



Schools Forum Meeting Agenda

Thursday, 4 December 2014 at 9.00 am
to be held in Mezzanine 3 Tor Hill House Torbay

Membership

Morris Adam
Tapp, Adam
Maurice Codd
Jeanne Cook
James Evans
Sue Foot

Dan Hallam
Roger Hughes
Mike Lock
Debbie Main
Daneian Rees
Frances Ward

1. **Apologies/Changes to Membership**
Welcome to new member – Ann Derbyshire
2. **Minutes** (Pages 1 - 5)
To agree the minutes of the School Forum on 16th October 2014 are a true and accurate record
3. **Matters Arising**
4. **Standing Item: Monitoring of Projects** (Pages 6 - 8)
 - i) *CAMHS Service Update*
 - ii) *Education Safeguarding Service*
 - iii) *Primary Teacher for Virtual School*
5. **Devon Studio Schools accessing TESS and CAMHS**
Open discussion
6. **Standing item: DSG and SEN spending outturn 14/15** (Pages 9 - 10)
7. **De- delegation and decisions** (Pages 11 - 23)
 - i) Contingencies

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

**Sue Moses, Town Hall, Castle Circus, Torquay, TQ1 3DR
01803 208401**

Email: governance.support@torbay.gov.uk

- ii) Free School Meals Eligibility
- iii) Insurance
- iv) Staff Costs – Trade Union facilitates
- v) Support for minority Ethnic Pupils and under achieving groups
- vi) Centrally retained items – Funding of pre 16 pupil growth
- vii) Centrally retained items (budgets cannot increase from 2012/13 level)- Admissions, Servicing the Schools Forum, and Capital expenditure from revenue

- 8. **School Budget Returns 2** (Pages 24 - 29)
- 9. **Fair Funding** (Pages 30 - 32)
- 10. **Further Capital Allocations for Primary School Kitchens**
Verbal update from Lisa Finn
- 11. **Future Meeting Dates**
 - 8th January 2015
 - 5th March
 - 25th June
 - 15th October
 - 3rd December
 - 7th January 2016
 - 3rd March



Minutes of the Schools Forum

16 October 2014

-: Present :-

Schools: Primary Roger Hughes, Adam Morris, Adam Tapp, Debbie Main

Maintained: Daneian Rees **Special/PRU** Mike Lock and James Evans, **Early Years:**

Jean Cook **Officers:** Richard Williams, DCS, Lisa Finn, Accountant, **Governors:**

Primary Maurice Codd **Secondary** Clive Starr

(Also in attendance: Dorothy Hadleigh (item 1) Observer Amanda Hayley, Curtis Bond, Rob Parr and Susan Moses noted)

1. Update on SEN Dorothy Hadleigh

Dorothy Hadleigh, School Services Manager (SEND) introduced and detailed the yearly update to School Forum regarding High Cost SEN Placements.

School Forum noted that:-

Joint Funded Placements : there are currently 22 children and young people placed in various provisions across the country; 19 of these are placed in the main area of need being Behaviour, Social and Emotional; 3 children were placed with very complex and profound multi learning disabilities (PMLD).

Independent School Placements: there are currently 36 children and young people who are placed with various providers, primarily within Torbay or the neighbouring areas.

School Forum noted that the SEN Team closely monitors and regularly review the progress of each placement and whether outcomes are being achieved but can only do this with what services are available in Torbay.

The Director of Children' s Services emphasised the importance of providing a whole system approach across health, education and social care to ensure positive outcomes for the young people in Torbay. He is planning a review group lead by Debbie Pritchard to look at the whole system approach in providing the best outcomes for young people.

Impact of SEND Reforms: School Forum noted the impact on the legislation which now covers the 0-25 yr age range and the need to monitor the budget due to the difficulty in forecasting unpredicted numbers of requests.

The Chair thanked Dorothy for her contribution to School Forum

Actions;

- i) **School Forum to monitor progress on high cost SEN placement budget**

2. Apologies/Changes to Membership

The Chair requested that the School Clerk co-ordinate the process of nominations/elections of a new Chair and Vice Chair for the group.

School Forum were asked for their nominations for a new Chair and Vice Chair and agreed unanimously to Roger Hughes being elected as Chair and Mike Lock as Vice Chair.

Apologises were received from Frances Ward, Sue Foot and Dan Hallam.

3. Minutes

The minutes of the School Forum of 26th June 2014 were agreed to be accurate

4. Matters Arising

Item 1: Membership: The Chair informed School Forum that a Secondary Governor was already represented and that a Secondary Academy Governor should be sought from second nominee.

Item 3: 7 (i): School Forum Standing Orders and Schools Forum matrix of responsibilities to be circulated (LF/SM)

Item 7 (i) Mechanism to remove Members from School Forum: The Chair Proposed to amend Torbay Standing Orders item 12 to read:-

“The Local Authority may end the appointment of any Forum member before the expiry of his or her term of office if the member concerned ceases to act in accordance with the seven principles of public life: selflessness, integrity, objectivity, accountability, openness, honesty and leadership”

School Forum endorsed the proposal to amend item 12 of the Standing Orders.

Item 7 DfE Capital Resources for Kitchens to deliver free School Meals for KS1: now resolved

Item 9: Pupil Premium Plus: Lisa Finn confirmed that Jane Inett has circulated the guide to all Headteachers which outlines the responsibilities of the Virtual Headteacher in the allocation of funding

5. Dedication School Grant Forecast Outturn 14/15 including SEN

Lisa Finn, Finance Manager, detailed the forecast outturn from the DfE for the 2014/15 Dedicated School Grant.

School Forum noted that the main areas of under/overspends were attributed to:-
 Joint Funded placements and Independent special school costs (overspend £23k)
 Statements Pupils and recoupment from other LA (underspend £26k)
 Statementing contingency (underspend £50k)
 Interim Tuition (underspend £189k)

School Forum recommended that any underspend is carried forward in the DSG earmarked reserve and held into the next financial year 2015/16

Action

- i) **School Forum to consider allocation of DSG earmarked reserve to schools following detailed discussions in January 2015 (LF)**

6. Statementing contingency

Lisa Finn, Finance Officer introduced the Statementing Funding report for 13/14 and 14/15 which illustrated an increase in the number of pupils and FTE's with a statement. An underspend of £50k is anticipated based on data for 14/15 in yr adjustments and same allocation profile as 13/14.

7. Equal Pay update

Lisa Finn, Finance Manager informed School Forum that following discussions with the Local Authority solicitors, the Director of Children's Services and Executive Head of Finance have agreed that the earmarked reserve should remain intact until July 2016.

