from the Department for Education.
For Information
8. Review of the Schools Forum Induction Programme

To receive a verbal update on the Schools Forum Induction Programme.
9. Early Years Block

To receive a verbal update on the Early Years Block.
10. High Needs Block

To receive a verbal update on the High Needs Block.
11. Dedicated Schools Grant (DSG)

To receive an update on the use of the Dedicated Schools Grant for the financial year 2019/20 and funding arrangements for 2020/21.
Purpose of this report
To provide an update on the use of the Dedicated Schools Grant for the financial year 2019/20 and funding arrangements for 2020/21.

RECOMMENDATIONS
The Schools Forum is asked to:

1. Note and comment on the update to the 2019/20 Dedicated School Grant

2. Note the school’s revenue funding arrangements for 2020/21.

Background

1. Local authorities receive allocations of Dedicated Schools Grant (DSG) to finance the Schools Budget in each authority. The full DSG received must be applied to the Schools Budget in each authority; although authorities may provide additional resources in support of the Schools Budget should they decide to do so.

2. The School and Early Years Finance (England) Regulations 2018 define the local authority education budgets (the non-schools education budget, the schools’ budget, the central expenditure and the Individual Schools Budget (ISB)). The regulations set out how local authorities are to allocate funding from the ISB to maintained schools and private, voluntary and independent providers of free early years provision (relevant early years providers) through a locally determined formula. The Minimum Funding Guarantee (MFG) for schools has been set as negative 1% per pupil.
Local Authority Assurance Statement

3 LAs are required to submit an annual outturn statement, confirming that the DSG received by the authority was fully deployed in support of the schools’ budgets in accordance with the conditions of the grant and The School and Early Years Finance (England) Regulations 2018. The statement also includes a Non-Maintained Special School (NMSS) statement and Fraud cases reported in schools statement.

4 The NMSS statement requires confirmation that based on the LAs work in reviewing Individual Placement Agreements for high needs pupils/students within NMSS, nothing has come to the local authority’s attention that causes them to believe that the learners reviewed were not correctly defined as high needs students.

5 The Fraud cases statement requires the confirmation of the number and value of fraud cases reported in schools and the number of those that have been investigated and, where appropriate, action taken.

DSG Budget Allocation 2019/20

6 On the 17 December 2018, the Minister of State for School Standards confirmed the school and early years funding allocations for 2019 to 2020. The announcement covered the DSG, the Education Services Grant (ESG) protections for academies and the Pupil Premium.

The DSG will continue to have four blocks

- the schools block is allocated on the basis of the schools block units of funding and actual costs for premises, growth and mobility announced in July 2018
- the central school services block is allocated on the per-pupil rates and historic commitments announced in July 2018
- the high needs block is based on the national funding formula announced in July 2018, with an additional £125 million allocated on the basis of the ONS projections for the 2 to 18 year old population in each local authority
- the early years block is allocated using the funding rates and calculations announced in November 2018.

7 The schools block for Central Bedfordshire Council (CBC) primary unit of funding being £3,858 and secondary £5,006. The unit of funding is multiplied by the October 2018 school census (primary – reception to year group 6 and secondary – year group 7 to 11). Those pupils not assigned to a year group are allocated to primary and secondary based on the age of the pupil (age 4 to 10 or age 11 to 15).

Pupils in special units and resource provisions are included in the pupil counts.
Recoupment for academies is based on data provided on the authority proforma tool (APT) submitted in January 2019 and updated throughout the year for in-year academy conversions and closures.

8 The central school services block which funds local authorities for their ongoing responsibilities for both academies and maintained schools has also been allocated on the basis of the latest pupil numbers, in line with December’s announcement (£32.59 unit of funding multiplied by the number of pupils recorded in the October 2018 school census in reception to year group 11, and those aged 4 to 15, not assigned to a year group).

A number of the services that are covered by funding that is held centrally are subject to a limitation of no new commitments or increases in expenditure from previous years. This limit does not now apply to admissions or the servicing of schools forums. Schools forum approval is required each year to confirm the amounts on each line. When using centrally held funding, local authorities must treat maintained schools and academies on an equivalent basis.

9 The early years block comprises funding for: the free early education entitlements for 3 and 4 year olds and disadvantaged 2 year olds, the early years Pupil Premium. The early years national funding formula rates for 3 and 4 year olds for 2019/20 were published on 17 November (£4.30 per hourly rate).

The ESFA updated these allocations in July 2019, based on January 2019 census numbers. A further update will be made in July 2020, based on five twelfths of the January 2019 census numbers (to cover the April to August 2019 period), and seven twelfths of the January 2020 census numbers (to cover the September 2019 to March 2020 period).

Additionally, the early years block includes an allocation for the early years disability access fund and the supplementary funding for maintained nursery schools.

10 The high needs block has been updated with the latest pupil numbers, following the publication of provisional allocations in September. The high needs funding block is a single block for local authorities’ pupils and students aged 0 to 24, with high needs. The block includes funding for pre-16 and post 16 places.

There is additional funding for 2 years across 2018/19 and 2019/20. This is based on the ONS projections for the 2 to 18 year-old population in each local authority and is £125 million for 2018/19 and 2019/20 nationally.

