

Agenda

Herefordshire schools forum

Date: **Friday 25 October 2019**

Time: **9.30 am**

Place: **The Council Chamber - The Shire Hall, St. Peter's Square, Hereford, HR1 2HX**

Notes: Please note the time, date and venue of the meeting.

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Agenda for the Meeting of the Herefordshire schools forum

Membership

Chair

Andy Evans

Mainstream Academies

Vice-Chair

Julie Cohn

Academy Special School Representative

Sian Bailey

LA Maintained Special Schools

Christine Bryan

Academies

Pat Burbidge

Archdiocese of Cardiff

Julie Cohn

Academy Special School Representative

Steven Fisher

Academies

Edward Gwillim

16-19 Providers

Kimberly Harley

PRU management committee

Joe Hedges

Primary Governors

Martin Henton

LA Maintained Secondary Schools

Ali Jackson

Early Years Representative

Paul Jennings

Academies

Steve Kendrick

Local Authority Maintained Primary School (with Nursery)

Tim Knapp

Academies

Tracey Kneale

Local Authority Maintained Primary School

Chris Lewandowski

Trade Unions

Rose Lloyd

Early Years

Norman Moon

LA Maintained Primary Schools

Paul Deneen

Trade Unions

Julie Rees

Local Authority Maintained Primary School

Rachel Rice

Secondary Governors

Kathy Weston

Local Authority Maintained Primary School

Agenda

	Pages
1. ELECTION OF CHAIRPERSON To elect a chairperson for the ensuing year.	
2. ELECTION OF VICE-CHAIRPERSON To elect a vice-chairperson for the ensuing year.	
3. APOLOGIES FOR ABSENCE To receive apologies for absence.	
4. NAMED SUBSTITUTES (IF ANY) To receive any details of Members nominated to attend the meeting in place of a Member of the Forum.	
5. DECLARATIONS OF INTEREST To receive any declarations of interest by Members in respect of items on the agenda.	
6. MINUTES To approve the minutes of the meeting held on 21 June 2019.	5 - 8
7. ELECTION OF CHAIRPERSON OF THE BUDGET WORKING GROUP To elect a chairperson of the Budget Working Group for the ensuing year.	
8. LOCAL AND NATIONAL SCHOOL FUNDING UPDATE To seek the views of the forum on local and national school funding issues, including the recommendations of the budget working group (BWG) on the following matters: <ul style="list-style-type: none">• Herefordshire schools budget 2020/21 including schools consultation paper• Update from Department for Education (DfE) briefing on 11th December 2019• High needs budget 2020/21	9 - 52
9. FEEDBACK FROM WORKSHOP EVENT To consider feedback on the workshop event held 21 June 2019 and update forum members on actions arising.	
10. WORK PROGRAMME 2019/20 To review the work programme for 2019-20 and identify any additional items the forum wishes to consider.	53 - 54



Minutes of the meeting of Herefordshire schools forum held at The Council Chamber - The Shire Hall, St. Peter's Square, Hereford, HR1 2HX on Friday 21 June 2019 at 9.30 am

Present: **Councillor (Chairperson)**
 Mrs J Cohn (Academy Special School Representative) (Vice-chairperson)

Mrs S Bailey	LA Maintained Special Schools
Mr P Burbidge	Archdiocese of Cardiff
Mrs J Cohn	Academy Special School Representative
Mr S Fisher	Academies
Ms K Harley	PRU management committee
Mr J Hedges	Primary Governors
Mr M Henton	LA Maintained Secondary Schools
Mr T Knapp	Academies
Mr C Lewandowski	Trade Unions
Mrs R Lloyd	Early Years
Mr N Moon	LA Maintained Primary Schools
Mr P Deneen	Trade Unions
Mrs J Rees	Local Authority Maintained Primary School

In attendance: **Carole Gandy and Felicity Norman**

Officers: **Chris Baird and Malcolm Green**

32. APOLOGIES FOR ABSENCE

Apologies were received from Andy Evans, Christine Bryan, Nicki Emmet, Ed Gwillim, Sian Lines and Rachel Rice.

33. NAMED SUBSTITUTES (IF ANY)

None.