School Forum discussed and questioned the rationale of allocating the £500,000 to schools with a memorandum of understanding that schools would be asked to recoup money to the Local Authority in the event of an increase in the number of claims. It was noted that ultimately the Local Authority is liable for any risks.

School Forum recommended that the Director of Children's Services seek further clarification on this proposal.

Action

- i) **Director of Children's Services to consult with Legal Team around a memorandum of understanding with schools and update School Forum at next meeting (RW)**

8. Fair Funding

Rob Parr, Principal Accountant, informed School Forum that following a review of the minimum funding levels by the EFA, Torbay's DSG has now increased by approx £1.5m.

School Forum were asked to consider the recommendation of how best to allocate this extra funding and to put forward proposals to the Director of Children's Services.

School Forum discussed possible projects that could be supported as well as Interim Tuition, SEN, Early Years and Mobility. A working party will be set up, meeting the week beginning 3rd and 17 November, to look at identifying priority spends which will include all formulas. Members of School Forum will be invited to attend.

Actions

- i) **Representative from School Forum to be elected and invited to a working party meeting (FAR) (RH/LF)**
- ii) **School Forum to consider recommendations of FAR on identified priority areas and make recommendations to the Director of Children's Services at the next meeting (LF)**

9. Standing item: Monitoring of Projects

The Director of Children's Services presented the update on School Forum's initiatives.

School Forum noted that:-

CAMHS: Staff recruitment has been successful.

Education Safeguarding Service: Two TESS Education Social Workers have been appointed (Sara James and Hayley Mason) and are based at Paignton Community & Sports Academy alongside the SEN and safeguarding team.

Virtual School: Adverts have been posted for the Primary Teacher and interviews will be held on 17th October.

The Director of Children's Service asked School Forum to consider a proposal by the Devon Studio School to access to the TESS service.

School Forum considered the proposal and discussed the funding and capacity issues of the TESS service to support referrals from the Devon Studio School. Taking into consideration the small number of young people and a duty to safeguard young people in an education setting it was agreed, by School Forum, that the Devon Studio School could access the TESS service subject to a charge. South Devon College was discussed and it was agreed that they should not access the service.

Appendix 2: The Director of Children's Services updated the School Forum on the staff changes to the Education structure within Children's Services.

Actions

- i) **Children's Finance to explore charging process for Devon Studio School to access TESS service (LF)**

- ii) **School Forum to review and monitor referral numbers to TESS service (RH/LF)**

10. **Future Meeting Dates**

The future dates of the School Forum are:

4 th December 2014	0900-1130	Mezzanine 3 Tor Hill House
8 th January 2015	0900-1130	Boardroom Town Hall
5 th March 2015	0900-1130	Boardroom Town Hall

Action

- i) **Future dates to be planned (RH/LF)**

Title:	Update on CAMHS Primary Mental Health Service in Schools		
Prepared by:	Jackie Olsen Primary Mental Health Work- Team Leader	Contributors:	Corinne Foy- Service Manager
Date Edited/Amended:	25 th November 2014		

1. Purpose of the Paper

The purpose of this document is to inform the Safeguarding and CAMHS Steering Group and Schools Forum an update on the progress of the Primary Mental Health Service in schools.

2. Recruitment

There have been several rounds of advertising and recruitment since August involving Brian Chapman, school nurse lead and a young people's panel. All posts have been appointed to and are now awaiting DBS clearance to start. Start dates have been agreed with some appointees pending DBS. Staff still to start are detailed below;

Band 6 – Primary Mental Health Workers

1.0wte – Joanne Peel – Start date 01.12.14

0.5 wte – Jayne Fayter – Start date TBC

3. Service Model

3.1 Torbay schools have been arranged within cluster's which has been agreed with Suzie Franklin, all of which have a secondary school and a number of feeder primary's. Each cluster will be assigned a PMHW (1 WTE).

3.2 PMHW Team Leader met with all proposed school hosts in October and requirements for the PMHW bases were established. Following this schools within each cluster were invited to a meeting, within the host school, to introduce the service and the cluster workers.

Cluster meetings have now been undertaken within Brixham cluster, Paignton (PCSA) cluster, Paignton (Torbay School) cluster, Torquay (St Cuthbert Mayne) and Torquay (Torquay Academy) cluster. The remaining cluster (Westlands) will be rolled out in January, when the staff team is at full quota.

3.3 It is recognised that each cluster may have different requirements and the service will be flexible within the commissioning envelope to respond to this.

4. Accommodation

4.1 Staff are now based within Torquay Academy, PCSA and Torbay School . Chesnut have offered a base, however there are some technical issues which may mean a base is sought at an alternative school within Brixham. St Cuthbert Mayne School have now offered to host PMHWs, after Watcombe decided that they were unable to find space to accommodate a worker. St Cuthbert Mayne are currently making minor alterations to the room, which it is hoped will be completed in the next two weeks.

4.2 All staff now have VPNs enabling access to NHS record keeping and IT systems. There have been some issues encountering school internet privacy settings, however these are gradually being overcome within individual establishments.

5. Performance Report

5.1 Specific service Key Performance Indicators (KPI's) have been agreed between provider and schools and published in the updated service specification. This will be monitored by the Safeguarding and CAMHS forum which will be attended by a CAMHS Manager.

6. Communication

6.1 CAMHS Service Manager and PMHW Team Leader plan to meet with a local publishing house to source appropriate communications to be sent to schools and the wider professional network by early December.

6.2 PMHW Team leader now regularly joins the early help panel where she offers a CAMHS perspective on cases discussed and also updates on any current/previous CAMHS involvement.

6.3 Following requests from a number of different professionals PMHW Team Leader has joined the PRU panel on one occasion and plans to link in to this forum until Christmas when a review of the usefulness of this is planned. Early feedback from those present at the meeting is that a PMHW perspective was useful in enabling issues regarding education provision of some young people to be resolved quickly.

6.4 The Thrive working group have requested that Jackie join their meeting, however Jackie has not yet been able to attend. It is planned that she will attend one meeting to update on the new PMHW provision and then ascertain the usefulness of further attendance.

6.5 Update on the new service was provided to the Designated Safeguarding Officer Meeting, chaired by Anthony Gobel.

6.6 A presentation regarding the new PMHW service was at the SEN/Educational Psychologists/specialist teachers' half termly meeting in early November.

6.7 A joint meeting of the PMHW and School Nurse teams has been scheduled for early January, where the two teams will be encouraged to consider how they can ensure joined up working within their clusters, to avoid duplication of services.

7. Emotional Health and Wellbeing in Schools Pathway

7.1 PMHW Team Leader has now completed a draft of this document, which will be shared with the pathway group at a meeting in January. Following this meeting the completed pathway will be circulated to schools.