The import and export adjustment was updated in July 2019 to reflect the latest data from the January 2019 school census and the R06 of the 2018 to 2019 ILR.
The high needs place funding deduction has been based on the academic year 2019/20 for places directly paid for by the ESFA to institutions, or through the sixth form grant.

Special units and resourced provision are funded on the places reported and agreed through the place change notification process, not on the number of pupils reported on the 2019/20 APT. The pupil data from the APT is only used to identify whether places are occupied by pupils on the school roll funded at £6,000 or funded at £10,000.

Deductions have been made from DSG for pre-16 places in AP free schools opened before or during the 2015/16 academic year. Deductions are from the pupil’s home local authority, based on school census data. No deductions will be made from local authorities’ 2019/20 DSG for post 16 high needs places in AP free schools; these will be funded directly by the ESFA.

The table below reflects both the indicative allocation as at March 2019 and the updated allocation as at July 2019 for 2019/20.

<table>
<thead>
<tr>
<th>Block</th>
<th>Initial Allocation (M)</th>
<th>Total Initial Allocation (M)</th>
<th>Updated Allocation (M)</th>
<th>Total Updated Allocation (M)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schools</td>
<td>NFF allocation</td>
<td>172.437</td>
<td>172.437</td>
<td>172.437</td>
</tr>
<tr>
<td>Central Schools</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>NFF allocation</td>
<td>1.274</td>
<td>1.274</td>
<td>1.274</td>
</tr>
<tr>
<td>Early Years</td>
<td>3&amp;4 year olds universal funding</td>
<td>10.586</td>
<td>10.774</td>
<td>16.478</td>
</tr>
<tr>
<td></td>
<td>3&amp;4 year olds additional 15hrs</td>
<td>3.352</td>
<td>3.955</td>
<td></td>
</tr>
<tr>
<td></td>
<td>EYPP</td>
<td>0.104</td>
<td>0.107</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Two Year Olds funding</td>
<td>1.435</td>
<td>1.355</td>
<td></td>
</tr>
<tr>
<td></td>
<td>MNS Supplementary funding</td>
<td>0.202</td>
<td>0.225</td>
<td></td>
</tr>
<tr>
<td></td>
<td>DAF funding</td>
<td>0.062</td>
<td>0.062</td>
<td></td>
</tr>
<tr>
<td>High Needs</td>
<td>NFF allocation</td>
<td>25.450</td>
<td>25.450</td>
<td>29.063</td>
</tr>
<tr>
<td></td>
<td>Special school</td>
<td>2.649</td>
<td>2.649</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Import / export adjustment</td>
<td>0.165</td>
<td>0.306</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Additional allocation</td>
<td>0.658</td>
<td>0.658</td>
<td></td>
</tr>
<tr>
<td>Total Indicative Allocation DSG</td>
<td></td>
<td>218.374</td>
<td>219.252</td>
<td></td>
</tr>
</tbody>
</table>

This is unchanged from the allocation reported at the last meeting.
The following table represents the distribution of the 2019/20 DSG and the latest recoupment costs based on 58 academies as at September 2019.

<table>
<thead>
<tr>
<th>DSG</th>
<th>ISB Academies</th>
<th>Revised DSG</th>
<th>ISB Schools</th>
<th>Central Spend</th>
<th>LA</th>
<th>Academies</th>
</tr>
</thead>
<tbody>
<tr>
<td>£’000</td>
<td>£’000</td>
<td>£’000</td>
<td>£’000</td>
<td>£’000</td>
<td>£’000</td>
<td></td>
</tr>
<tr>
<td>School</td>
<td>172,437</td>
<td>(108,309)</td>
<td>64,128</td>
<td>62,086</td>
<td>2,042</td>
<td>0</td>
</tr>
<tr>
<td>Central Schools</td>
<td>1,274</td>
<td>0</td>
<td>1,274</td>
<td>0</td>
<td>1,274</td>
<td>0</td>
</tr>
<tr>
<td>EY</td>
<td>16,478</td>
<td>0</td>
<td>16,478</td>
<td>10,734</td>
<td>3,317</td>
<td>2,423</td>
</tr>
<tr>
<td>High Needs</td>
<td>29,063</td>
<td>(5,057)</td>
<td>24,006</td>
<td>9,929</td>
<td>9,841</td>
<td>4,248</td>
</tr>
<tr>
<td>Total</td>
<td>219,252</td>
<td>(113,366)</td>
<td>105,886</td>
<td>82,749</td>
<td>16,474</td>
<td>6,671</td>
</tr>
</tbody>
</table>

The table below details the DSG carried forward to 2019/20:

