

Schools Forum Meeting Agenda

Thursday, 28 November 2019 at 9.00 am
to be held in 4th Floor South, Tor Hill House

Membership

Stewart Biddles (*Chair & Primary Academy Head*)
Ken Kies (*Primary Academy Head*)
Maurice Codd (*Primary Maintained Governor*)
Adam Morris (*Primary Maintained Head*)
Lindsey Kings (*Secondary Academy Deputy Head*)
Sally Timmins (*Secondary Academy Governor*)
Jayne Jones (*Early Years*)
Dan Hallam (*Post 16*)

Lisa Finn (*Vice-Chair & Secondary Academy Rep*)
Tim Stephens (*Primary Academy Governor*)
Jim Piper (*Primary Academy Deputy Head*)
Daneian Rees (*Secondary Academy Rep*)
Clive Star (*Secondary Academy Governor*)
Mike Lock (*Special Schools Head*)
Steven Hulme (*PRU Head*)

1. **Apologies/Changes to Membership**
2. **Minutes of the last meeting** (Pages 3 - 8)
3. **Matters arising**
4. **Standing Items**
5. **Financial Report** (Pages 9 - 12)
6. **Funding Allocations for 2020/21** (Pages 13 - 21)
7. **De-Delegation and Centrally Retained Items** (Pages 22 - 24)
8. **Value for money - Post 16 report**
Report to follow
9. **Items for next meeting**
 - Financial Report
 - Meeting Dates for 2020/21
10. **Future meeting dates**
 - Thursday 23rd January 2020, 09:00, 4th Floor South, Tor Hill House
 - Thursday 12th March 2020, 09:00, Mezzanine Room 4, Tor Hill House

For information relating to this meeting or to request a copy in another format or language please contact:

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Minutes of the Schools Forum

31 October 2019, 09:00

Mezzanine Room 4, Tor Hill House

-: Present :-

Stewart Biddles (Chairman), Primary Academy Head; **Lisa Finn (Vice-Chair)**, Secondary Academy Rep; **Maurice Codd**, Primary Maintained Governor; **Adam Morris**, Primary Maintained Head; **Ken Kies**, Primary Academy Head; **Lindsey Kings**, Secondary Academy Deputy Head; **Daneian Rees**, Secondary Academy Rep; **Clive Star**, Secondary Academy Governor; **Jim Piper**, Primary Academy Deputy Head; and **Jayne Jones**, Early Years Rep

Also in attendance: **Rachael Williams**, Assistant Director for Education, Learning and Skills; **Martin Phillips**, Head of Finance; **Sean Cremer**, Deputy Head of Finance; **Rob Parr**, Principal Accountant; **Dorothy Hadleigh**, Head of SEN; **Michael Freeman**, Clerk

1. Apologies/Changes to Membership

The Forum welcomed Ken Kies to the meeting in his role as Primary Academy Representative. Apologies were received from Dan Hallam, Tim Stephens and Mike Lock.

2. Minutes of the last meeting

The minutes of the last meeting held on 27th June 2019 were agreed as a true record.

3. Matters arising

None.

4. Financial Report

Rachael Williams, Assistant Director of Education, Learning & Skills, presented a breakdown of the current financial position. The outturn position for 2019/20 continues to forecast an overspend of £955k in this year. The pressures on each block was then discussed individually.

There is no anticipated overspend in the Early Years block at present, however members were asked to note that census returns drive any expenditure in this

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block, and therefore this position is likely to change once further information is available to officers later in the year.

The most pressure continues to be on the Higher Needs Block, however it is important to note that pressure has not increased on this block since the last Forum in June.

There continues to be a rise in allocated funding above £6k, although underspend has increased from £121k in June to £175k currently.

Demand on Special Schools remain an area of concern, as the number of children from out of area requiring this provision is growing. However it was noted that these placements are for children presenting with very complex needs that are not suitable for mainstream places, so this provision is required.

Members note the content of this report, and whilst pleasing that the current financial situation is more stable than it was previously, projected outturn remains a concern.

The Forum discussed the number of children moving into Torbay, and wondered how this data compares with our statistical neighbours. It was recognised that there is no comparative movement data at present. Therefore, members asked officers to do some collaborative work with Plymouth colleagues, to compare the profile of children moving in to the respective authorities.

Action – Officers to contact Plymouth colleagues and compare data.

5. Analysis of High Cost Placements

Dorothy Hadleigh, Head Special Educational Needs and Disabilities, presented her paper on High Cost Placements and the ongoing work of the SEND team.

Whilst the number of RSAs (Requests for Statutory Assessments) continue to rise, it was noted that the number being agreed remains relatively stable. This higher level of refusals (29%) is due in part to a greater level of scrutiny at the requests panels.

There continues to be great demand on our locally commissioned provisions, including the new provisions at Spires and Steps (Paignton). However, despite this pressure the SEND team are beginning to move some out of area children back into Torbay. Although there has been some challenge to this, and we have seen an increase in tribunals, Dorothy was pleased to inform that the decisions her team are taking are being acknowledged by tribunals, and two recent tribunals have both been awarded in favour of the LA.

Independent placements continue to be a pressure. There has been some reduction in spend, but pressure mainly exists when Social Care move children out of area and SEND are having to paying the education elements.

Dorothy thanked colleagues at South Devon College, as the packages now being offered there have led to a reduction in the use of bespoke placements.

SEN Caseworkers are now rigorously challenging schools on Bespoke Packages, asking for greater evidence as to why these children are in need of these. Existing packages are now monitored on a 6 weekly basis, and two monitoring officers are now in place to do this. This has led to a reduction in the number of packages.

Dorothy and her team has been working closely with Post 16 providers looking at value for money. A pilot scheme at South Devon College has created provision for children that previously would have required more expensive out of area placements. This has been extremely successful so far, but will be reviewed after one year.

Extensive work is ongoing around Joint Funded Placements, with the aim of bringing more children back into Torbay and reducing the costs of placements. The SEN team are negotiating costs with current providers.

Forum members were pleased to note the impact that the measures being implemented by Dorothy and her team were having, and thanked her and her team for their hard work.

