



# Minutes

# BARNSLEY SCHOOLS FORUM

**MINUTES OF THE SPECIAL MEETING OF THE FORUM HELD ON TUESDAY,  
19<sup>th</sup> DECEMBER 2017, AT KIRK BALK ACADEMY**

**PRESENT**

**Headteacher Representatives**

Nick Bowen (Chair of the Forum) Dean Buckley Antoinette Drinkhill, Josh Greaves (substitute for Dave Whitaker) and Alison Wilks

**Governor Representatives**

Mark Pawson and Michael Sanderson

**Special Schools Representative(s)**

Molly Beever and Josh Greaves (substitute for Dave Whitaker)

**Early Years Provision Representative**

Claire Gilmour

**14-19 Years Provision Representative**

Dave Benbow

**Other Representative(s)**

Nicola Fitzpatrick

**Also Attending**

Fiona James (Observer)

**Officers**

Margaret Libreri

Service Director (Education, Early Start and Prevention) People Directorate, Barnsley MBC

Josh Amahwe

Strategic Finance Manager (Core Services Directorate) Barnsley MBC

## **1. APOLOGIES FOR ABSENCE**

Formal apologies for absence had been received from Mr England, Mr Thomas, Councillor Millner and Councillor Mitchell.

## **2. DECLARATIONS OF PERSONAL AND PECUNIARY INTEREST**

Representatives of the Forum, declared an interest in the set of items under Agenda Item 3 concerning School Budgets.

## **3. SCHOOLS BUDGET**

### **3 (a): Outcome Of The Recent Consultation With Schools On Proposed Changes To The Schools Funding Formula**

Mr Bowen welcomed members of the Forum to today's special meeting whose purpose was to consider this matter.

Mr Amahwe presented an analysis of the responses made by local schools and academies to the recent consultation on proposed changes to the Borough's Schools Funding Formula and baseline. Mr Amahwe commented on the number and nature of responses received to the following questions:

#### **Chapter 1: Establishing Funding Baselines For Schools' Allocations**

*Question 1: Do you support the Council's proposal to cease its £1 million contribution to the schools' budget and for the impact to be managed within the context of the increased funding from the National Funding Formula (NFF)?*

*Question 2: Do you agree with the proposal to adjust the pupil led factors, including deprivation and low prior attainment, to manage the impact of the withdrawal of the £1 million funding? If not, can you suggest any alternative fair or equitable redistribution option(s)?*

*Question 3: Do you support the proposal to protect underfunded schools, through the Minimum Funding Guarantee, from the impact of the adjustment?*

#### **Chapter 2: Proposed Changes To The Local Funding Formula**

*Question 4: Do you agree with the proposed principles that would inform the proposed changes to the formula?*

*Question 5: Do you agree with the funding factors currently used in the local formula? If not, can you suggest other allowable factor(s) with an explanation for its inclusion in the local formula?*

*Question 6: Do you support our proposal to set the primary to secondary ratio at 1:1:30, which although consistent with, is higher than the NFF of 1:1:29?*

*Question 7: Do you support our proposal to align the AWPU rates closer to the NFF for secondary schools over the transition period, whilst protecting the primary phase by maintaining the current level?*

*Question 8: Do you support our proposal to include the new minimum per pupil funding factor and for this to be set at the transitional level of £4,600 for secondary and £3,300 for primary schools during 2018/19?*

*Question 9: Do you support the weightings proposed for each of the additional needs factors as outlined above i.e deprivation, low prior attainment and English as an additional language?*

*Question 10: Do you support the proposal to maintain the lump sum factor at the current level i.e £100,000 per school (irrespective of school phase)?*

*Question 11: Do you agree with the current approach for addressing planned pupil growth outside of the local formula (with the set aside Growth Fund agreed and managed annually by the Schools Forum)*

*Question 12: Do you support our proposal to reflect the Government's expectation of the minimum 0.5% per pupil cash increase for each school within the formula?*

*Question 13: If so, do you support the proposal to set the Minimum Funding Guarantee at 0.5% which would ensure all schools would see an increase in their funding compared to the adjusted baseline?*

*Question 14: Do you support in principle the Council's proposal to transfer funding from the Schools Block to the High Needs Budget to contribute towards addressing the budget pressures arising from increasing SEN placements?*