<table>
<thead>
<tr>
<th>Reserves</th>
<th>£</th>
</tr>
</thead>
<tbody>
<tr>
<td>School Specific Contingency</td>
<td>274,921</td>
</tr>
<tr>
<td>Central School Block Contingency</td>
<td>14,272</td>
</tr>
<tr>
<td>Early Years Contingency</td>
<td>344,872</td>
</tr>
<tr>
<td>School Forum</td>
<td>8,684</td>
</tr>
<tr>
<td>Facilities Time</td>
<td>36,927</td>
</tr>
<tr>
<td>Growth Fund</td>
<td>337,577</td>
</tr>
<tr>
<td>Two Year Old Funding</td>
<td>240,047</td>
</tr>
<tr>
<td>Disability Access Fund (DAF) and Early Years Pupil Premium (EYPP)</td>
<td>51,406</td>
</tr>
<tr>
<td>School Admission</td>
<td>34,363</td>
</tr>
<tr>
<td>HNB 0.5% tfr from Schools Block</td>
<td>594,911</td>
</tr>
<tr>
<td>Total</td>
<td>1,937,980</td>
</tr>
</tbody>
</table>

**DSG funding arrangements 2020/21**

On 11 October 2019 the Department for Education (DfE) published provisional school revenue funding allocations for 2020/21, for three of the four blocks of the dedicated schools grant; the school block, the high needs block, and the central school services block. Funding allocations for the early years block will be published later in the year.

This is the third year of the national funding formulae (NFF) for schools, high needs and central services. The DfE have updated the NFF for schools with new factor values and have also made some technical changes.

It is recognised that the introduction of the national funding formula represented a significant change. To provide stability for local authorities and schools through the transition, it has been confirmed that for 2020/21, as in previous years, each local authority will continue to a set a local schools formula, in consultation with local schools. These local formulae determine
individual schools' budgets. The government has confirmed its intention to move to a single ‘hard’ formula to determine every school’s budget and that they will work closely with local authorities and other stakeholders in making this transition in the future.

18 The key changes to the NFF for 2020/21 are:

- **minimum per pupil levels** will be set at £3,750 for primary schools and £5,000 for secondary schools. The primary level will rise to £4,000 in 2021/22. This includes all pupil-led funding factors such as Age Weighted Pupil Unit (AWPU), deprivation and prior attainment within the formula and not just the AWPU.
- The **funding floor** will be set at 1.84% to protect pupil-led per-pupil funding in real terms based on the individual school’s 2019/20 NFF allocation.
- There will be no NFF **gains cap**, so all schools attract their full allocations under the formula.
- A new formulaic approach to the **mobility factor** will be introduced replacing the historic spend allocation.

19 It has been confirmed that growth funding will be allocated on the same formulaic methodology as that introduced for 2019/20 and that teachers’ pay grant and teachers’ pension employer contribution grant will continue to be paid separately from the NFF for 2020/21. Local authorities will continue to manage their growth funding locally in 2020/21 as they have done for the last 2 years.

20 The high needs funding floor will increase to 8% from 1% in 2019/20 and the gain cap from 6% to 17% based on per head of population based on local authorities' high needs allocations for 2019/20.
The indicative 2020//21 allocations are shown in the table below:

<table>
<thead>
<tr>
<th>Schools block</th>
<th>2020/21 Provisional NFF Allocation Oct 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary unit of funding</td>
<td>£4,040.93</td>
</tr>
<tr>
<td>Headcount</td>
<td>24,778</td>
</tr>
<tr>
<td>Secondary unit of funding</td>
<td>£5,171.91</td>
</tr>
<tr>
<td>Headcount</td>
<td>14,316</td>
</tr>
<tr>
<td>Growth</td>
<td>£2,026,592</td>
</tr>
<tr>
<td>Premises and mobility factors</td>
<td>£3,108,881</td>
</tr>
<tr>
<td>Total School block</td>
<td>£176,191,211</td>
</tr>
</tbody>
</table>

| Central School Services block  |                                           |
| CSSB unit of funding          | £32.55                                     |
| Headcount                     | 39,094                                     |
| Total CSS block               | £1,272,613                                 |

| High Needs block              |                                           |
| ACA weighted Basic entitlement unit rate | £4,096.05                     |
| Pupils in Special schools/academies (Headcount) | 647                     |
| (A) Basic entitlement factor  | £2,650,143                                 |
| (B) Historic spend factor     | £11,851,260                                |
| (C) Population factor         | £9,703,523                                  |
| (D) FSM factor                | £1,067,732                                  |
| (E) IDACI factor              | £806,722                                    |
| (F) Bad health factor         | £976,265                                    |
| (G) Disability factor         | £1,433,348                                  |
| (H) KS2 low attainment factor | £1,347,432                                  |
| (I) KS4 low attainment factor | £1,390,395                                  |
| (J) Funding floor factor      | £0                                          |
| (K) Hospital education funding| £722,650                                    |
| Import/Export unit rate       | £6,000                                      |
| Headcount                     | 51                                          |
| Provisional import/export adjustment | £306,000                             |
| Total HN block                | £32,255,469                                 |

Other changes that have been made to local authority formulae funding arrangements are:

- Making the minimum per-pupil funding level a mandatory factor (a consultation on how to implement ran between 10 September and 22 October)
- Removing the funding floor factor
- Having the ability to set the minimum funding guarantee between +0.5% and +1.84%.
Local authorities will continue to be able to transfer up to 0.5% of their schools block to other blocks of the DSG with schools forum approval and after consultation with all schools. A disapplication will be required for transfers above 0.5%, or any amount without schools forum approval. The local authority can continue to transfer funding between other blocks with schools forum approval.