6. Clarifying the Specific Grant and Ring-fenced Status of the DSG Consultation

Members were presented with a paper from the DfE, Clarifying the Specific Grant and Ring-fenced status of the Dedicated Schools Grant. The paper underlines the fact that the Schools Block of the DSG is the responsibility of Schools Forum alone, and it would not be reasonable to ask the LA to use reserves held to bail out the Schools Block, without prior approval from the Secretary of State.

The proposals were discussed by members, and it was felt that although they agreed with the proposals in principle, it was felt that it was unrealistic given the current situation. After some clarification, Members were in agreement for the LA to respond to the DfE on behalf of the Forum.

Rachael made it clear to members that the LA will be responding in favour of the changes proposed, whilst reminding them that schools can respond on an individual basis as well.

7. 2020/21 Allocations

Please note that the first part of this item was not included on the original agenda, given that it was only received by the LA on 30th October.

Martin Phillips, Chief Accountant, shared a letter received from the Education and Skills Funding Agency (included with these minutes). The ESFA feels that the current recovery plan lacks a long term strategic focus, and that more needs to be done by the LA to ascertain why Torbay has the highest number of children with

Education, Health and Care Plans in the country. The letter goes on to state that given additional funding in the Higher Needs block (discussed in item 8 of the agenda), it would be expected that the LA would not need to transfer money from the Schools Block into the Higher Needs Block in future. The EFSA would like to arrange a visit to discuss the recovery plan.

Members were in agreement that a meeting with the EFSA would be beneficial, to ascertain how they expect the LA to make the recommended changes to the current recovery plan. Rachael was keen to have representatives from both Schools Forum and the Higher Needs Recovery Group, members should contact Rachael directly if interested in attending.

Action – Members to contact Rachael if interested in meeting with the EFSA, once a date has been agreed.

The Forum discussed the allocations for 2020/21. Martin explained that the likely budget pressure next year will be around £2.5m. A decision on whether Schools Forum would support any decision to vire money to deal with this was then discussed.

Members expressed ongoing concerns about the current National Funding Formula, with schools in the most deprived areas having the least amount of growth. It was explained by Rachael that new guidance now states that any allocations not meeting the Minimum Pupil Guarantees would require a separate disapplication to the Secretary of State, and that growth into those schools that were far away from the NFF is driving the allocation of growth funds.

A decision on whether Schools Forum was still in favour on maintaining a move towards the Minimum Funding Guarantee was put to the vote:

In favour: 5

Not in favour: 4

Abstain: 1

Motion carried. Given this, how Forum works towards the MFG was then debated. Officers have produced 4 models for the allocation of growth moving forward, with the aim of meeting Minimum Pupil Guarantees.

Prior to the meeting Mike Lock, Special Schools rep, contacted the Chair with apologies but shared his views noting that there has been very limited growth in Special Schools, a position that was not challenged previously given the position we were in. Some parity between mainstream and special schools growth was asked for.

Members asked whether approval for a 0.5% disapplication would automatically be granted with or without Schools Forum approval. Rachael clarified that if Forum did not approve this, the LA would then have to apply to the Secretary of State.

Rachael felt it was important to show that the Forum is doing what is permissible in the local area but there is still a deficit, and we would welcome further discussion on

the ongoing budget pressures with the EFSA. Members agree that it was needed to demonstrate the work being done collectively.

The Chair asked members to vote on whether or not they support a virement of 0.5% (Approx. £400k):

For: 7
Against: 3
Abstain: 0

Virement supported. A decision on whether to support a further disapplication of 1.79% was then put to vote:

For: 0
Against: 10
Abstain: 0

Unanimous, Forum does not support further disapplication. Given this decision, the LA now needs to discuss with the Chief Executive if we go ahead with Disapplication without the approval of Schools Forum. If this were to happen, the models discussed in this meeting would need to be sent out to schools for further consultation. This consultation would happen immediately and run until the 25th November, as any application would need to be submitted by the 28th November. Members requested that models of the 0.5% virement be presented for the next meeting.

Special Schools tables, as requested at the last Forum, was shared with members. In his absence, it was recognised that Mike would want parity with what is agreed with other schools, but it was felt that it would not be right to reach a decision on this without his input. With this in mind, and given that further information would be available once the 0.5% virement has been modelled, it was decided to defer this item until the next Forum.

Action – Officers to Model 0.5% tables for Forum for Novembers meeting.

8. Any Other Business

Jane Jones (Early Years Rep) read out a letter received from Kevin Foster MP, on behalf of a parent of a child at Puffins Nursery. The letter expressed concerns around a perceived lack of funding for children in their Torbay branch when compared to their nurseries in Devon, and asked for clarification on this.

Rachael read out a technical response to the enquiry, prepared on behalf of forum members:

On the 1st December 2016 the DfE published its response to the consultation for the implementation of the new Early Years Funding Formula. The transition to the new way of funding Early Years children began in April 2017. Torbay Council run an Early Years funding consultation to which a full response was provided. The

previous hourly rate of £4.08 per hour was heavily subsidised through our DSG funds, something which was not sustainable on a longer term basis. The new formula ensures the hourly rates are self-sufficient and no longer require the heavy subsidisation from the DSG. Torbay provided a transitional budget for one year to reduce the rate in two steps, from £4.08 to £4.00, and then down to £3.82 from April 2018. The hourly rate that we provide as funding is calculated as an overall 5% that is kept by the LA within our statutory gift to run the Early Years service, minus our SEND and Deprivation budget. We provide £3.82 for three and four year olds, and £4.95 for two year olds, and our children are also in receipt of the Pupil Premium. We also pay deprivation at £200 per eligible child, and an SEND budget that is scaled up to £9.00 per hour based on a threshold criteria that is given to settings that apply for it. We additionally provide £615 per year for children with disability access fund issues. The LA took the decision to adjust the hourly rates of our budgets year on year, and since the introduction of the new funding formula Torbay has not received an increase in funding rate, therefore we have not increased the rate given to children. We are waiting the DSG budget allocations, and we will consult on the impact of any new funding through Schools Forum when appropriate.