8. Training

8.1 The team are currently developing programmes, to be delivered as twilight sessions to school communities. The initial programme is an 'Understanding Mental Health/Resilience Building' course, which could be adapted for Primary and Secondary Schools. The team are also planning a basic needs analysis of training across Torbay Schools.

8.2 The PMHW team are also offering a number of training sessions to Torbay Council staff, as part of the CAMHS training offer. PMHW Team Leader is meeting with Lucinda Wills in December to plan dates for 2015.

9. Other Issues

9.1 The PMHW are not currently Thrived trained; however a number of schools are identifying a clear role for the PMHW staff to support Thrive provision within their establishments. With this in mind a reasonable quote has been sourced to train the whole team, however at present the funding for this has not been secured.

To – Schools Forum – 16th October 2014

2014/15 Dedicated Schools Grant (DSG) – Forecast Outturn

Introduction

The DfE confirmed that the 2014/15 Dedicated Schools Grant (DSG) is £88.8m of which an estimated £47m is deducted to fund Academy Schools leaving £41.7m for our maintained schools and education services.

Dedicated Schools Grant (DSG) funded activities are forecast to underspend by £600k

The main areas of under/overspends

The main area of underspend relates to the relatively new funding for 2 year old nursery places. Based upon recent take up of places there is a forecast underspend of £350k on a budget allocation of £1.8m, which amounts to a 20% underspend.

Joint funded placements and Independent special school costs are a volatile area and the current forecast overspend of £23k could quite easily turn into an underspend.

Statements Pupils and recoupment from other Local Authorities is forecasting an underspend of £26k

Statementing contingency (in-year adjustments to statementing is forecast to underspend by £35k – see separate paper on detailed analysis

Interim Tuition (incl hospital) forecast underspend of £189k. This reflects the changes to service delivery over the last few months

Recommendations

That any underspend is carried forward in the DSG earmarked reserve or some or all of it is considered for allocating to all schools in January 2015 at which time the final outturn will be more reliable. As £350k of this underspend relates to 2 years member will want to consider whether any in-year allocation is distributed to nursery providers.

**Lisa Finn Finance Manager – Children’s/Adults/Supporting People Services
 16th October 2014**

Statementing Funding for 13/14 & 14/15

	13/14	14/15	Increase / (Decrease)
Number of pupils with a statement	354	370	16
Number of FTE's with a statement	321.42	327.83	6.41
	£	£	£
Funding below £6k allocated through school formula elements	1,821,537	1,906,969	85,432
Funding above £6k allocated as a top-up per eligible pupil	436,380	609,047	172,667
Statementing Contingency	254,000	221,000	(33,000)
In-Year adjustments			
April	33,168	62,908	29,740
May	32,051	23,756	(8,295)
June	17,311	14,946	(2,365)
July	(5,150)	(2,628)	2,522
August	20,506	594	(19,912)
September	13,684	7,260	(6,424)
October	17,916	39,608	21,692
November	1,570	(4,832)	(6,402)
December	9,563	9,563	0
January	15,874	15,874	0
February	3,794	3,794	0
March	15,081	15,081	0
Total - In-Year adjustments	175,368	185,924	
Projected underspend		(35,076)	

Notes

There was a £78k underspend against the statementing contingency in 13/14. Statementing funding allocated to schools as part of the 14/15 initial allocations increased by £258k. Statementing contingency budget has been reduced by £33k in 14/15 due to the 13/14 underspend. Based on April to November 14/15 in-yr adjustments and the same allocation profile as 13/14 for adjustments for the remainder of the financial year, it is anticipated the statementing contingency will underspend by £35k.

To – Schools Forum – 4th December 2014

De-Delegation and Centrally Retained Decisions for 2015/16

1. Recommendations

That the Schools Forum considers the issues in this report and maintained schools members vote on each heading on behalf of the schools they represent.

2. 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 can vote, by phase and on behalf of the schools they represent, to de-delegate these areas where it is proposed by the local authority. The outcome of the vote is binding for all maintained schools of that phase.

The authority is proposing the option of de-delegation for all of these areas for 2015/16 to enable the 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 2015/16.

Under the new 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. The budget for these costs would also transfer to schools on a formula basis which we consulted on in 2013/14.

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

The budgets de-delegated last year following the equivalent vote are set out in the table below. The values are the 2014/15 budget levels for all primary and secondary schools (i.e. excluding academies) to provide the context of the values involved. Actual figures for 2015/16 will be finalised over the next couple of months as the settlement and the school census become available. See appendix 1 for detail and voting boxes

Budget/Service Area	Primary £	Secondary £
Free School meals Eligibility	4,200	2,913
Insurance	55,883	27,784
Facilities/Union Activities	5,376	2,673
English as an Additional Language	15,857	7,361
Travellers Education	4,629	2,301
Business Rates Contingency	20,569	10,227
Total	106,513	53,259

3. Centrally Retained budgets

These budget areas can be retained before allocating formula with the agreement of the Schools Forum. For Torbay this is pupil growth

There are also other centrally retained budget areas which can also be retained before allocating formula but no new commitments or budget increases can be approved. The School Forum is required to approve the amounts against each budget area. For Torbay this includes Admissions, Servicing of the Schools Forum and Capital expenditure funded from revenue. See appendix 2 for details and voting boxes

All Members of the Schools Forum can vote on these items.

Lisa Finn
Finance Manager
01803 208283

NASUWT

Dear Schools Forum

I am writing on behalf of all employees working within the boundaries of your local authority area who are members of the NASUWT and in support of other recognised professional teaching trade unions including ATL, NAHT the NUT.

You will recall that, from April 2013, local schools agreed through your Schools Forum to 'de-delegate' funding for supply cover costs, including for trade union facilities time. We believe that this was the right decision – and a very big majority of Schools Forums made the same decision.

We believe that the central retention and distribution of the fund is the most effective and efficient arrangement and we would like to work with you to ensure that this arrangement continues. Discussions are now taking place in your authority on funding arrangements for supply cover costs from April 2015 and I am asking you to pass the information in this letter to members in your Schools Forum and to encourage them to vote again for de-delegation of funding arrangements for supply cover costs from 2015.

Successive governments have recognised the importance of good industrial relations and have legislated to provide a statutory basis for facilities time as follows.

- Paid time off for union representatives to accompany a worker to a disciplinary or grievance hearing.
- Paid time off for union representatives to carry out trade union duties.
- Paid time off for union representatives to attend union training.
- Paid time off for union 'learning representatives' to carry out relevant learning activities.
- Paid time for union health and safety representatives during working hours to carry out health and safety functions.