The local authority must engage in open and transparent consultation with all maintained schools and academies in the area, as well as with its school forum, about any proposed changes to the local funding formula including the method, principles and rules adopted. The DfE recognise that with funding levels and allocations being announced later in previous years that local authorities will have less time for modelling and that local consultations may be shorter as a result.

The consultation for 2020/21 with schools is taking place during November and December to ensure there is time to gain political approval before the APT deadline of 21 January 2020. Political ratification means approval in line with the authority's local scheme of delegation.

Legal Implications

There are no direct legal implications arising from this report.

Appendices

None

Background Papers

None

Report author(s): Sharon Bellamy
Acting Senior Finance Manager
Sharon.bellamy@centralbedfordshire.gov.uk
12. Dedicated School Grant Contingency Budgets update

To receive an update on the use of the Dedicated Schools Grant Contingency Budgets for the financial year 2019/20.
Purpose of this report
To provide an update on the use of the Dedicated Schools Grant Contingency Budgets for the financial year 2019/20.

RECOMMENDATIONS
The Schools Forum is asked to:

1. To note the Dedicated School Grant (DSG) Contingency spend for the financial year 2019/20 to 30 September 2019.

Background

1 From 2018/19 the Dedicated School Grant is split into four notional blocks; Schools, High Needs, Early Years and Central Services with each block holding its own contingency budget.

School Block

2 The Schools Specific Contingency Budget falls under Schedule 2 (Part 6) of The School and Early Years Finance (England) Regulations 2018; ‘Classes or descriptions of planned expenditure prescribed for the purposes of the Schools budget of a Local Authority which may be deducted from it to determine the Individual Schools Budget (ISB)’. Part 6 relates to items that may be removed from Maintained Schools’ Budget Shares (Primary and Secondary) by way of de-delegation. De-delegation is not an option for Academies, special schools, nurseries or PRUs.
Expenditure on the Schools Specific Contingency is central expenditure deducted for the purpose of ensuring that monies are available to enable an increase in a school’s budget share after it has been allocated; and where it subsequently becomes apparent that a governing body have incurred expenditure which it would be unreasonable to expect them to meet from the school’s budget share which may include expenditure in relation to:

- schools in financial difficulty
- the writing-off of deficits of schools which are discontinued, excluding any associated costs and overheads
- new, amalgamating or closing schools, or
- other expenditure where the circumstances were unforeseen when initially determining the school’s budget share.

**High Needs Block**

Contingencies are held centrally to fund unforeseen circumstances and any potential overspends in the centrally retained High Needs Budgets. This includes the funding of additional places and top up payments for those schools accepting pupils above the place funding provided in their initial budget allocation.

**Early Years Block**

Early Years provision is funded based on predicted total number of hours’ attendance of registered pupils. The LA must review the budget share when further information on actual hours of attendance is available, in accordance with Part 3 of The School and Early Years Finance (England) Regulations 2018. The Early Years Contingency budget has been set aside to fund the headcount adjustment that is allowable within the regulations.

**Central Services Block**

This was a new block for 2018/19. It was created from the existing funding streams previously held within the Schools Block: the DSG funding that was held centrally by the local authority for central services and the retained duties element of the Education Services Grant. This block funds ongoing responsibilities for Admissions, Schools Forum, Copyright Licenses and ongoing responsibilities for all schools. Any balance is held in a contingency.
Update

School Contingency

7 The following table sets out the expenditure to 30 September 2019

<table>
<thead>
<tr>
<th></th>
<th>BUDGET £</th>
<th>SPEND £</th>
<th>BALANCE £</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carry Forward from 2018/19</td>
<td>245,451</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Carry Forward from 2018/19</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ashton Middle School Fund a/c</td>
<td>29,470</td>
<td>(29,470)</td>
<td></td>
</tr>
<tr>
<td>Unallocated DSG 19/20</td>
<td>10,475</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pix Brook budget to be recouped</td>
<td>308,647</td>
<td>(302,215)</td>
<td></td>
</tr>
<tr>
<td>19/20 APT AWPU increase</td>
<td></td>
<td>(185,929)</td>
<td></td>
</tr>
<tr>
<td>SBS Adjust Maple Tree</td>
<td></td>
<td>(67,991)</td>
<td></td>
</tr>
<tr>
<td>SBS Adjust Fairfield Park</td>
<td></td>
<td>(27,406)</td>
<td></td>
</tr>
<tr>
<td>Recoupment adjustment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Sandye Place Academy closure)</td>
<td></td>
<td>229,161</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>594,043</strong></td>
<td><strong>(383,850)</strong></td>
<td><strong>210,193</strong></td>
</tr>
</tbody>
</table>

8 The balance brought forward to 2019/20 of £274,921 is ring-fenced de-delegated funding for maintained schools only of £123,776, £121,675 for all schools and £29,470 Ashton Middle School Fund Account balance.