The 5% retained budget is the amount that local authorities are permitted to retain and is used for core functions. Devon County Council currently pay £4.02 per hour, which is only supplemented by £0.02 per hour for universal deprivation, and £0.04 per hour as a universal SEND grant. Devon also pay targeted deprivation at only £0.08 per hour for eligible children. Devon has taken the decision to cut down on targeted interventions and increase their hourly rate, therefore their universal base rate is higher than Torbay's. It is important to note that the money isn't being retained by the LA, but Schools Forum has elected to give the money to our disadvantaged children and not apply it through the universal base rate.

Members thanked Rachael for the response and agreed that this be sent to Kevin Foster on behalf of the Forum.

9. Items for next meeting

- Special School Allocations (deferred from this meeting).
- 0.5% virement models.
- Centrally Retained items.
- De-Delegation of Services.

10. Future meeting dates

- Thursday 28th November 2019, 09:00, 4th Floor South, Tor Hill House
- Thursday 23rd January 2020, 09:00, 4th Floor South, Tor Hill House
- Thursday 12th March 2020, 09:00, Mezzanine Room 4, Tor Hill House

School Forum 28th November 2019
Financial Report

Introduction

The following report contains a detailed breakdown of the financial position of the Local Area for 2019/2020. The report enables members to note the outturn position and the significant factors contributing towards the spend. The report covers the following items

- Forecast Outturn position 2019/2020
- Contextual information regarding Early Years Block
- Contextual information regarding Higher Needs Block
- Position and recommendations

Final Outturn position 2019/2020

Dedicated Schools Grant (DSG) funded activities **overspent by £1.048m**

The following table details the main areas of both over and under spend. Many of these budgets are demand led and will be monitored during 2019/2020 and revisions reported accordingly.

Budget Heading	Budget	Actuals to date	Projected Outturn	Over / (Under) Spend
Early Years 2, 3 & 4 yr old payments – PVI's	£4.653m	£2.588m	£4.653m	£0k
Early Years - ALFEY	£250k	£173k	£270k	£20k
Early Years – Pupil Premium & Disability Access Fund	£130k	£38k	£105k	(£25k)
Early Years – 5% retained element	£372k	£186k	£372k	£0k
Joint Funded Placements	£500k	£354k	£630k	£130k
Recovery of funding from schools for Excluded Pupils, Medical Tuition Service and Elective Home Education	(£704k)	(£198k)	(£470k)	£234k
Independent Special School Fees	£2.620m	£1.335m	£2.445m	(£175k)
Other packages for EHCP pupils and SEND personal budgets	£718k	£593k	£1.035m	£317k
Payments to / recoupment from other authorities for Special School places	(£129k)	(£4k)	(£260k)	(£131k)
Medical Tuition Service / Virtual School / Hospital Tuition / Vulnerable Students Team	£1.267m	£723k	£1.267m	£0k
School contingencies (Rates, planned pupil growth, NQT induction etc)	£532k	£295k	£352k	(£180k)
EHCP in-year adjustments (see separate paper for details)	£500k	£242k	£318k	(£182k)
Special Schools / High Needs in-year adjustments (see separate paper for details)	£484k	£673k	£784k	£300k
School Intervention / Commissioning (includes School Improvement Grant)	£177k	£80k	£177k	£0
Business Support	£163k	£101k	£153k	(£10k)
Required contribution from reserves in 19/20 to set a balanced budget	(£750k)	£0	£0	£750k

It should be noted that the out-turn position has increased by £93k from the previous Forum. The area of significant volatility is the Higher Needs Block due to the demand led pressures.

Early Years Block

The position of the Early Years Block remains unchanged from the previous Forum papers. At this time officers are not making projected end figures as the census information will need to be gathered.

Higher Needs Overview

Torbay continues to have a greater number of children and young people requiring additional support up to and including a special school place than the funds available in the Higher Needs Block can meet. This demand pressure is in the great majority driven by schools/parents requests for additional support and/or that children are assessed for an education, health and care plan (EHCP)

The work of the Higher Needs Recovery group continues to focus on a diagnostic approach to identifying high cost areas and potential mechanisms for change. The actions included in the Recovery Plan are being addressed, implemented and there is some evidence that this is starting to stem the budget position.

In addition to placement costs we continue to monitor the requests for additional funds above the £6,000 allocated to schools. The following tables indicates the position to date.

Education, Health & Care Plan Funding for 18/19 & 19/20			
	18/19	19/20	Increase / (Decrease)
Number of pupils with EHCP	395	444	49.00
Number of FTE's with EHCP	359	401	42.00
	£	£	£
Funding below £6k allocated through school formula elements	2,129,835	2,383,233	253,398
Funding above £6k allocated as a top-up per eligible pupil	1,507,657	1,929,955	422,298
EHCP Contingency	330,000	500,000	170,000
In-Year adjustments			
April	175,869	89,037	(86,832)
May	18,302	(2,510)	(20,812)
June	25,258	21,302	(3,956)
July	34,064	12,688	(21,376)
August	47,954	4,248	(43,706)
September	69,403	84,471	15,068
October	39,935	32,871	(7,064)
November	43,236	43,236	0
December	6,064	6,064	0
January	11,698	11,698	0
February	14,216	14,216	0
March	201	201	0
Total - In-Year adjustments	486,200	317,522	
Projected (underspend) / overspend	156,200	(182,478)	
Notes			
Based on Apr 19 to Oct 19 in-yr adjustments, and the same allocation for the remainder of the financial year as 18/19, it is anticipated the EHCP contingency will underspend by			£182,478

This position has improved since the previous Forum paper by £7k. The special school numbers continue to be reviewed and tracked. The following table demonstrates the position.

Position

The projected out-turn of the Local Area continues to be of significant concern. The position remains volatile and continued actions need to be taken to try and mitigate spend.

The Department for Education issued a letter to the Local Authority and have made a request to support us in developing our DSG deficit recovery plan. A representative from the DfE SEND department and an ESFA local authority funding colleague will attend. The department expect to meet with Local Authority officers and we have request that the meeting is expanded to include a representation group for Schools Forum. The department have suggested the following dates:

22nd – 24th January 2020 or 10th – 14th February 2020

Recommendations

It is requested that Schools Forum:

1. Note the financial position and continue to work with the Local Authority through the mechanism of the Higher Needs Recovery Group to enact the financial recovery plan.
2. Elect a representational group of Forum members to meet with the DfE/EFSA.