These provisions are contained within the Employment Relations Act 1999 and the Trade Union Labour Relations (Consolidation) Act 1992 and the Safety Representatives and Safety Committees Regulations 1997.

NASUWT have members and union representatives in academies as well as maintained schools within your local authority area and, in addition to seeking your support for continued de-delegation, we are seeking your agreement for the local trade union funding arrangement to be formally extended to academies within your local authority boundaries.

The trade union recognition agreement between the authority and the recognised unions will have transferred to the academy school as the new employer of the transferred staff as part of the conversion process to academy status under TUPE. We believe that, following conversion, academies should also become parties to local authority trade union facilities arrangements.

The academies within your boundaries will have received funding for trade union facilities time in their budgets and they are entitled to use that funding to buy-back into local authority arrangements. Indeed, many academies across England have already agreed to buy in to local authority trade union facilities arrangements.

Pooled funding will help the local authority and all schools to meet their statutory obligations on trade union facilities time. Setting up a central funding arrangement will allow academies to pay into a central pool if they wish to. But most importantly it will help maintain a coherent industrial relations environment where issues and concerns whether individual or collective can be dealt with more effectively.

We urge you therefore to support the de-delegation funding for supply cover costs and to continue or establish a mechanism whereby academies within your boundaries are able to buy into a central fund for trade union facilities time. If you agree to do so, we will write to academy principals to encourage them to buy in to your arrangement.

Yours sincerely

John Cornish
Torbay NASUWT Negotiating Secretary

SCHOOLS FORMULA MODELLING FOR 15/16 - DE-DELEGATION - DECISION FOR SCHOOL FORUM MAINTAINED SCHOOLS MEMBERS

APPENDIX 1

THESE FIGURES WILL BE UPDATED ONCE OCT 14 PUPIL NUMBERS ARE KNOWN

DfE No.	School Name	Pupil Numbers NOR Oct-13	Eligible FSM Nos.	EAL Pupils	FSM Eligibility £	Insurance £	Facilities / Union Activities £	EAL £	Travellers Education £	Rates Contingency £	Total De-delegation £
2407	Furzeham Primary	252	54.00	4.78	(424)	(3,772)	(363)	(1,006)	(312)	(1,389)	(7,266)
2438	Oldway Primary	640	67.00	8.15	(526)	(9,581)	(922)	(1,715)	(794)	(3,526)	(17,063)
2439	White Rock Primary	442	33.00	5.92	(259)	(6,617)	(636)	(1,248)	(548)	(2,435)	(11,743)
2455	Homelands Primary	206	54.00	2.34	(424)	(3,084)	(297)	(493)	(255)	(1,135)	(5,688)
2460	Watcombe Primary	194	73.00	2.26	(573)	(2,904)	(279)	(475)	(241)	(1,069)	(5,541)
2469	Sherwell Valley Primary	629	60.00	19.84	(471)	(9,416)	(906)	(4,177)	(780)	(3,466)	(19,216)
2473	Roselands Primary	299	45.00	11.77	(353)	(4,476)	(431)	(2,479)	(371)	(1,647)	(9,757)
3103	Brixham Primary	206	31.00	2.34	(243)	(3,084)	(297)	(493)	(255)	(1,135)	(5,507)
3120	Upton St. James Primary	100	35.00	1.15	(275)	(1,497)	(144)	(242)	(124)	(551)	(2,833)
3121	Warberry Primary	349	44.00	14.49	(345)	(5,225)	(503)	(3,051)	(433)	(1,923)	(11,480)
3600	Gallington CoFE Primary	210	25.00	2.27	(196)	(3,144)	(302)	(478)	(260)	(1,157)	(5,538)
3619	Collaton St. Mary CoFE Primary	206	14.00	0.00	(110)	(3,084)	(297)	0	(255)	(1,135)	(4,881)
	TOTAL PRIMARY SCHOOLS	3,733	535.00	75.31	(4,200)	(55,883)	(5,376)	(15,857)	(4,629)	(20,569)	(106,513)
4117	Westlands School	996	236.10	8.93	(1,853)	(14,910)	(1,434)	(1,880)	(1,235)	(5,488)	(26,801)
4601	St.Cuthbert Mayne School	860	135.00	26.03	(1,060)	(12,874)	(1,238)	(5,481)	(1,066)	(4,739)	(26,458)
	TOTAL SECONDARY SCHOOLS	1,856	371.10	34.96	(2,913)	(27,784)	(2,673)	(7,361)	(2,301)	(10,227)	(53,259)
	TOTAL PRIMARY AND SECONDARY	5,589	906.10	110.27	(7,113)	(83,667)	(8,048)	(23,218)	(6,930)	(30,795)	(159,772)

Is funding going to be de-delegated in 15/16 (Y / N) PRIMARY

Is funding going to be de-delegated in 15/16 (Y / N) SECONDARY

	Unit Value per pupil Primary £	Unit Value per FSM pupil Primary £	Unit Value per EAL pupil Primary £	Unit Value per pupil Secondary £	Unit Value per FSM pupil Secondary £	Unit Value per EAL pupil Secondary £
Rates (Contingency)	5.51			5.51		
Travellers Education - EAL	1.24			1.24		
Free School Meals eligibility		7.85			7.85	
Insurance	14.97			14.97		
Staff costs supply cover - Facilities	1.44			1.44		
Support to ethnic minority groups - EAL			210.56			
Totals	23.16	7.85	210.56	23.16	7.85	210.56

DECISIONS FOR CENTRALLY RETAINED SERVICES 2015/16

APPENDIX 2

Service Type	2014/15	Comment	Proposed 2015/16	Comment	Vote Y/N
1 Significant Pupil Growth	105,000	Cockington, Warberry & Torre	105,000	confirmation of pupil numbers is needed	
2 Schools Admissions Services	94,000		80,000	to be confirmed	
3 Servicing the Schools Forum	53,000	to reduce to reflect fewer officers	28,000	to reflect changes in staffing	
4 Capital Expenditure from Revenue	9,000		-	not necessary	