34. DECLARATIONS OF INTEREST

None

35. MINUTES

The chair of the children and young people scrutiny committee queried if information had been circulated seeking nominations for parent governors to sit on the scrutiny committee. It was confirmed that HGA had circulated information to governors but no one had yet come forward. It was noted that parent governors would now have voting rights on any issues that impact on schools such as safeguarding, rather than only on purely education items.

Members of the forum were asked to encourage parent governors to put themselves forward.

The notes of the meeting of 15 March were agreed.

36. UPDATE ON NATIONAL SCHOOLS FUNDING ISSUES

The Schools Finance Manager provided an update on national school funding issues, key points noted were:

- DfE had indicated that the outcome of the spending review was likely to be late and that any information on changes to the national funding formula were unlikely to be known until December;
- The advice was to carry on with current arrangements for 2020/21;
- Some local authorities had historic spending commitments which the DfE were looking to phase out and would then distribute this funding via a formula, Herefordshire had no such historic spending commitments and could benefit if and when this was put in place;
- There had been no news about funding of future pay awards and pension increases, the DfE had committed to fully fund minus 1% for the 2018/19 pay award but nothing further.

With the guidance from the DfE in mind, the consultation paper for Herefordshire schools budgets for 2020/21 would be based on carrying forward the 2019/20 arrangements. The approach would be updated if further information came forward.

The SFM updated forum members on the work of the Budget Working Group since the previous meeting as follows:

- The DSG outturn for 2018/19 showed a £531k underspend at the end of the year, largely due to the additional government grant of £380k for high needs which was not planned in spending commitments; if that grant had not been received there would have been a £66k overspend in the high needs block and a smaller underspend overall;
- With the surplus from 2018/19 added, reserves stood at £2.5m of which £0.8m was committed to support early years projects;
- De-delegation arrangements for local authority schools had been reviewed as requested and the working group was broadly content with the current arrangements, there was likely to be a small reduction in cost per pupil of the trade union de-delegation to better reflect recent actual costs;
- The budget consultation for 2020/21 would include the de-delegation arrangements as it did every year and would reflect the feedback from the working group, all schools would be able to give their views through the consultation;
- The chair of the working group stated that there had been a long discussion on the current de-delegation arrangements and that overall the group felt the position was fair and that local authority schools were not losing out;
- A draft scheme was being drawn up by the SFM for allocation of the growth pot funds, this would be included in the consultation paper in the autumn for schools to give their views;
- Latest forecasts showed the high needs block should remain in surplus through to March 2022 on the assumption that additional funding from the DfE was continued and that modest transfers from the school block growth pot were approved.

The SFM reported on an exercise to compare Herefordshire's current DSG position with that of statistical neighbours. The review was based on unaudited published accounts but showed that a number of councils in the group had significant deficits while other councils had provided additional funding to prevent deficits. It was concerning how quickly some councils had moved from a surplus to a deficit and this emphasised the need for careful and continuous monitoring of the schools budget. Where councils were

in deficit by more than 1% they would be required to submit a recovery plan to the DfE. The SFM would review such plans to understand the causes of these deficits and what lessons Herefordshire could take forward.

37. ANNUAL REVIEW OF SCHOOLS FORUM MEMBERSHIP

The clerk to the forum summarised the report on the annual review of membership. Key points were noted as:

- The forum was required to review membership on a regular basis to ensure that representation by schools members broadly reflects the proportion of pupils in academies and local authority maintained schools;
- Analysis of the 2019 January School Census showed no significant change in proportionality and as a result no changes were proposed to the allocation of seats on the forum;
- The membership of the Budget Working Group was not required to be proportional but the forum had previously decided that the working group would follow the same principles as the forum, no changes were proposed to the membership of the working group.

The clerk highlighted that there were five vacant seats for primary headteacher representatives. Information would be circulated at the start of the autumn term to all primary schools seeking to recruit additional representatives. The clerk requested that forum members encourage colleagues to consider putting themselves forward. There were two academy seats and three local authority seats. The clerk reminded members that deputy or assistant headteachers or finance managers could also serve on the forum but it was appreciated that primary schools may find it difficult to release staff for forum meetings.

It was decided that:

The outcome of the annual review of proportionality be noted and no changes be made to allocations of seats on Herefordshire Schools Forum or the Budget Working Group.