*Question 15: Do you support the proposal to transfer 1.5% of the schools block funding in 2018/19 in recognition of the scale of the pressures facing the High Needs Block?*

Representatives of the Forum, including those who had responded to the consultation on behalf of their school or academy, commented further and discussion arose on the financial impact of the proposals in specific schools or phases of schools. Whilst noting these comments, Mr Amahwe went on to present the Local Authority's response to the outcome of the consultation, as follows:

#### Primary School/Secondary School Ratio

Whilst the assumed NFF ratio is 1:1:29 it is recognised by the Government that at individual local authority level, the ratio produced may vary, reflecting their local circumstances and the type of schools within the area. In view of the responses to the consultation made from the Primary Phase, consideration may need to be given to phasing the move to the NFF Ratio over the intervening transition period whilst still ensuring that underfunded secondary schools obtain the funding increases expected under the NFF. This would accord with the key objective of securing a closer alignment to the NFF whilst still ensuring stability in the funding system.

#### Basic Entitlement Factor (AWPU)

The Authority considers that the majority of funding should be distributed on the basis of pupil numbers and characteristics (of which AWPU is the main factor). In carefully considering the concerns raised in responses to the consultation, Barnsley MBC would look to:

- Address historic, low AWPU rates for secondary schools by aligning to the NFF rates but to do this over the 2 year transition period (and within the funding constraints)
- To help ensure some stability for primary schools, Barnsley MBC would consider maintaining AWPU at current levels (instead of reducing it to the NFF rate)
- Barnsley MBC will also introduce the minimum per-pupil level of funding for primary and secondary schools to increase stability and ensure schools are funded to the minimum recommended level.

#### Minimum Per-Pupil Funding

To ensure closer alignment to the NFF in Barnsley and enable underfunded schools to be resourced at an appropriate level, the Local Authority would look to introduce a minimum per-pupil level of funding for primary and secondary schools. This would help ensure stability and recognise pupils' additional needs which may not be picked up through 'proxy' factors in the formula. The minimum amount for 2018/19 would be established in line with the NFF (*DfE recommended rates*) having taken into account the available resources. The intention will be to further increase the minimum level in 2019/20 in line with the NFF and this should provide some additional funding for those primary and secondary schools that are currently at or are slightly above the 2018/19 minimum level.

#### Additional Education Needs (AEN) Factors

The consultation reflects that the majority of schools in the Borough are opposed to the proposed weightings for different reasons. Nonetheless, supporting disadvantaged pupils is still a key central government policy. Therefore, to help address this concern, Barnsley MBC intends to reduce the proportion of funding for deprivation to the NFF level (whilst meeting the key objective of closer alignment). The intention is to maintain other AEN factors to NFF levels, rather than increase the funding proportions to NFF levels. Any increase in other AEN factors to NFF levels cannot be justified, given the funding envelope and the small number of pupils (in proportion to the total pupil population) that meets the criteria.

#### Lump Sum

There is strong support (across school phases) for the lump sum of £100,000 to be increased by £10,000 to the NFF level, together with the suggestion that this be implemented via a phased approach. In response, the Local Authority would consider this only if it does not have a significant adverse impact on the pupil led funding percentage in which the Local Authority is required to allocate at least 80% of its funding through these pupil-led factors.

#### Minimum Funding Guarantee (MFG)

In listening carefully to the concerns emerging through the consultation on the MFG, Barnsley MBC will be setting an initial MFG at 0.5% with the final percentage to be dependent on the proposed transfer of funding to the High Needs Block.

## RESOLVED

- 1 That the Barnsley Schools Forum notes the outcomes of the recent consultation on proposed changes to the Schools Funding Block, together with Barnsley MBC's response and the next steps, concerning Primary/Secondary School Ratios; Basic Entitlement (AWPU), Minimum Per-Pupil Funding; AEN Factors; Lump Sum and MFG.**

### 3 (b): Proposal To Transfer Funding From The Schools Block To The High Needs Funding Block

Mr Amahwe presented a second report which concentrated on the specific proposal raised in Questions 14 and 15 of the consultation. In recognition of the significant and prevailing cost pressures faced in the High Needs Block as a result of the increasing demand for providing school placements for pupils with special educational needs, together with the rising costs of being compelled to provide many placements in settings outside of the Borough, Barnsley MBC proposed the transfer of 1.5% (or £2.1 million) of Schools Block Funding to the High Needs Budget.