All Members of Schools Forum have an equal vote

EAL / ETHNIC MINORITY ACHIEVEMENT SERVICE	
This is a service for maintained schools and academies	
WHAT WILL THE SERVICE PROVIDE?	<p>The EAL/Ethnic Minority Achievement Service will provide:</p> <ul style="list-style-type: none"> ▪ support and advice for new arrivals, and children causing concern in schools and early years settings ▪ analysis of EAL/BME pupil data to monitor attainment and progress; identify barriers to achievement and work with schools to address these ▪ assessment materials for newly arrived pupils based on the common scale of assessment for EAL as set out in 'A Language in Common'; advice and resources to support newly arrived pupils ▪ support for language and literacy development in more advanced EAL pupils, e.g. writing analysis, targets, strategies, resources, writing booster group resources and teaching sessions ▪ procedures, advice and checklists for identification of EAL pupils who may also have SEN, including writing reports, assessment of first language skills through an interpreter ▪ observation and reports, advice, resources and strategies to support those whose progress is causing concern and those arriving at upper KS2, KS3 or KS4 ▪ liaison with other agencies, including SLT, EP, SEN and provision of interpreters for meetings with parents/carers ▪ support for schools to meet the needs of isolated EAL/BME pupils, e.g. through Pupil Voice sessions ▪ EAL training sessions centrally and in schools ▪ read, store and respond to all racist incident report forms ▪ anti-racism training + advice and guidance for all schools ▪ support for self-evaluation and review of current provision, practice and policies <p>The Gypsy Roma and Traveller Achievement Service will provide</p> <ul style="list-style-type: none"> ▪ analysis of pupil tracking data to monitor attainment, progress and attendance and work with schools and families to improve performance and attendance ▪ support for procedures to identify GR&T pupils who may have SEN and access to specialist services for mobile GR&T pupils with special needs. ▪ race equality and anti-racism training that includes the GR&T community ▪ integrated working, e.g. with Compliance Manager, Health Visitors, Community Engagement, to record the arrival of GR&T children in Torbay and departures. ▪ secure and support access to educational provision at any age for GR&T pupils who arrive in Torbay
CHARGE	<p>Maintained schools have agreed, through the School Forum, to de-delegate funding to continue a central service to provide advice and support for children who have EAL and GR&T children. There is no additional charge to maintained schools for the service.</p>
KEY CONTACT	<p>Jean Jackson, Consultant, Ethnic Minority Achievement</p> <p>jean.jackson@torbay.gov.uk 01803 208910</p>

School Forum 5th December 2013

Optional de-delegation for maintained schools

There are some services where the Schools Forum on behalf of maintained schools are able to decide that some funding should be taken out of their pre-16 formula budgets before they receive them and moved to central funding. These are:

- a. contingencies (including support for schools supporting schools networks, TGA and NNDR re evaluations);
- b. administration of free school meals (FSM) eligibility;
- c. insurance;
- d. staff costs – trade union facilities agreement;
- e. support for minority ethnic pupils or underachieving groups;

For each of these, it is be for the schools forum members in the relevant phase (primary or secondary) to decide whether that service should be retained centrally. The decision will apply to all maintained schools in that phase and will mean that the funding for these services was removed from the formula before school budgets were issued. There could be different decisions made for each phase. Academies can buy back into local authority services, as is the case for maintained schools where funding remains delegated. There is an issue here that if only some schools buy back a service the delivery of the service may not be viable and will not be available to any schools.

A1. Contingencies – Schools Supporting Schools network- £165,000 , NNDR re-evaluations- £39,000 and TGA- £211

National Non Domestic Rates(NNDR) contingency

National Non Domestic Rates (NNDR) contingency is for in year support to schools who have rate re evaluations and have to pay higher rates as a result. The higher amount is fed into the following years formula allocation this is just for the in year increases which can be substantial. Delegation will mean that schools who have in year re evaluations

will have to pay for these and any previous years back payments from within their formula allocation. These can be substantial.

Schools supporting schools network .

Subscription to this service provides access to:

- all curriculum networks- literacy network, maths network, ICT network, SEN and Inclusion network, Curriculum Development network.
- school evaluation partner annual data/head teachers performance management visit.
- activities outlined for the school leadership Academy which supports newly qualified head teachers, aspirant leaders
- support for all primary and special school NQTs including additional support for those not making appropriate progress.

Torbay Governors Association

This funding is to contribute towards the administration costs of TGA to aid the communication between TGA, schools and the LA.

A2. Administration of free school meals (FSM) eligibility- £9,000

Introduction

A parent or guardian can claim free school meals for their child if they meet specific criteria related to benefit entitlement and level of income. This is to ensure that children from low income families receive a nutritious meal each day to maximise their capacity for learning. For every child who receives free school meals the school can claim a pupil premium to pay for the additional support these children are likely to need. This is currently worth £630 per year for each pupil who has been entitled to free school meals at any time in the last 6 years and has risen to £900 in 2013/14. It is therefore in a school's interest to ensure that all pupils who are entitled to free school meals are identified. It is also worth noting that more than £4m is distributed through the Torbay Schools Funding Formula according to the numbers of pupils in a school eligible for free school meals.

Entitlement Process

The Department for Education has a database, the Eligibility Checking Service, that organisations can use to check eligibility of individual parents and guardians. The

process involves inputting national insurance number, parent's date of birth and surname. The system then checks against listed benefit claimants and indicates whether there is a match with the data on the system.

Options

Schools have the option of purchasing an eligibility checking service that will undertake the above process very cheaply. However, this is generally where the service stops.

Torbay Council's Free School Meals Service, however, will contact any parent who has applied for free school meals and who is not found on the system and will invite them to provide other proof of entitlement e.g. a letter from the relevant government department. This is important because there is often a considerable time lag between date of entitlement and listing on the database.

Often the parent has made a simple error, e.g. an incorrect digit in their national insurance number. The council checks these details with parents who believe that they should be entitled.

The council notifies schools of all pupils who are recorded as being entitled to free school meals and all pupils where a query is being followed up.

The council checks all claimants periodically to verify their continued entitlement and again, will pursue any claimant who is shown as no longer entitled. Schools are notified about these parents and encouraged to support them in providing new evidence if their claim should be ongoing.

When the last check was made against the database, of approximately 3,200 children there were 328 queries, i.e. where the database indicated no entitlement. When these were followed up individually 33 pupils were found to still be entitled to free school meals i.e. 10% of rejected claims.

Equality issues

It is important that children who are entitled to free school meals receive them; also that parents who are no longer entitled to claim are identified and asked to pay for school meals. The council undertakes to check eligibility during the second part of the summer term for existing pupils and in September for new pupils so that schools have accurate data for the October census date. Additional checks are undertaken during the winter months. The council checks eligibility for all children at the same time, including siblings attending different schools. This ensures consistency.

Conclusion

A centralised free school meals service is good value and supports

- Children from low income families in receiving regular nutritious meals
- Parents in receiving the financial help to which they are entitled
- Schools in receiving appropriate funding for the entitled pupils who are more likely to need additional support

A 3. Insurance. £106,000

School Insurance Service

The Council's dedicated Insurance and Claims Handling Team is responsible for arranging and administering the Council's Corporate insurances as well as providing advice and guidance with all insurance/claims related matters, general risk management and dealing with all aspects of civil liability.