38. DATES OF FUTURE MEETINGS AND WORK PROGRAMME

The dates of meetings for 2019/20 academic year were noted as:

25 October 2019
17 January 2020
13 March 2020
10 July 2020

The draft work programme was noted as containing the standard regular items. The programme would be kept under review and amended as necessary during the year.

The meeting ended at 9.57 am

Chairperson



Meeting:	Herefordshire schools forum
Meeting date:	Friday 25 October 2019
Title of report:	Local and National School Funding update 2020/21
Report by:	Director of Children and Families

Classification

Open

Decision type

This is not an executive decision

Wards affected

(All Wards);

Purpose and summary

To seek the views of the forum on local and national school funding issues, including the recommendations of the budget working group (BWG) on the following matters:

- Herefordshire schools budget 2020/21 including schools consultation paper
- Update from Department for Education (DfE) briefing on 11th December 2019
- High needs budget 2020/21

Recommendation(s)

That:

- Schools Forum consider the initial budget proposals for 2020/21 for schools and high needs and provide feedback to inform the council's annual budget consultation with schools.**

Alternative options

1. Alternative options will be fully considered by the BWG prior to the BWG formulating final budget recommendations for consideration by Schools Forum in January 2020. At this stage only a preliminary view has been sought in order to determine how the budget proposals can be developed further. The high needs budget requires further detailed work following the expected DfE funding announcement in mid-December 2019 and recommendations will be agreed by School Forum in March 2020 prior to a formal decision by the Cabinet member for Children's and Families.

Key considerations

2. The Secretary of State for Education announced increased funding for schools on 3rd September and the council is pleased that the government has finally recognised that schools have been underfunded for too long and is injecting much-needed cash into our primary and secondary education during the next three years. The additional funding announced for high needs will be particularly important in making sure that the available provision in Herefordshire continues to meet the needs of all our pupils. We must await the full details of the settlement, which will follow in December 2019, however the summary below provides a brief overview of the settlement.
3. The education funding announcement aims to ensure every child receives a superb education – regardless of which school or college they attend, or where they grow up. The Government's Spending Round exceptionally sets budgets for schools for three years until 2022-23 and confirms:
 - the government's commitment to a £7.1 billion increase in funding for schools by 2022-23 (£4.6 billion above inflation), compared to 2019-20 funding levels. Ahead of that, the schools budget will rise by £2.6 billion in 2020-21 and £4.8 billion in 2021-22 and £7.1 billion in 2022-23, compared to 2019-20 funding levels
 - Separate to this, each year the government will provide almost £1.5 billion of funding to compensate schools for the increased cost of employer pensions contributions (£0.9 billion in 2019/20 to reflect the 7/12th part year from September 2019).
 - in 2020-21, the government will ensure that per pupil funding for all schools can rise in line with inflation (1.8 per cent). The minimum per pupil amount for 2020-21 will increase to £3,750 for primary schools and £5,000 for secondary schools, with the primary schools minimum then rising to £4,000 in 2021-22 in line with the government's commitment;
 - For schools already on their National Funding Formula allocation, the per-pupil values in the formula will increase by at least 4 per cent in nominal terms in 2020-21.
 - the additional high needs funding includes over £700 million more in 2020-21 compared to 2019-20 funding levels to support children and young people with special educational needs to ensure all receive a high-quality education and reach their potential; and
 - £400 million in 2020-21 for Further Education, recognising the vital role of this sector in delivering the skills needed in the UK.
 - The government will also increase early years spending by £66 million to increase the hourly rate paid to childcare providers through the government's free hours offers.
4. The Department for Education settlement, taking into account the schools, Further Education and early years funding, represents a 3.3 per cent increase in real terms to the overall resource budget from 2019-20 to 2020-21.

DRAFT SCHOOL BUDGET CONSULTATION PAPER

5. The draft consultation paper sets out the proposed schools budget strategy for 2020/21 as follows:
- Pass through to schools the funding increase as announced by government and ensure that schools receive their full entitlement as determined by the national funding formula
 - If additional funding is received in the schools block from the national growth fund then this extra funding should be allocated firstly to meet agreed basic need expansion of schools and secondly the balance shared in three parts to
 - Enhance the national funding formula allocation to schools;
 - Fund through the high needs block the Special Education Needs (SEN) protection scheme for those schools that admit higher than average numbers of pupils in receipt of high needs top-up payments; and
 - Extend the current SEN protection scheme to high schools to ensure that all schools receive additional funding as necessary.
 - Last year, 2019/20, £0.3m was received in additional growth funding.
6. The draft schools consultation paper is attached as Appendix 1 and provides greater detail of the funding support necessary from schools to continue the SEN protection scheme and the proposals for use of the growth fund. The response form is attached as Appendix 2.