9 Allocations have also been made from de-delegated funding for maintained schools for two schools whose initial budget allocations required corrections to be made. The regulations do not allow initial school budget shares to amended once they have been issued however the de-delegated contingency can be used to increase budgets after they have been allocated.

10 The school budget share for Pix Brook for 2019/20 £302,215 has been recouped by the ESFA following the opening of the school in September 2019 and the Ashton Middle School Fund Account has been transferred to the St Albans Diocesan Board of Education. Recoupment for the Schools Block has also been adjusted following the closure of Sandye Place Academy on 31 August 2019 resulting in £229,161 being returned representing their schools budget share for the period 1 September 2019 – 31 March 2020.

11 The current unspent balance of £210,193 is ring-fenced de-delegated funding of £28,379 for maintained schools only and £181,814 for all schools.
High Needs Contingency

12 The following table sets out the expenditure to 30 September 2019:

<table>
<thead>
<tr>
<th></th>
<th>BUDGET £</th>
<th>SPEND £</th>
<th>BALANCE £</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carry Forward from 2018/19</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19/20 unallocated High Needs Block</td>
<td>2,300</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Import / Export Initial Allocation</td>
<td>165,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Import / Export Adjustment</td>
<td>141,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recoupment Adjustment</td>
<td>445,191</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>753,491</strong></td>
<td>0</td>
<td><strong>753,491</strong></td>
</tr>
</tbody>
</table>

13 The current budget of £753,491 is after a reduction in post-16 place recoupment of £445,191, the allocation of £306,000 import / export adjustment to the High Needs Block and an unallocated amount of £2,300. The High Needs Post-16 and EHCP and provision top-ups budgets are forecasting an overspend as at September 2019 which will be offset against the contingency budget to ensure the High Needs Block remains within budget. There is a risk if forecast overspends on these budgets continue to increase as the year progresses that the contingency budget will be insufficient to fund, and the block may overspend.

Early Years Contingency

14 The following table sets out the expenditure to 30 September 2019:

<table>
<thead>
<tr>
<th></th>
<th>BUDGET £</th>
<th>SPEND £</th>
<th>BALANCE £</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carry Forward from 2018/19</td>
<td>344,871</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unallocated Early Years Block</td>
<td>497,996</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2018/19 Block adjustment</td>
<td>430,629</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2018/19 census adjustment adjustment</td>
<td>(156,188)</td>
<td>(35,232)</td>
<td></td>
</tr>
<tr>
<td>Allocation adjustment July 19</td>
<td>813,584</td>
<td></td>
<td></td>
</tr>
<tr>
<td>May 2019 census adjustment</td>
<td>(48,085)</td>
<td>(125,000)</td>
<td></td>
</tr>
<tr>
<td>EY SEN Team</td>
<td>(125,000)</td>
<td>(364,505)</td>
<td>1,722,575</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>2,087,080</strong></td>
<td>(364,505)</td>
<td></td>
</tr>
</tbody>
</table>

15 As agreed at the last forum meeting, £125,000 has been transferred to the Early Years SEN Team. Funding may be required for adjustments to PVI, school and academy payments for census updates for both universal 15 hours and the additional 15 hours entitlement for the October census.
Central School Services Contingency

The following table sets out the expenditure to 30 September 2019:

<table>
<thead>
<tr>
<th></th>
<th>BUDGET £</th>
<th>SPEND £</th>
<th>BALANCE £</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carry Forward from 2018/19</td>
<td>14,272</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unallocated Central Schools</td>
<td>121,983</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Services Block 2019/20</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>VAT Reimbursement CLA</td>
<td></td>
<td>44,771</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>136,255</td>
<td>44,771</td>
<td>181,026</td>
</tr>
</tbody>
</table>

The current unspent balance of this block is £181,026 with no anticipated further spent this financial year.

School Forum approval is required for:

- central early years block provision
- any movement of funding out of the schools block
- any deficit from the previous funding period that reduces the amount of the schools budget
- any brought forward deficit on de-delegated services which is to be met by the overall schools budget

Legal Implications

There are no direct legal implications arising from this report.

Appendices

None

Background Papers

None

Report author(s): Sharon Bellamy
Acting Senior Finance Manager
Sharon.bellamy@centralbedfordshire.gov.uk
13. SEND Workstreams update

To receive an update on the Children's Services Managing Demand in SEND Project - Special School Outreach and Social, Emotional and Mental Health workstreams.
Central Bedfordshire Council

Committee: Schools Forum          Date: 18 November 2019

SEND MANAGING DEMAND IN SEND PROJECTS UPDATE:
- Special School Outreach (SSO)
- Social, Emotional and Mental Health (SEMH) workstreams

Report of: Cllr Sue Clark, Executive Member for Families, Education and Children (Sue.Clark@centralbedfordshire.gov.uk)

Responsible Director(s): Sue Harrison, Director of Children's Services (Sue.Harrison@centralbedfordshire.gov.uk)

This report relates to a decision that is Non-Key – this is an information item

Purpose of this report

The purpose of this report is to provide an update on the Children’s Services Managing Demand in SEND Project – SSO and SEMH Workstreams

RECOMMENDATIONS

1. The Schools Forum is asked to comment on the SSO and SEMH Workstream Updates

Issues

1. Please see Appendix A for the presentation that provides an update on the Special School Outreach Workstream

2. Please see Appendix B for the presentation that provides an update on the Social, Emotional, and Mental Health Workstream

3. The presentation will be delivered by Sue Tyler (Assistant Director, Children’s Services, Business and Supporting Services).