Rachael Williams

Assistant Director Education, Learning and Skills

School Forum 28th November 2019
Modelling of Allocations for 2020/2021

Context

The Local Area is now in receipt of the guidance and funding allocation for 2020/2021. The Local Area will benefit from the following uplift in funding:

Schools Block	Additional	£3.9 m	5% increase
High Needs Block	Additional	£1.5m	8% increase
Central Schools Block	Reduction	-£105k	20% reduction in the historic commitments element
Early Years Block	Additional	£129K	Made up of £17k for 2 year olds and £112K for 3 and 4 year olds

In the School Forum meeting on the 30th October 2019 the Forum took the decision to agree to a virement of funds from the Schools Block to the Higher Needs Block up to the permitted 0.5% cap.

The School Forum did not support an application to dis-apply the regulation to move additional funds and following the meeting, the Local Authority confirmed that they would not be making an application.

In line with these decisions officers have now modelled the allocation of these funds. In conducting this work officers have used the principles agreed by School Forum with the ambition of getting to the minimum pupil guarantees. For this reason we continue to use the statutory guidance on minimal pupil amounts for both primary and secondary phases.

Mainstream modelling – Explanation of models

No virement of funds (provided as a baseline comparator)	Assumes a minimum Funding Guarantee of 1.84% per pupil and a minimum per pupil amount of £3,750 for primary and £5,000 for secondary. All other unit values as per National Funding Formula.
Virement of funds Option 1	Assumes a Minimum Funding Guarantee of 1.84% per pupil and a Minimum per pupil amount of £3,750 for Primary and £5,000 for Secondary. AWPU remains at NFF values, all other unit values have a 2.70% reduction from NFF levels
Virement of funds Option 2	Assumes a Minimum Funding Guarantee of 1.84% per pupil and a Minimum per pupil amount of £3,750 for Primary and £5,000 for Secondary. All unit values have a 0.75% reduction from NFF values, apart from the lump sum which has a 0.20% reduction.
Virement of funds Option 3	Assumes a Minimum Funding Guarantee of 0.8% per pupil and a Minimum per pupil amount of £3,750 for Primary and £5,000 for Secondary. AWPU remains at NFF values, as does lump sum, all other unit values have had a 3.10% reduction from NFF levels.

Special School modelling – Explanation of models

Option A	2% increase from 2019/20, 13.31% of £1.5 m growth
Option B	4% increase from 2019/20, 26.63% of £1.5m growth
Option C	5% increase from 2019/20, 33.28% of £1.5m growth
Option D	8.78% increase from 2019/20, 58.42 of £1.5m growth
Option E	7.51% increase from 2019/20, 50.00% of £1.5m growth
Option F	9.39% increase from 2019/20, 62.50% of £1.5m growth

Early Years Budget Allocation

The Early Years budget allocation is subject to a full consultation with all providers in the sector. The budget consultation document will include varying models of hourly rates.

The School Forum have historically supplemented the SEND funding for Early Years (ALFEY) from the Higher Needs budget. In 2019/2020 this equated to £100k.

School Forum may select to remove this supplement from the Higher Needs budget and place the duties within the Early Years budget. This decision needs to be considered and taken by School Forum prior to any modelling and consultation.

Decision required

- School Forum decide on the model for mainstream school allocation
- School Forum to decide on the model for special school allocation
- School Forum to make a decision on the supplementary money provided to the Early Years Bock for ALFEY.
- School Forum to request officers to formally consult with the Early Years sector on the budget allocation for 2020/2021

Rachael Williams
Assistant Director Education, Learning and Skills

Summary of options - Gains above the 19/20 allocations which schools would receive (these allocations will change once Oct 19 census data is used).

Assumes a disapplication of £406k (0.5% of provisional Schools Block)