HIGH NEEDS BLOCK STRATEGY 2020/21

7. DfE have confirmed indicative allocations for Herefordshire's share of the additional national high needs funding will be £2.0m. It is forecast that the high needs block faces £1.0m of cost pressures in 2020/21 arising from additional pupils with complex high needs who will potentially require out of county placements. Additionally it is proposed to provide at least an inflation increase for high needs tariffs for all schools and to revise the high needs tariff matrix to take greater account of medical needs, mostly tariffs D-F and to extend the current primary high needs protection scheme to high schools.
8. Initial proposals, subject to the final DSG settlement in December 2019, for the high needs budget for 2020/21 are
- | | |
|--|--------|
| • Over existing high needs overspends in 2019/20 | £1.0m |
| • Potential growth in complex needs places | £0.5m |
| • Growth in post-16 places | £0.05m |
| • Increases in tariffs A-C (2%) D-F(5%) | £0.25m |
| • Additional costs from tariff review | £0.2m |
| • Extend the SEN protection scheme to high schools | £0.1m |
| • Initiatives to reduce future expenditure | £0.1m |
|
 | |
| • Total additional high needs expenditure 2020/21 | £2.2m |
|
 | |
| • Less £0.2m contribution from schools block | -£0.2m |
|
 | |
| • Indicative extra high needs funding announced by DfE | £2.0m |

9. Projections for the complex needs budget for 20/21 suggest that if six identified pupils require funding then a further £0.5m will be required. In which case it will only be possible to fund the extension of the SEN protection scheme to secondary schools and to continue the current scheme for primary schools by transferring £0.2m (i.e. £0.1m each for both primary and secondary schools) from the national growth fund within the schools block. Please note that all schools will continue to be funded at least at the national funding formula.
10. Further detailed work will be undertaken with the Budget Working Group when high needs funding is confirmed by the DfE in December 2019 and prior to final high needs budget plans being agreed in March 2020.

DfE schools funding briefing 11th October

11. The DfE briefing coincided with the publication of full details of the national funding formula for schools and high needs and indicative DSG funding allocations for 2020/21- see appendix 3 for full details. Key points are set out as follows:
 - The schools block will receive an increase of 3.81% which is much higher than the government's 1.84% inflation guide
 - The implementation of the minimum per pupil funding level of £3,750 for primary schools and £5,000 for secondary schools will provide £421k shared by six primary schools and £572k shared by six secondary schools. This will provide significant budget increases for Herefordshire's most poorly funded schools.
 - The increase in the primary minimum per pupil funding level to £4,000 will give another significant boost to those primary schools.
 - A new and more robust pupil mobility factor has been included in the national funding formula. The mobility factor will allocate funding for schools whose proportion of mobile pupils in each phase is above a threshold of 6%. Mobility funding will be based on £875 per primary pupil and £1,250 per secondary pupil above the 6% threshold. The previous mobility formula had a threshold of 10% and wasn't fit for purpose. Subject to consultation with schools, it is proposed to adopt the new mobility factor as it is now an integral part of the national formula.
 - Provisional allocations for the high needs block indicate that Herefordshire will receive an additional £2m as our share of the national £780m. This should be sufficient to be able to consider setting a balanced budget for high needs for 2020/21.
 - DfE have confirmed that there will be an increase in the hourly rate paid to local authorities for early years however it is yet to be announced.

Timescales for budget approval

12. October 25th – Schools Forum agree budget consultation with schools w/c 4th November
December 2nd – Consultation finishes and BWG consider responses on 6th December
December 17th – Dedicated Schools Grant allocations announced by government
January 10th – BWG makes budget recommendations to Schools Forum

January 17th – Schools Forum considers and makes final recommendations to Cabinet Member

January 21st – Submit final schools budget to Education and Skills Funding Agency

January 31st – Cabinet Member decision

February 28th – BWG consider high needs budget proposals

March 13th – Schools Forum make high needs budget recommendations to cabinet member

March 31st – Cabinet Member decision

Community impact

13. Increasingly school and high needs funding is directed by government and the council can only allocate funding given by government. School governing bodies retain the responsibility to spend the school budget on meeting pupil needs. Schools, colleges and post-16 provider and potentially parents will need to be consulted on any changes to the high needs services.