Council Priorities

4. This workstream supports the following Council priorities:
   - Improving education and skills
   - Protecting the vulnerable; improving wellbeing
Legal Implications

5. There are no legal implications directly arising from this progress update.

Financial and Risk Implications

6. There are no financial implications directly arising from this progress update.

Equalities Implications

7. Central Bedfordshire Council has a statutory duty to promote equality of opportunity, eliminate unlawful discrimination, harassment and victimisation and foster good relations in respect of nine protected characteristics; age disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation. Children and young people with SEND can face significantly greater challenges in learning than the majority of their peers or have a disability which hinders their access to the teaching and facilities typically found in mainstream educational settings.

Next Steps

8. Continue to work to towards providing children in Central Bedfordshire access to the right level of support at the right time ensuring every child benefits from an environment that supports speech and language development.

Appendices

Appendix A: Special School Outreach (SSO) Powerpoint

Appendix B: Social, Emotional and Mental Health (SEMH) Workstreams Powerpoint

Report author(s): Louise Bartos

Head of SEND Service

Louise.Bartos@centralbedfordshire.gov.uk
Managing demand in SEND

Special School Outreach Workstream

Schools Forum - November 2019
## Contents

<table>
<thead>
<tr>
<th>Title</th>
<th>Slide number</th>
</tr>
</thead>
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<tr>
<td>Workstream rationale</td>
<td>3</td>
</tr>
<tr>
<td>Workstream reach</td>
<td>4 - 5</td>
</tr>
<tr>
<td>Activity / Output</td>
<td>6 - 7</td>
</tr>
<tr>
<td>Outcomes</td>
<td>8 - 10</td>
</tr>
<tr>
<td>Next steps</td>
<td>11</td>
</tr>
</tbody>
</table>
Workstream rationale

Aim
• To offer an extended range of support by working collaboratively with mainstream schools to build capacity and confidence. The project aims to support schools in meeting the needs of pupils with complex needs *pre-diagnosis* or before the need for an Education, Health and Care Plan.

The workstream has two elements:
• Training for all schools
• Targeted support for individual children

Lifetime of workstream:
• Autumn Term 2018 to end Spring Term 2020
Workstream reach

Central Beds South - The Chiltern

73 schools supported

Central Beds North - Ivel Valley

55 schools supported

97.7% of schools supported
Workstream reach

By year group:

<table>
<thead>
<tr>
<th>R</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
<th>Year 6</th>
<th>Year 7</th>
<th>Year 8</th>
<th>Year 9</th>
<th>Year 10</th>
<th>Year 11</th>
</tr>
</thead>
</table>

By outcome:
- Reduction in children escalating to EHCP
- Reduction in children transferring to special school
- Reduction in total additional cost of specialist provision
- Reduction in fixed term and permanent exclusions
- Reduction in number of out of area placements

By people:
- Work with individual children
- Working with class teachers/assistants/Leadership and Management (SENDCO)
- School training
Activity

2018
- Questionnaire in Autumn term to all schools on training needs
- Planned sessions around questionnaire feedback
- Ran pilot sessions of the training to selected schools to ensure the pitch was relevant and useful to teachers (Evaluation form created)
- Agreed referral process and designed application form again, trailed with schools
- Created publicity flyer to go into Central Essentials to brief schools about the aims of the Early Interventions Team (EIT) and how schools could refer to our service
- Both school websites also gave direct information on the service and how to access support
- Referral process created and caseload opened. Service LIVE and school accessing support for the service from October 2018
- Evaluation form created and completed by some schools
- Case study start to be compiled

Next Steps
- Evaluation to be completed by every school that have accessed service
Output

Early Intervention Strategy

• Intervention at point of concern to support children to be maintained effectively in mainstream, or to reduce SEND need
• Alternative strategies and support options offered (rather than EHCP route)

<table>
<thead>
<tr>
<th></th>
<th>No. of pupils supported</th>
<th>No of schools supported</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The Chiltern</td>
<td>Ivel Valley</td>
</tr>
<tr>
<td>2018-19</td>
<td>41</td>
<td>42</td>
</tr>
<tr>
<td>2019-20</td>
<td>16</td>
<td>13</td>
</tr>
</tbody>
</table>

Support and Training for schools and staff

<table>
<thead>
<tr>
<th>Training</th>
<th>No. delegates attended</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The Chiltern</td>
</tr>
<tr>
<td>Strategies for reducing anxiety</td>
<td>64</td>
</tr>
<tr>
<td>Understanding sensory needs for pupils with SEND</td>
<td>45</td>
</tr>
<tr>
<td>High Quality Teaching for pupils with ASD</td>
<td>41</td>
</tr>
<tr>
<td>Support pupils with SEND in a mainstream classroom</td>
<td>46</td>
</tr>
</tbody>
</table>
Outcome