Structure and Functions of the Insurance and Claims Handling Team

The Insurance team will:

- arrange placement of a comprehensive package of insurances
- information and clarification on existing policy cover.
- advice and guidance regarding insurance implications for events and activities, property issues, school trips and hiring of school facilities.
- advice on potential claims and management of claims along with associated correspondence.
- undertake mid term adjustments, additions and deletions in cover required to reflect risk exposure as well as arrangements and management of engineering inspection reports.
- Upon request, the team can assist in scrutinising legal documentation, such as contracts with third parties, to ensure that as far as possible any residual risk is transferred through appropriately worded indemnities.
- arrange statistical reporting and claims analysis

The Civil Litigation Claims Handling will:

In the event a liability claim arises, a legally qualified member of the claims handling team will deal with all correspondence with Solicitors and third parties and undertake a detailed investigation into the causes of the incident. This may involve interviewing staff and inspecting the accident location by prior arrangement with the school.

The Insurance and Claims Handling teams are based at the Town Hall in Torquay. However, there may be occasions when attendance at schools is appropriate and these visits can be arranged by appointment.

Advantages of the Council's Corporate Insurance and Claims Handling Services

There are many advantages of being part of the Council's corporate insurance and claims handling service, not least because of:-

- The economy of scale and managed risk profile ensures that Torbay Council are able to pass on to Schools the advantageous premium costs and insurance terms obtained.
- The provision of a comprehensive range of insurance policies with high levels of indemnity to ensure financial risk protection of key exposures which includes:- public and employer's liabilities (including Governors liability whilst acting on behalf of the LA), motor, officials' indemnity, fidelity guarantee, property (buildings and contents), school journey and personal accident insurance – all arranged through a competitive tender in accordance with industry best practice, EU Service Procurement Directives and Financial regulations.
- Financial security for schools with excess payments being centrally met by the Council.
- management of all corporate insurance claims related matters
- advice and guidance regarding insurance implications for events and activities, property issues, school trips and hiring of school facilities
- reinstatement valuations of LA properties
- Regulatory engineering inspections
- guidance and support on day to day management of risks and Insurance implications
- mid term adjustments, additions and deletions in cover required to reflect risk exposure
- Continuity of service.

- Proven track record for schools with existing local knowledge of specific insurance and claim requirements enabling closer communications.
- Support and access to the Council's corporate services.

Please note that when funding for insurance is delegated to any school, the school shall demonstrate at the time of application for delegated funds, to the satisfaction of the Section 151 Officer (Executive Head of Finance), that cover relevant to the Council's insurable interests, under a policy/policies to be arranged by the Governing Board, is as good as the relevant minimum cover arranged by Torbay Council and is sufficient to protect Torbay Council.

Failure to comply with the minimum levels of insurance cover may result in additional costs being recharged to Schools.

A 5. Staff costs – supply cover (trade union) £10,000.

The only budget funded from this area is the Teacher Unions Facilities funding which releases union representatives to negotiate with the Council to resolve disputes and produce draft school policies.

A6. English as an Additional Language support service. Support for minority ethnic pupils or underachieving groups - £32,000

Gypsy Roma and traveler education. £9,000

Agenda Item 8

SCHOOL BUDGET RETURN (SBR2) SCHOOLS FORUM 4TH DECEMBER 2014

Background

As part of the Scheme for Financing Schools, all Torbay Schools are required to submit a twice yearly return detailing how the previous year's unspent balance is to be utilised in the coming year, together with a forecast balance for the END OF current year. The returns are called SBR1 (to be submitted by 31st May each year) and SBR2 (to be submitted by 31st October each year). This paper is reporting on data submitted by all maintained schools for the SBR2.

2013/14 Overall Findings and Conclusions

The level of unspent balances as at 31st March 2014 was £2.5m (column 1). The Primary phase had the largest balances totalling £1.1m. Secondary Schools were holding balances of £1.1m. Special schools were holding total balances of £0.3m.

The balances shown are for maintained schools only, academy balances as at 31st March 2014 have been excluded.

2014/15 Overall Findings and Conclusions

The forecast level of unspent balances at the end of 2014/15 is £2m (column 6). This is slightly higher than the previous year. It is generally the case that schools are pessimistic in their forecasting at this time of the financial year. There is an assumption that any capital works will finish on schedule.

The Primary phase is forecasting that balances will be £0.6m – a decrease of £0.5m since March '14. There are no deficits included in this forecast.

For the Secondary phase, there is a forecast balance of £1.2m – broadly the same level as March '14.

Special Schools are forecasting a total unspent balance of £0.2m, broadly in line with the balances as at the end of 2013/14. The distribution of the balances between the three special schools has remained the same.

Use of the forecast 2014/15 unspent balances

The budget return requires schools to identify how the forecast balance is made up, in order to identify which schools have drawn forward capital funding and which schools are holding balances on behalf of the school with in Torbay for specific networks.

The budget return process also requests that schools consider how their forecast unspent balances for 14/15 will be utilised in the future. The DfE are keen that schools do not accumulate excessive balances without a clear view as to their future use.

Therefore in columns 12 to 17, schools are asked to analyse how their forecast unspent balances will be used. In the vast majority of schools, the operational contingency is considered to be the most appropriate use. This aims to cover instances of schools with falling rolls with their balances being used to smooth out the effect of reorganisation of classes.

Schools have also identified £0.3m for improvements in premises and facilities, which is a reflection on the decreased level of Devolved Formula Capital Funding. A significant number of schools have identified £0.5m for investment in curriculum initiatives, a reflection of the need to improve standards in schools.

The Level of Forecast 2014/15 Unspent Balances

Both the Torbay Scheme for Financing Schools and the DfE state that where possible surplus balances for Primary and Special Schools, should be no more than 8% of that year's revenue budget (column 21). For Torbay; Upton St James and Collaton St Mary are the only schools to have a balance forecast greater than this.

For Secondary Schools, the recommended level of surplus balances is 5% (column 21). St Cuthbert Mayne is the only school where the forecast balance is greater than this.