DfE No.	School Name	Pupil Numbers Oct-18	19/20 Allocation £	Additional Funding No Disapplication A £	% Increase	Additional Funding Disapplication Option 1 B £	% Increase Option 1	Reduction from NFF Option 1 B - A £	Additional Funding Disapplication Option 2 C £	% Increase Option 2	Reduction from NFF Option 2 C - A £	Additional Funding Disapplication Option 3 D £	% Increase Option 3	Reduction from NFF Option 3 D - A £
2407	Furzeham Primary and Nursery School	274	1,060,759	69,379	6.54%	60,857	5.74%	(8,521)	61,770	5.82%	(7,609)	63,141	5.95%	(6,237)
2434	Curledge Street Academy	419	1,652,250	112,435	6.80%	97,589	5.91%	(14,846)	99,962	6.05%	(12,473)	98,935	5.99%	(13,500)
2438	Oldway Primary School	646	2,241,620	195,951	8.74%	195,951	8.74%	0	195,951	8.74%	0	195,951	8.74%	0
2439	White Rock Primary School	574	1,991,780	174,630	8.77%	174,630	8.77%	0	174,630	8.77%	0	174,630	8.77%	0
2453	Cockington Primary School	598	2,294,702	147,704	6.44%	128,182	5.59%	(19,522)	130,096	5.67%	(17,608)	128,836	5.61%	(18,868)
2454	Ellacombe Academy	372	1,606,604	27,349	1.70%	27,406	1.71%	57	27,353	1.70%	4	11,891	0.74%	(15,458)
2455	Homelands Primary School	208	934,733	55,051	5.89%	46,825	5.01%	(8,226)	48,938	5.24%	(6,113)	49,153	5.26%	(5,898)
2456	St. Margaret's Academy	416	1,592,953	103,271	6.48%	89,725	5.63%	(13,546)	91,223	5.73%	(12,048)	91,265	5.73%	(12,007)
2460	Watcombe Primary School	199	900,230	47,734	5.30%	37,971	4.22%	(9,763)	41,387	4.60%	(6,347)	40,071	4.45%	(7,663)
2464	Preston Primary School	328	1,166,259	96,486	8.27%	87,870	7.53%	(8,616)	87,693	7.52%	(8,793)	90,140	7.73%	(6,346)
2468	Shiphay Learning Academy	414	1,449,398	118,199	8.16%	110,259	7.61%	(7,939)	110,259	7.61%	(7,939)	110,259	7.61%	(7,939)
2469	Sherwell Valley Primary School	645	2,240,160	244,110	10.90%	244,110	10.90%	0	244,110	10.90%	0	244,110	10.90%	0
2473	Roselands Primary School	333	1,211,654	66,195	5.46%	57,570	4.75%	(8,625)	57,292	4.73%	(8,902)	59,839	4.94%	(6,356)
2474	Barton Hill Academy	612	2,805,013	49,342	1.76%	49,399	1.76%	57	49,346	1.76%	4	21,453	0.76%	(27,889)
3103	Brixham C of E Primary School	209	830,298	51,346	6.18%	44,258	5.33%	(7,089)	45,528	5.48%	(5,818)	46,754	5.63%	(4,592)
3119	Ilsham Academy	173	652,291	35,716	5.48%	30,626	4.70%	(5,090)	31,225	4.79%	(4,492)	33,418	5.12%	(2,298)
3120	Upton St. James Primary	101	487,096	37,516	7.70%	31,238	6.41%	(6,278)	34,237	7.03%	(3,279)	33,854	6.95%	(3,662)
3121	Warberry C of E Primary School	406	1,489,019	76,197	5.12%	65,429	4.39%	(10,768)	65,135	4.37%	(11,062)	67,379	4.53%	(8,818)
3600	Galmpton C of E Primary School	217	780,545	68,813	8.82%	62,690	8.03%	(6,123)	63,091	8.08%	(5,722)	65,329	8.37%	(3,484)
3601	St. Margaret Clitherow Catholic Primary School	102	451,478	41,737	9.24%	36,404	8.06%	(5,332)	38,699	8.57%	(3,038)	39,161	8.67%	(2,576)
3613	Sacred Heart Catholic Primary and Nursery School	212	867,130	54,640	6.30%	46,301	5.34%	(8,339)	48,410	5.58%	(6,230)	48,612	5.61%	(6,028)
3614	Our Lady of the Angels Catholic Primary School	167	714,829	40,197	5.62%	32,886	4.60%	(7,311)	35,217	4.93%	(4,980)	35,349	4.95%	(4,848)
3615	All Saints Babbacombe C of E Primary School	208	815,608	57,206	7.01%	49,792	6.10%	(7,414)	51,319	6.29%	(5,887)	52,240	6.41%	(4,966)
3616	St. Marychurch C of E Primary School	306	1,203,506	63,843	5.30%	53,369	4.43%	(10,474)	55,006	4.57%	(8,837)	55,363	4.60%	(8,479)
3617	Priory Roman Catholic Primary School	123	556,307	41,555	7.47%	34,976	6.29%	(6,579)	37,721	6.78%	(3,834)	37,547	6.75%	(4,008)
3618	Torre C of E Primary School	311	1,194,895	66,289	5.55%	56,399	4.72%	(9,891)	57,507	4.81%	(8,782)	58,480	4.89%	(7,810)
3619	Collaton St. Mary C of E Primary School	215	830,914	43,661	5.25%	36,778	4.43%	(6,882)	37,771	4.55%	(5,890)	39,305	4.73%	(4,356)
3751	Eden Park Primary Academy	395	1,483,871	112,909	7.61%	100,659	6.78%	(12,250)	101,671	6.85%	(11,238)	102,391	6.90%	(10,518)
3752	Kings Ash Academy	385	1,736,055	49,509	2.85%	31,350	1.81%	(18,158)	36,844	2.12%	(12,664)	32,206	1.86%	(17,302)
5200	Hayes School	404	1,606,197	78,739	4.90%	64,563	4.02%	(14,176)	66,773	4.16%	(11,966)	66,009	4.11%	(12,730)
	TOTAL PRIMARY SCHOOLS	9,972	38,848,153	2,427,706		2,186,062		(241,645)	2,226,164		(201,543)	2,193,071		(234,635)
4114	Torquay Grammar School for Girls	739	3,525,030	207,518	5.89%	207,518	5.89%	0	207,518	5.89%	0	207,518	5.89%	0
4115	Torquay Academy	1218	6,107,092	451,618	7.39%	414,613	6.79%	(37,005)	403,427	6.61%	(48,191)	412,677	6.76%	(38,941)
4116	Churston Ferrers Academy	752	3,587,040	210,256	5.86%	210,256	5.86%	0	210,256	5.86%	0	210,256	5.86%	0
4117	The Spires College	844	4,652,901	320,055	6.88%	290,209	6.24%	(29,845)	285,905	6.14%	(34,150)	289,334	6.22%	(30,721)
4118	Brixham Academy	980	4,818,951	359,232	7.45%	332,391	6.90%	(26,841)	321,284	6.67%	(37,948)	331,960	6.89%	(27,271)
4119	Paignton Community & Sports Academy	1337	7,065,552	541,449	7.66%	495,846	7.02%	(45,603)	487,216	6.90%	(54,233)	492,635	6.97%	(48,814)
4601	St Cuthbert Mayne Joint Catholic and C of E School	734	3,820,761	281,333	7.36%	255,384	6.68%	(25,949)	251,408	6.58%	(29,925)	255,086	6.68%	(26,247)
5401	Torquay Boys' Academy	800	3,816,000	227,888	5.97%	227,888	5.97%	0	227,888	5.97%	(0)	227,888	5.97%	(0)
	TOTAL SECONDARY SCHOOLS	7,404	37,393,328	2,599,349		2,434,106		(165,243)	2,394,902		(204,447)	2,427,355		(171,994)
	TOTAL PRIMARY & SECONDARY	17,376	76,241,481	5,027,055		4,620,168		(406,888)	4,621,065		(405,990)	4,620,425		(406,630)

No Disapplication Assumes a Minimum Funding Guarantee of 1.84% per pupil and a Minimum per pupil amount of £3,750 for Primary and £5,000 for Secondary. All other unit values as per National Funding Formula.