Training Aim - Promoting whole staff approach to supporting children with SEND, placing the child at the centre

School evaluation of training sessions (up to May 2019):

99.5% of respondents rated
• content,
• delivery, and
• support materials as ‘very good’ or ‘good’

84.5% of respondents definitely, and 15.5% partially, agreed that course content would inform their practice.
Outcome
Training aim continued

A selection of written feedback comments:

“Practical examples we can use right away”
“Reminders of strategies to use in class”
“Time to talk to colleagues”
“Helpful to have 1:1 time with the trainer”
“Could we have a toolkit?”
Outcome

Monitoring and evaluation going forward including:

- Number of children escalating to EHCP
- Number of children transferring to special school
- Total additional cost of specialist provision
- Instances of fixed term and permanent exclusion
- Number of out of area placements
Next steps

• Continue to collate data for training up to April 2020
• Collate information around school evaluation of impact and service
• Completing Toolkit and ensuring available through website and local offer
• Analysis of impact on need for EHCP for target pupils
Managing demand in SEND

SEMH Years 7/8 workstream

November 2019
<table>
<thead>
<tr>
<th>Title</th>
<th>Slide number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workstream rationale</td>
<td>3</td>
</tr>
<tr>
<td>Workstream reach</td>
<td>4 - 5</td>
</tr>
<tr>
<td>Activity</td>
<td>6 - 7</td>
</tr>
<tr>
<td>Outcomes</td>
<td>8 - 11</td>
</tr>
<tr>
<td>Stakeholder evaluation</td>
<td>12</td>
</tr>
<tr>
<td>Case study</td>
<td>13 - 15</td>
</tr>
<tr>
<td>Next steps</td>
<td>16</td>
</tr>
</tbody>
</table>
Workstream rationale

- To increase Jigsaw outreach service to specific pupils in years 7 and 8, identified at risk of exclusion.
- To have a positive impact on the emotional well being and behaviour of staff and pupils in the classroom.

Lifetime of workstream:
- Commenced Autumn Term 2018 through to Summer Term 2019
Workstream reach, in relation to pre-diagnosis referrals and work with individual pupils

- All Saints Academy
- Queensbury Academy
- Manshead Academy
- Potton Middle
- Edward Peake Middle
- Biggleswade Academy
- Henlow Academy
Workstream reach

By year group:

<table>
<thead>
<tr>
<th>R</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
<th>Year 6</th>
<th>Year 7</th>
<th>Year 8</th>
<th>Year 9</th>
<th>Year 10</th>
<th>Year 11</th>
</tr>
</thead>
</table>

By outcome:
- Reduction in children transferring to special school
- Reduction in total additional cost of specialist provision
- Reduction in fixed term and permanent exclusions
- Improved pupil engagement and well-being

By staff:
- Work with individual children and group work undertaken
- Individual family liaison to encourage improved communication
- Class teachers/assistants/Leadership and Management (SENDCO)
- School training, both generic and bespoke.

Progress against targets:
- Training for the Spring Term has gone well
- Schools and families reporting improved pupil well being and engagement
Activity: Support for school staff

- Training delivered to 48 teachers and support staff in 11 Schools
- The aim of the training was to build capacity in school communities and to strengthen the resilience for all children and young people in their care

Topics included:
- Understanding SEMH Needs & Strategies of Support
- Developing an Understanding of Crisis Events in the Classroom - Prevention & Deceleration
- Removing Emotional Barriers to Learning
Activity: Support for children/young people

Referrals were received from each of the targeted schools, totaling 27.

- All pupils were chosen based on exclusion and attendance data as well as school concern in respect of behavior and well-being.
- The interventions were personalized for each pupil and were designed to reflect the needs of the child/young person.
- Schools would be tracking in school attendance and exclusion data to demonstrate impact.
- Case studies available for individual cases – see slide 13
Outcomes

Early Intervention Strategy

• Intervention at point of concern to support children to be maintained effectively in mainstream, or to identify and address additional need in school.

• Alternative strategies and support options offered to address identified need in school.

• Interventions designed to increase the capacity of the schools in order to identify and implement strategies for those children and young people with a SEMH need.

• Effective and robust transition planning between primary and secondary phase.
Outcomes

Support and training for schools and staff:

The training has been most effective when it was part of CPD within the school or cluster of schools, with all staff participating. This is particularly true of sessions that were designed and co-produced specifically to meet the needs of the school.
Outcomes

Promoting whole staff approach to supporting children with SEND, placing the child at the centre

• Training delivered and positively evaluated by all staff attending.

• At every review, a meeting was held between school, parents and Jigsaw team to review progress and discuss next steps. This enabled schools to focus on a ‘Plan, Do, Review’ model that kept the pupil at the centre of interventions.
Outcomes

Reducing risk of exclusion

• Analysis is ongoing, but currently shows positive effect for 68% of pupils
• Supporting schools with strategies or identifying / accessing additional sources of support via other agencies, including Health.
• Working in partnership with other agencies and CBC colleagues to ensure a collaborative approach.
What did you find most helpful?