Amanda Haley
Principal Accountant Schools – Children's Services
01803 208284
20th November 2014

SCHOOL BUDGET RETURNS - SBR2 2014/15 FOR SCHOOLS FORUM DECEMBER 4TH 2014

DfE No.	School Name	19	20	21	22	23	MEMORANDUM ITEMS			
		Operational Contingency > 8% Prim & Spec; > 5% for Secs of Total Budget	Operational Contingency > 8% Prim & Spec; > 5% for Secs	TOTAL C/fwd % of Total budget	TOTAL Carry Fwds' > 8% Prim & Spec; > 5% for Secs	Capital works due for completion 2014/15	31.3.15 Outstanding School Loan Amount £	Carry Forwards after Adjustment for School Loans £	Difference betw Unspent Balance 31st March 14 & forecast balance 31st March 15 + = inc/ () = decr £	Difference betw Unspent Balance 31st March 14 & forecast balance 31st March 15 + = inc/ () = decr %
2407	Furzeham Primary	0.00%	no	1.97%	no		22,339	(43,407)	-66%	
2438	Oldway Primary	0.00%	no	3.58%	no		87,640	(9,747)	-10%	
2439	White Rock Primary	1.64%	no	4.45%	no		76,820	(136,916)	-64%	
2455	Homelands Primary	0.19%	no	3.74%	no		40,237	(31,824)	-44%	
2460	Watcombe Primary	0.00%	no	3.63%	no		42,139	4,903	13%	
2469	Sherwell Valley	0.52%	no	0.52%	no		12,380	(75,107)	-86%	
2473	Roselands	4.32%	no	0.00%	no		0	(131,050)	-100%	
3103	Brixham C of E Primary	0.47%	no	4.03%	no	7,500	41,925	(32,134)	-43%	
3120	Upton St James	6.56%	no	9.78%	**YES**	9,967	59,898	(19,096)	-24%	
3121	Warberry	1.57%	no	1.57%	no		23,371	(71,371)	-75%	
3600	Gaimpton	3.62%	no	3.62%	no		29,555	(10,840)	-27%	
3619	Collaton St Mary	2.32%	no	8.95%	**YES**		77,309	(24,389)	-24%	
	Totals - Primary						0	(580,978)	-53%	
	Secondary Schools									
4117	Westlands	4.16%	no	9.26%	**YES**		700,928	50,835	8%	
4601	St Cuthbert Mayne	6.36%	**YES**	9.05%	**YES**		493,349	(4,043)	-1%	
	Totals - Secondary						0	46,792	4%	
	Special Schools									
1106	Torbay PRU	3.95%	no	7.50%	no		76,040	(43)	0%	
7042	Mayfield	0.00%	no	3.66%	no		123,762	(28,685)	-19%	
7046	Torbay EBD	3.06%	no	3.06%	no		38,078	(44,308)	-54%	
	Totals - Specials						0	(73,036)	-23%	
	Overall Total						0	(607,222)	(0)	

Analysis of forecast year end expenditure for Maintained School salary costs

DfES No.	School Name	Teaching Staff	Admin Staff	Apprentices	LSA	MTA	Nursery Staff	Cleaning & Premises Staff	Technicians	Kitchen Staff
2407	Furzeham Primary	519,672	61,633	-	184,989	25,929	78,220	33,894	-	-
2438	Oldway Primary	1,265,498	146,262	-	492,533	60,504	-	78,000	-	-
2439	White Rock Primary	820,691	104,554	-	274,278	34,350	-	59,494	23,759	27,000
2455	Homelands Primary	478,402	44,060	-	199,426	25,510	-	-	-	-
2460	Watcombe Primary	586,053	58,944	-	242,712	10,957	15,650	30,423	-	-
2469	Sherwell Valley	1,234,263	92,518	7,654	541,112	62,721	-	39,702	-	41,142
2473	Roselands	582,851	62,747	-	290,505	25,677	-	33,594	30,400	19,318
3103	Brixham C of E Primary	501,688	45,458	-	206,058	14,706	-	-	-	-
3120	Upton St James	259,235	36,821	-	93,382	7,074	-	14,357	-	-
3121	Warberry	734,334	78,147	-	228,307	29,334	21,204	37,836	17,724	-
3600	Galampton	398,604	46,149	-	148,790	11,044	-	19,688	-	-
3619	Collaton St Mary	400,206	36,891	-	165,847	9,654	-	-	-	-
	Totals - Primary									
	Secondary Schools									
4117	Westlands	3,430,000								
4601	St Cuthbert Mayne	3,013,452	454,128	14,710	319,036	16,859	-	129,062	239,388	-
	Totals - Secondary									
	Special Schools									
4106	Pupil referral Unit	413,916	97,080	-	180,450	-	-	14,562	-	-
4042	Mayfield	1,042,523	197,110	-	909,828	17,900	19,500	23,563	-	-
7046	Torbay EBD	504,686	77,813	-	245,069	-	-	39,237	-	-
	Totals - Specials									
	Overall Total									

Figures taken from the submitted reports

**SCHOOL CARRY FORWARD COMPARISON BETWEEN 2013/14 CONFIRMED CARRY FORWARD
AND FORECAST CARRY FORWARD ON SBR1 AND SBR 2 RETURNS**

DfES No.	School Name	B/fwd from 13/14	SBR1 Forecast Budget Balance at end of 14/15	SBR2 Total Predicted Carry Forward at end of 13/14	Difference between 13/14 C/fwd and SBR2 Forecast (- = Increase)	Difference between SBR1 and SBR2 Forecasts (- = Increase)
2407	Furzeham Primary	65,746	9,864	22,339		(12,475)
2438	Oldway Primary	97,387	68,212	87,640		(19,428)
2439	White Rock Primary	213,736	209,200	76,820		132,380
2455	Homelands Primary	72,061	33,500	40,237		(6,737)
2460	Watcombe Primary	37,236	6,174	42,139		(35,965)
2469	Sherwell Valley	87,487	47,558	12,380		35,178
2473	Roselands	131,050	85,663	57,970		27,693
3103	Brixham C of E Primary	74,059	33,296	41,925		(8,629)
3120	Upton St James	78,994	78,994	59,898		19,096
3121	Warberry	94,742	40,420	23,371		17,049
3600	Galmpton	40,395	14,167	29,555		(15,388)
3619	Collaton St Mary	101,698	78,504	77,309		1,195
	Totals - Primary	1,094,591	705,552	571,583	0	133,969
	Secondary Schools					
4117	Westlands	650,093	731,598	700,928		30,670
4601	St Cuthbert Mayne	497,392	290,484	493,349		(202,865)
	Totals - Secondary	1,147,485	1,022,082	1,194,277	0	(172,195)
	Special Schools					
1106	Pupil referral Unit	76,083	23,734	76,040		(52,306)
7042	Mayfield	152,447	0	123,762		(123,762)
7046	Torbay EBD	82,386	45,629	38,078		7,551
	Totals - Specials	310,916	69,363	237,880	0	(168,517)
	Overall Total	2,552,992	1,796,997	2,003,740	0	(206,743)

To – Schools Forum – 4th December 2014

Fair Funding – Recommendations of the Formula and Resources Group (FAR 8) on the estimated increase in the 2015/16 Dedicated Schools Grant

Rob Parr, Principal Accountant, informed School Forum that following a review of the minimum funding levels by the EFA, Torbay's forecast DSG allocation for 2015/16 is now estimated to increase by approx £1.5m. School Forum was asked to consider the recommendation of how best to allocate this extra funding and to put forward proposals to the Director of Children's Services.