Disapplication 1 Assumes a Minimum Funding Guarantee of 1.84% per pupil and a Minimum per pupil amount of £3,750 for Primary and £5,000 for Secondary. AWPU remains at NFF values, all other unit values have a 2.70% reduction from NFF levels.

Disapplication 2 Assumes a Minimum Funding Guarantee of 1.84% per pupil and a Minimum per pupil amount of £3,750 for Primary and £5,000 for Secondary. All unit values have a 0.75% reduction from NFF values, apart from lump sum which has a 0.20% reduction.

Disapplication 3 Assumes a Minimum Funding Guarantee of 0.8% per pupil and a Minimum per pupil amount of £3,750 for Primary and £5,000 for Secondary. AWPU remains at NFF values, as does lump sum, all other unit values have had a 3.10% reduction from NFF levels.

SPECIAL SCHOOL FUNDING

COMPARISON BETWEEN 19/20 ALLOCATIONS (Place & Pupil Top-ups only) & 20/21 ALLOCATIONS WITH INCREASED PUPIL TOP-UP VALUES

	19/20 Top-up per pupil £	20/21 Top-up per pupil Option 1 £	20/21 Top-up per pupil Option 2 £	20/21 Top-up per pupil Option 3 £	Number of Places Jan 19	Number of Places Sep 19	Number of Pupils Jan 19	19/20 Funding Position			Option A		2% Funding Increase Option 1 13.31% of £1.5m growth £	Option B		4% Funding Increase Option 2 26.63% of £1.5m growth £	Option C		5% Funding Increase Option 3 33.28% of £1.5m growth £	
								Place	Pupil	Total	2% increase from 19/20 Pupil Funding B £	Total Funding A + B £		4% increase from 19/20 Pupil Funding C £	Total Funding A + C £		5% increase from 19/20 Pupil Funding D £	Total Funding A + D £		
								Funding A £	Funding £	Funding £	£	£		£	£		£	£		
Combe Pafford																				
Autism	5,132	5,555	5,979	6,191	38	38	52	380,000	266,864	646,864	288,881	668,881	22,017	310,898	690,898	44,034	321,907	701,907	55,043	
BESD 1	5,690	6,159	6,629	6,864	19	19	17	190,000	96,730	286,730	104,711	294,711	7,981	112,691	302,691	15,961	116,681	306,681	19,951	
SLD	5,567	6,026	6,486	6,715	2	2	5	20,000	27,835	47,835	30,131	50,131	2,296	32,428	52,428	4,593	33,576	53,576	5,741	
Hearing	5,444	5,893	6,342	6,567	2	2	1	20,000	5,444	25,444	5,893	25,893	449	6,342	26,342	898	6,567	26,567	1,123	
MLD 1	551	596	642	665	63	63	51	630,000	28,101	658,101	30,419	660,419	2,318	32,738	662,738	4,637	33,897	663,897	5,796	
MLD 2	1,402	1,518	1,633	1,691	53	53	42	530,000	58,884	588,884	63,742	593,742	4,858	68,600	598,600	9,716	71,029	601,029	12,145	
MLD 3	2,538	2,747	2,957	3,061	27	27	31	270,000	78,678	348,678	85,169	355,169	6,491	91,660	361,660	12,982	94,906	364,906	16,228	
PD	5,132	5,555	5,979	6,191	9	9	11	90,000	56,452	146,452	61,109	151,109	4,657	65,767	155,767	9,315	68,096	158,096	11,644	
SpecLD	2,477	2,681	2,886	2,988	4	4	2	40,000	4,954	44,954	5,363	45,363	409	5,771	45,771	817	5,976	45,976	1,022	
SLCN	4,968	5,378	5,788	5,993	32	32	35	320,000	173,880	493,880	188,226	508,226	14,346	202,571	522,571	28,691	209,744	529,744	35,864	
Visual	8,532	9,236	9,940	10,292	3	3	1	30,000	8,532	38,532	9,236	39,236	704	9,940	39,940	1,408	10,292	40,292	1,760	
Totals					252	252	248	2,520,000	806,354	3,326,354	872,881	3,392,881	66,527	939,408	3,459,408	133,054	972,672	3,492,672	166,318	
Mayfield & Chestnut																				
PMLD	12,606	13,160	13,713	13,990	52	52	45	520,000	567,270	1,087,270	592,187	1,112,187	24,917	617,104	1,137,104	49,834	629,563	1,149,563	62,293	
BESD1 - Chestnut	11,085	11,572	12,059	12,302	32	32	28	320,000	310,380	630,380	324,013	644,013	13,633	337,647	657,647	27,267	344,463	664,463	34,083	
SLD	6,752	7,049	7,345	7,493	146	156	162	1,518,333	1,093,824	2,612,157	1,141,870	2,660,203	48,046	1,189,915	2,708,249	96,091	1,213,938	2,732,272	120,114	
Totals					230	240	235	2,358,333	1,971,474	4,329,807	2,058,070	4,416,403	86,596	2,144,666	4,503,000	173,192	2,187,964	4,546,298	216,490	
Burton & Brunel																				
Brunel - SEMH	13,480	13,975	14,470	14,717	56	56	51	560,000	687,480	1,247,480	712,718	1,272,718	25,238	737,956	1,297,956	50,476	750,575	1,310,575	63,095	
Burton - AP	9,850	10,212	10,573	10,754	50	50	59	500,000	581,150	1,081,150	602,485	1,102,485	21,335	623,819	1,123,819	42,669	634,486	1,134,486	53,336	
Totals					106	106	110	1,060,000	1,268,630	2,328,630	1,315,203	2,375,203	46,573	1,361,775	2,421,775	93,145	1,385,062	2,445,062	116,432	
Special School Totals					588	598	593	5,938,333	4,046,458	9,984,791	4,246,154	10,184,487	199,696	4,445,850	10,384,183	399,392	4,545,698	10,484,031	499,240	