SENDCO

“The help in rebuilding the relationship between school and home, the strategies for X to help him cope with difficult situations and the support and the understanding of Jigsaw Staff that has resulted in us being able to talk through the various issues and difficulties”

Parent:

“The support has helped me as I don’t feel alone in seeking to understand why x behaves the way he does. Since Jigsaw have begun the interventions I feel the school are really recognising X as having additional needs and are putting more into place to help him”
Case Study

Year 8 Pupil – worked with initially year 7 focusing on transition to year 8
Pupil with recent diagnosis, pupil – initially viewed as chosen behaviours
• Persistent Interruption of the lesson preventing teacher from teaching and students from learning
• Persistent talking
• Rude to staff members
• Argumentative when he feels aggrieved
• Throwing items and escalating behaviours

Key Actions:
• Initiated JSP plan and meetings to facilitate improved home school communication – Pupil had voice at mtgs meaning he was clear on his targets and had a understanding of how the school could assist him to meet his needs.
• Direct work with SENDCO -SENDCO heavily involved from the beginning, recognising that the behaviours indicated unmet need.
• Whole school training - Communicate needs to whole staff –One page profile that outlines key needs and matches with support strategies – shared with key staff
• 1:1 work to support pupil with recognising need and providing strategies -12 weeks support - Working on Expressive language, unpicking diagnosis, dealing with anxiety, self awareness and pupil voice fed to staff

Results:
Pupil behaviour was scored as just 3/10 at referral – mid point 7/10 – and is now reported as 8/10 – that’s an overall positive increase of 167%

Next steps for pupil:
- Small social group for pupil focusing problem solving in social situations
From this... to this

March 2019

September 2019
Next steps…

- Link with other key alternative provision partners including Special Schools and the ACB to share the learning.
- Planning in progress to compile a CBC SEMH Toolkit and ensure availability through CBC website and Local Offer.
- The aim is to make the process of supporting vulnerable pupils more transparent, with the addition of templates and reference to support resources.
14. Work Programme

To consider the work programme for the Central Bedfordshire Schools Forum.
Purpose of this report

The purpose of this report is to assist the Schools Forum in discharging its responsibilities by providing a proposed work programme for consideration.

RECOMMENDATION

That the Panel considers the proposed work programme attached at Appendix A.

Background

1. To assist the Schools Forum Panel a work programme is attached at Appendix A to this report. The work programme contains the known agenda items that the Forum will need to consider.

2. Additional items will be identified as the municipal year progresses. The work programme is therefore subject to change.

Council Priorities

3. The activities of the Schools Forum are crucial to ensuring that the Council effectively discharges its duty to maintain rigorous and transparency through the work of the Forum of the Schools Budgets. By considering, approving and following its work programme, the Forum helps support the Council’s priorities as set out in the Council’s Five-Year Plan:

http://www.centralbedfordshire.gov.uk/council/five-year/plan.aspx
Corporate Implications

4. There are no corporate implications.

Legal Implications

5. There are no legal implications.

Financial and Risk Implications

6. There are no financial and risk implications.

Equalities Implications

7. Central Bedfordshire Council has a statutory duty to promote equality of opportunity, eliminate unlawful discrimination, harassment and victimisation and foster good relations in respect of nine protected characteristics; age disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.

8. Report authors will be encouraged to work with the Corporate Policy Advisor (Equality & Diversity) in order to ensure that relevant equality implications are identified.

Conclusion and next Steps

9. This report will assist the Schools Forum Panel in discharging its responsibilities. Any amendments approved by the Forum will be incorporated in the work programme.

Appendices

10. The following Appendix is attached:

Appendix A – Schools Forum Work Programme

Background Papers

11. None

Report author(s): Sharon Griffin
Committee Services Officer
Sharon.griffin@centralbedfordshire.gov.uk
### Schools Forum Panel Work Programme

#### 19/20 Municipal Year

<table>
<thead>
<tr>
<th>2020</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>13 January</td>
<td></td>
</tr>
<tr>
<td>8 June</td>
<td></td>
</tr>
<tr>
<td>14 September</td>
<td></td>
</tr>
<tr>
<td>9 November</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>Topics</th>
</tr>
</thead>
<tbody>
<tr>
<td>13 January</td>
<td>- Facilities Time Management</td>
</tr>
<tr>
<td></td>
<td>- Early Years and High Needs Block</td>
</tr>
<tr>
<td></td>
<td>- Schools Forum budget update</td>
</tr>
<tr>
<td></td>
<td>- Dedicated Schools Grant</td>
</tr>
<tr>
<td></td>
<td>- Dedicated Schools Grant Contingency Budgets</td>
</tr>
<tr>
<td></td>
<td>- School Finance update</td>
</tr>
<tr>
<td>9 March</td>
<td></td>
</tr>
<tr>
<td>8 June</td>
<td></td>
</tr>
<tr>
<td>14 September</td>
<td></td>
</tr>
<tr>
<td>9 November</td>
<td></td>
</tr>
</tbody>
</table>

**Unscheduled reports:**
- Review of the pilot year of the Growth Fund payment arrangements
- Update on the review of Academy Budgets
15. Date of the Next Meeting

Monday 13 January 2020