School Forum discussed possible projects that could be supported as well as Interim Tuition, SEN, Early Years and Mobility. It was agreed that a working party would be set up to look at identifying priority areas which will include a review of all the sub-formulae. Members of School Forum were invited to attend.

A group of School Business Managers and a Headteacher attended 2 meetings of the FAR 8 group. Attendees were:-

Claire Shiers – Oldway Primary
Gill Gribbins – Paignton Academy
Daneian Rees – St Cuthbert Mayne
James Evans – Torbay School and PRU
Roger Hughes – Chair of Schools Forum
Dorothy Hadleigh – Head of Service (SEND)
Debbie Horn – School Improvement & Performance Officer
Adam Tapp – Priory Academy

The recommendations were to breakdown the use of the £1.5m growth as follow:-

- £400,000 to be earmarked for the development of a new High Needs In-house Provision and Family Thrive
- £250,000 for increased number of places in Special Schools
- £60,000 for English as an Additional Language
- £40,000 for 3 and 4 year olds – increase in the hourly rate for maintained schools
- £750,000 for Schools Funding Formula – Per Pupil Entitlement
- Statement of Educational Needs – Review of the £4.20 unit of Funding

Rationale for the recommendations

1. £400,000 for High Needs In-House Provision and Family Thrive

There are at least 19 Looked After pupils with behavioural and emotional difficulties receiving residential education provision from outside of Torbay at a cost in the region of £800,000. There are a further 13 pupils placed in the Independent School sector on the grounds of their behaviour at a cost in the region of £630,000. The average cost of a placement is £45,000.

The proposal is to firstly scope what an in-house provision would look like including an analysis of the current provision and expectations of a new delivery model which would improve outcomes for these young people whilst getting better value for money.

The Family Thrive proposal builds on the original Thrive programme and would operate in conjunction with the development of the new in-house provision.

The scoping exercise is estimated to cost £30,000 and can be funded from the 2014/15 DSG underspend

2. £250,000 for increased in Special Schools Places

There are currently 420 places at an average cost of £17,000. This increase would provide in the region of 15 places depending on the type of place that is needed.

3. £60,000 for Ethnic Minority groups and English as an Additional Language

There was consensus that the £140,000 currently in the Schools Funding Formulae was too low to make a significant impact on these pupils and therefore an increase of at least 50% was seen as reasonable

4. £40,000 for 3 and 4 year olds in maintained nursery places

The nursery funding formulae distributes £1.3m using an hourly rate of £3.58 which has remained unchanged since 2010/11. The proposal is to increase this by 5% to £3.76.

5. £750,000 Schools Funding Formula – Per Pupil Entitlement

FAR 8 members debated the size and importance of each sub formulae. The most recent Early Years Foundation Scores and Key Stage 2 results were considered along with the level of pupil premium. Also considered were the number of schools who were subject to intervention and the level of deprivation funding from the sub formulae of £7m and pupil premium of £5.5m (excluding LAC pupil premium). These were considered reasonable on a total school funding resource of £76m (including pupil premium). It is worth noting that the hourly rate for independent and voluntary providers is also under review for 15/16.

The impact of Minimum Funding Guarantee (MFG) of minus 1.5%

As with previous years, schools' allocations are subject to the MFG. For 2015/16 the MFG is minus 1.5% which means that where the total allocation (excluding nursery, rates, lump sum, statementing above £6k, enhanced provision and de-delegated items) is less than the minimum funding allocation then MFG is applied to protect year on year reductions to a maximum of minus 1.5% per pupil.

Therefore when the overall funding pot is changed (increase or decrease) any school on MFG will not see the full effect. In this instance where the proposal is to increase PPE by £750,000, a number of schools whose funding allocation is on MFG i.e. the Torbay local formula is significantly below MFG, will not see any or minimal effect on their 2015/16 funding allocation. See example below:

	£	
A	Initial School Allocation as at 31 st Jan 14 (MFG)	1,575,145
	This excludes Nursery, Statementing above £6k, Enhanced Provision and De-delegation which are all outside of MFG.	
B	Minus Lump Sum and Rates	(81,085)
C	Adjusted School Allocation	1,494,060
D	Oct 13 Pupil Numbers	391
E	Funding per pupil	3,821
F	Funding per pupil -1.5%	3,764
G	Oct 14 Pupil Numbers (Oct 13 used for this illustration)	391
H	Re-determined School Allocation minus 1.5%	1,471,649
I	Plus Lump Sum and Rates	81,085
J	Minimum Funding Guarantee for 15/16	1,552,734
K	Initial School Allocation as at 31 st Jan 14 (Formula)	1,476,130
L	Additional 15/16 funding due to the estimated £1.5m increase in DSG	35,640
M	Total 15/16 Formula Allocation	1,511,770
	Actual Allocation in 15/16 (Higher of J or M)	1,552,734

Due to the fact that the EFA have brought this increase in funding to the attention of schools, there is inevitably a sense that individual school allocations will increase. The EFA have confirmed that Torbay's approach is correct. It has also been raised with the lobbying group F40 who represent the lowest funded education authorities and there is no move by the EFA to change this approach or relax MFG.

Options for Allocating £750,000

There was unanimous agreement that growth in the region of £750,000 should then be allocated on the basis of number of pupils in each school. The mechanism for this is the Per Pupil Entitlement (PPE). The options on how this funding is split between Primary and Secondary were discussed and are:-

Option 1

To adjust funding to more accurately reflect current apportionment of the 2014/15 funding formula. This has the effect of redirecting funding to the Secondary phase.

Option 2

To maintain the current apportionment between Primary and Secondary.

FAR 8 felt on balance that Option 2 was a more reasonable approach.

6. Statement of Educational Needs – Review of the £4.20 unit of funding

The Head of SEND believed that this change would be better implemented at the review stage and could be funded from within the overall High Needs envelop of funding and therefore not a call on the growth monies.

Next Steps

For the Schools Forum to add their views to these recommendations and for the Director of Children's Services to then make the final decision in time for the completion of the EFA proforma on next year's formula unit values which has a deadline of early January 2015.

Lisa Finn
Finance Manager
01803 208283