The proposal would be subject to the agreement of the Forum and the subsequent approval of the DfE. Mr Amahwe clarified that in proposing the transfer, Barnsley MBC had been mindful of the impact such a transfer would have on school budgets and their ability to meet a rising number of financial commitments, as articulated in many of the responses to the proposal, within the recent consultation.

Mr Amahwe added that this impact would be managed and mitigated through the following measures:

- The increased funding for local schools anticipated through the new NFF, during 2018/19 and 2019/20 would provide scope to cushion any impact from the proposed transfer.
- During this period, the proposed transfer would be managed by adjusting the funding proportions and unit values of the AWPU, Deprivation and Prior Attainment funding factors.
- The minimum per pupil funding for secondary schools would be adjusted downwards by £60 per pupil (to £4,540). This would also provide some protection to the primary phase.
- The cumulative effect of these adjustments would reset the primary to secondary funding ratio in Barnsley, to 1:1:29, which would be consistent with the NFF.

In noting these mitigations, some members of the Forum expressed disenchantment with the proposed transfer, based upon the view that the prevailing overspend in the High Needs Block and, in particular, upon SEN school placements, had been due to an inability by the Local Authority to obtain a grip of the situation. In response, both Ms Libreri and Mr Lynch provided the Forum with further insight into the local and national context, leading to the cost pressures facing SEN school placements and the formulation of the Borough's SEN School Placements Sufficiency Strategy and Commissioning Plan.

Ms Libreri and Mr Lynch encouraged the Forum to support the proposal as it would help fulfil the overriding objective of the new Strategy, namely to reset the

balance in favour of growing capacity within local, including mainstream provision in order to better meet pupil needs and develop a more sustainable system.

The Forum noted that delivery of the proposed actions within the draft SEN School Placement Sufficiency Strategy are contingent on investment to create additional capacity within local mainstream and special schools. Any decision by the Forum to restrict the proposed transfer will likely impact on our ability as a system to invest and will exacerbate the overspend position in the High Needs Block.

Mr Bowen then requested a vote on the proposal, as follows:

Motion 1: The Schools Forum Approves The Proposal To Transfer 1.5% Of Schools Block Funding To The High Needs Block

Eligible members voting in favour = 3

Eligible members voting against = 5

(Motion defeated)

Motion 2: The Schools Forum Approves A Transfer Of 1.0% Of Schools Block Funding To The High Needs Block

Eligible members voting in favour = 8

Eligible members voting against = 0

(Motion carried)

**RESOLVED**

- 2 (a) The Barnsley Schools Forum recommends the transfer of 1.0% and not 1.5% of Schools Block Funding to the High Needs Block in order to help tackle the prevailing financial deficit in the latter.**
- 2 (b) The Forum's decision be noted in Mr Amahwe's forthcoming report to the Council's Cabinet, on the outcomes of the recent consultation on proposed changes to the funding formula, together with the next steps.**

3 (c): Central Schools Services DSG Budgets (2018/19)

Mr Amahwe outlined the proposed Central Schools' Services Block Budgets for 2018/19. The proposed allocations had been based upon a thorough analysis of historic commitments and ongoing responsibilities which were reviewed by the Forum, at today's meeting.

**RESOLVED**

- 3 (a) The Barnsley Schools Forum agrees to the proposed allocation of DSG funding for both statutory and retained functions of the Local Authority, during 2018/19 as follows:**
- **School admissions - £275k**
  - **School Forum administrative costs - £7k**
  - **Termination/pension costs - £75k**
  - **Asset management - £251k**
  - **Education welfare - £208k**
  - **Other statutory and regulatory functions - £41k**

- **Looked after children - £200k**
- **14-19 years skills and employment - £85k**
- **Schools intervention fund - £450k**

**3 (b) The Forum notes the balance of funding of £88k to be held on account in order to cover the cost of increases in copyright licenses and pressures in other DSG funding blocks.**

4: Any Other Urgent Business

No issues were raised. Mr Bowen thanked members of the Forum for their attendance and contribution and expressed his appreciation to the staff at Kirk Balk Academy for their hospitality in hosting today's meeting.

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Signed by the Chair of the Barnsley Schools Forum