	19/20 Allocation £	Option A 2% Increase £	Option A Pupil top-up increase %	Option B 4% Increase £	Option B Pupil top-up increase %	Option C 5% Increase £	Option C Pupil top-up increase %
Combe Pafford	3,326,354	66,527	8.25	133,054	16.50	166,318	20.63
Mayfield & Chestnut	4,329,807	86,596	4.39	173,192	8.78	216,490	10.98
Burton & Brunel	2,328,630	46,573	3.67	93,145	7.34	116,432	9.18
Totals	9,984,791	199,696		399,392		499,240	
% of £1.5m growth		13.31%		26.63%		33.28%	

SPECIAL SCHOOL FUNDING

COMPARISON BETWEEN 19/20 ALLOCATIONS (Place & Pupil Top-ups only) & 20/21 ALLOCATIONS WITH INCREASED PUPIL TOP-UP VALUES

	19/20 Top-up per pupil £	20/21 Top-up per pupil Option 4 £	20/21 Top-up per pupil Option 5 £	20/21 Top-up per pupil Option 6 £	Number of Places Jan 19	Number of Places Sep 19	Number of Pupils Jan 19	19/20 Funding Position			Option D 8.78% increase from 19/20			Option E 7.51% increase from 19/20			Option F 9.39% increase from 19/20		
								Place Funding A £	Pupil Funding £	Total Funding £	Pupil Funding B £	Total Funding A + B £	Funding Increase Option 4 58.42% of £1.5m growth £	Pupil Funding C £	Total Funding A + C £	Funding Increase Option 5 50.00% of £1.5m growth £	Pupil Funding D £	Total Funding A + D £	Funding Increase Option 6 62.50% of £1.5m growth £
Combe Pafford																			
Autism	5,132	6,991	6,722	7,120	38	38	52	380,000	266,864	646,864	363,520	743,520	96,656	349,554	729,554	82,690	370,227	750,227	103,363
BESD 1	5,690	7,751	7,453	7,894	19	19	17	190,000	96,730	286,730	131,765	321,765	35,035	126,703	316,703	29,973	134,196	324,196	37,466
SLD	5,567	7,583	7,292	7,723	2	2	5	20,000	27,835	47,835	37,917	57,917	10,082	36,460	56,460	8,625	38,616	58,616	10,781
Hearing	5,444	7,416	7,131	7,553	2	2	1	20,000	5,444	25,444	7,416	27,416	1,972	7,131	27,131	1,687	7,553	27,553	2,109
MLD 1	551	751	722	764	63	63	51	630,000	28,101	658,101	38,279	668,279	10,178	36,808	666,808	8,707	38,985	668,985	10,884
MLD 2	1,402	1,910	1,836	1,945	53	53	42	530,000	58,884	588,884	80,211	610,211	21,327	77,130	607,130	18,246	81,691	611,691	22,807
MLD 3	2,538	3,457	3,324	3,521	27	27	31	270,000	78,678	348,678	107,174	377,174	28,496	103,057	373,057	24,379	109,152	379,152	30,474
PD	5,132	6,991	6,722	7,120	9	9	11	90,000	56,452	146,452	76,898	166,898	20,446	73,944	163,944	17,492	78,317	168,317	21,865
SpecLD	2,477	3,374	3,245	3,436	4	4	2	40,000	4,954	44,954	6,748	46,748	1,794	6,489	46,489	1,535	6,873	46,873	1,919
SLCN	4,968	6,767	6,507	6,892	32	32	35	320,000	173,880	493,880	236,858	556,858	62,978	227,758	547,758	53,878	241,228	561,228	67,348
Visual	8,532	11,622	11,176	11,837	3	3	1	30,000	8,532	38,532	11,622	41,622	3,090	11,176	41,176	2,644	11,837	41,837	3,305
Totals					252	252	248	2,520,000	806,354	3,326,354	1,098,408	3,618,408	292,054	1,056,210	3,576,210	249,856	1,118,675	3,638,675	312,321
Mayfield & Chestnut																			
PMLD	12,606	15,037	14,686	15,205	52	52	45	520,000	567,270	1,087,270	676,656	1,196,656	109,386	660,851	1,180,851	93,581	684,247	1,204,247	116,977
BESD1 - Chestnut	11,085	13,223	12,914	13,371	32	32	28	320,000	310,380	630,380	370,230	690,230	59,850	361,583	681,583	51,203	374,383	694,383	64,003
SLD	6,752	8,054	7,866	8,144	146	156	162	1,518,333	1,093,824	2,612,157	1,304,745	2,823,078	210,921	1,274,270	2,792,603	180,446	1,319,381	2,837,715	225,557
Totals					230	240	235	2,358,333	1,971,474	4,329,807	2,351,631	4,709,964	380,157	2,296,704	4,655,037	325,230	2,378,012	4,736,345	406,538
Burton & Brunel																			
Brunel - SEMH	13,480	15,652	15,339	15,803	56	56	51	560,000	687,480	1,247,480	798,275	1,358,275	110,795	782,267	1,342,267	94,787	805,963	1,365,963	118,483
Burton - AP	9,850	11,437	11,208	11,548	50	50	59	500,000	581,150	1,081,150	674,809	1,174,809	93,659	661,276	1,161,276	80,126	681,308	1,181,308	100,158
Totals					106	106	110	1,060,000	1,268,630	2,328,630	1,473,084	2,533,084	204,454	1,443,543	2,503,543	174,913	1,487,271	2,547,271	218,641
Special School Totals					588	598	593	5,938,333	4,046,458	9,984,791	4,923,123	10,861,456	876,665	4,796,458	10,734,791	750,000	4,983,958	10,922,291	937,500

	19/20 Allocation £	Option D 8.78% Increase £	Option D Pupil top-up increase %	Option E 7.51% Increase £	Option E Pupil top-up increase %	Option F 9.39% Increase £	Option F Pupil top-up increase %
Combe Pafford	3,326,354	292,054	36.22	249,856	30.99	312,321	38.73
Mayfield & Chestnut	4,329,807	380,157	19.28	325,230	16.50	406,538	20.62
Burton & Brunel	2,328,630	204,454	16.12	174,913	13.79	218,641	17.23
Totals	9,984,791	876,665		750,000		937,500	
% of £1.5m growth		58.42%		50.00%		62.50%	

School Forum 28th November 2019
De-Delegation and Centrally Retained Decisions for 2020/21

1. Why is this coming here – what decision is required?

Under the Government's current funding rules there is an assumption of delegation for a number of budget areas which are currently held centrally for maintained schools and are delegated for academies. Each year maintained schools' representative on the Schools Forum vote, by phase and on behalf of the schools they represent, to de-delegate these areas i.e. allow the LA to hold the budgets rather than delegate to schools; where it is proposed by the local authority. The outcome of the vote is binding for all maintained schools of that phase.

For 2020/21, Torbay Council Children's Services is proposing the option of de-delegation for all of the areas shown in the table below. It is for Torbay's Schools Forum to vote on each on behalf of schools. The vote is being carried out at this time to enable schools and services time plan for their budgets and responsibilities for 2020/21.

Under the national funding arrangements the government wants schools to have the opportunity to have as much funding and responsibility delegated to them as possible. The vote determines whether or not a range of costs currently met centrally will transfer to maintained schools for them to manage themselves.

Academies are not part of these arrangements since these responsibilities and the funding for them are automatically delegated to academies through the ESFA.

Actual figures for 2020/21 will change from those presented, as they will be based on the October 19 census, this data will be available towards the end of December. See individual sheet for detail and voting boxes.

2. Centrally Retained budgets

These budget areas can be retained with the agreement of the Schools Forum. For Torbay this is Planned Pupil Growth, School Admissions Service, Servicing the Schools Forum, Centrally retained element of the Early Years Block (5%) and disapplication request to transfer funds from the School Block to High Needs. The School Forum is required to approve the amounts against each budget area. See individual sheet for detail and voting boxes.

All Members of the Schools Forum have an EQUAL vote on these items.

3. Recommendations

That the Schools Forum considers the proposals and for:-

Maintained schools members vote on the de-delegation items on behalf of the phase of schools they represent.

All schools and academies vote on centrally retained items.

Rachael Williams
Assistant Director Education, Learning and Skills

SCHOOLS FORUM 28/11/19

DE-DELEGATION FOR 20/21 - DECISION FOR SCHOOL FORUM (MAINTAINED PRIMARY & SECONDARY SCHOOL MEMBERS ONLY)

THESE FIGURES WILL BE UPDATED ONCE OCT 19 PUPIL NUMBERS ARE KNOWN

DfE No.	School Name	Pupil Numbers NOR Oct-18	Eligible FSM Nos.	EAL Pupils	FSM Eligibility £	Insurance £	EAL £	Travellers Education £	Rates £	Education Functions	Total De-delegation £
2407	Furzeham Primary	274	47.00	10.32	(369)	(4,102)	(2,173)	(340)	(1,510)	0	(8,493)
2439	White Rock Primary	574	73.00	4.74	(573)	(8,593)	(998)	(712)	(3,163)	0	(14,038)
2455	Homelands Primary	208	50.00	3.51	(393)	(3,114)	(739)	(258)	(1,146)	0	(5,649)
2460	Watcombe Primary	199	67.00	1.18	(526)	(2,979)	(248)	(247)	(1,096)	0	(5,097)
2469	Sherwell Valley Primary	645	69.00	5.80	(542)	(9,656)	(1,221)	(800)	(3,554)	0	(15,772)
3103	Brixham Primary	209	37.00	0.00	(290)	(3,129)	0	(259)	(1,152)	0	(4,830)
	TOTAL PRIMARY SCHOOLS	2,109	343.00	25.55	(2,693)	(31,572)	(5,380)	(2,615)	(11,621)	0	(53,880)
4117	The Spires College	844	167.00	18.06	(1,311)	(12,635)	(3,803)	(1,047)	(4,650)	0	(23,445)
4601	St Cuthbert Mayne School	734	161.00	20.00	(1,264)	(10,988)	(4,211)	(910)	(4,044)	0	(21,418)
	TOTAL SECONDARY SCHOOLS	1,578	328.00	38.06	(2,575)	(23,623)	(8,014)	(1,957)	(8,695)	0	(44,863)
	TOTAL PRIMARY AND SECONDARY	3,687	671.00	63.61	(5,267)	(55,194)	(13,394)	(4,572)	(20,315)	0	(98,743)
PRIMARY - Is funding going to be de-delegated (Y/N)											
SECONDARY - Is funding going to be de-delegated (Y/N)											
PRIMARY / SECONDARY - Is funding going to be de-delegated (Y/N)											

	Unit Value per pupil £	Unit Value per FSM pupil £	Unit Value per EAL pupil £
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Rates (Contingency)	5.51		
Travellers Education - EAL	1.24		
Free School Meals eligibility		7.85	
Insurance	14.97		
Support to ethnic minority groups - EAL			210.56

SCHOOLS FORUM 28/11/19 - DECISIONS FOR CENTRALLY RETAINED SERVICES 2020/21 - ALL SCHOOLS

Number	Service Type	2019/20	Proposed 2020/21	Vote Y/N	Note
1	Planned Pupil Growth	£349,000	£567,000		1
2	Schools Admissions Services	£80,000	£107,000		2
3	Servicing the Schools Forum	£28,000	£30,000		2
4	Central Early Years Block provision (5% retained)	£372,100	£364,000		3
5	Funding moved from Schools Block to High Needs	£1,396,000	£406,000		4

All Members of Schools Forum have an equal vote

Notes:

- The Planned Pupil Growth is based on the 19/20 allocation as the 20/21 allocation is not yet known. PPG is required for White Rock £50k, PCSA £70k & new school St Michael's Primary from Sept 2020 £220k, the remaining £227k to fund increases in Special School places from 598 places in Sept 19 to 636 places in Sept 20.
- 1 Michael's Primary from Sept 2020 £220k, the remaining £227k to fund increases in Special School places from 598 places in Sept 19 to 636 places in Sept 20.
 - 2 These figures have been taken from the 19/20 Section 251 budget return to DfE.
 - 3 Subject to a small variation when final 20/21 Early Years allocations are known, currently based on Jan 19 numbers x the new 20/21 hourly rates.
 - 4 This is 0.5% of the provisional 20/21 Schools Block of £81.268m