Equality duty

14. Under section 149 of the Equality Act 2010, the ‘general duty’ on public authorities is set out as follows:

A public authority must, in the exercise of its functions, have due regard to the need to -

- (a) eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act;
 - (b) advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;
 - (c) foster good relations between persons who share a relevant protected characteristic and persons who do not share it.
15. The public sector equality duty (specific duty) requires us to consider how we can positively contribute to the advancement of equality and good relations, and demonstrate that we are paying ‘due regard’ in our decision making in the design of policies and in the delivery of services. In relation to school finance it is the responsibility of individual governing bodies to commit expenditure according to individual pupil need. Changes in high needs provision will require consultation with users and further advice from legal services will be sought should this be necessary. However the decisions of the school forum should have regard to this duty and the potential implications of any decisions made.

Resource implications

16. The schools budget is fully funded by Dedicated Schools Grant (DSG). At this stage the financial assessment is indicative only pending the final DSG announcement by government in mid-December 2019.
17. Forecast cost pressures on the high needs block indicate that cost reductions will be necessary unless the DSG settlement provides at least £2.0m additional funding in the high

needs block. Provisional high needs block allocations issued by the DfE on 11th October 2019 indicate a settlement circa £2m extra however this remains subject to high needs place commissioning. This is equivalent to an additional 13%. Government have indicated that the additional £780m provided nationally for high needs will provide for increases between 8% and 17% for individual authorities.

Legal implications

18. The Schools Forum is a decision making and consultative body in relation to matters concerning schools' budgets as defined in the School and Early Years Finance Regulations (2018) and the School Forums (England) Regulations 2010
19. The School and Early Years Finance (England) Regulations 2018 determine those matters on which the council must or may consult Schools Forum and those in respect of which the Schools Forum can make decisions. These Regulations make provision for the financial arrangements of councils in relations to the funding of schools.
20. This report complies with the legal requirements in this regard.

Risk management

21. As the budget proposals are only indicative at this stage, the full risk analysis has not yet been undertaken.

Consultees

22. No consultation has yet been undertaken with schools, early years providers or service users as there are currently no fully developed proposals suitable for consultation. Consultation with schools on the schools budget will follow after half term.
23. The BWG was consulted 4th October 2019 regarding the schools budget consultation and expressed some concern about repeated transfers from the schools block as originally it was supposed to be a one-off. BWG agreed that more choices should be added to the consultation paper around the high needs block. BWG agreed that the Schools Forum should consider the draft consultation paper at their next meeting on 25th October, before distribution to schools.

Appendices

Appendix 1 – Draft school budget consultation

Appendix 2 – Budget consultation response form

Appendix 3 – the national funding formulae for schools and high needs 2020-21

Background papers

None

NATIONAL SCHOOL FUNDING FORMULA 2020/21

CONSULTATION FOR HEREFORDSHIRE SCHOOLS

1.0 SUMMARY

- 1.1 This consultation paper sets out the expected financial position for Herefordshire school budgets for 2020/21. The school funding proposal is to continue to implement the national funding values as set by government and to pass through to all schools the additional funding as announced in September 2019. The minimum per pupil funding levels will increase to £3,750 for primary schools (rising to £4,000 in 2021/22) and £5,000 for secondary schools, while the remaining national funding factors will be increased consistently by 4%. Exceptions to this will be that the free school meals factor, will be increased by inflation as it is intended to broadly reflect actual costs, and premises funding will continue to be allocated at a county level on the basis of actual spend. There will be an inflation increase for the Private Finance Initiative (PFI) factor. The minimum funding guarantee (MFG) will be set between +0.5% and + 1.84%. Subject to affordability, Herefordshire will set the MFG at 1.84% to ensure that all schools receive an inflationary increase on their budget.
- 1.2 In previous years, Herefordshire has strictly adhered to the DfE's funding block allocations as this practice has served Herefordshire well since 2013 when individual blocks were first published by DfE. Herefordshire is one of the few shire counties nationally not to have a high needs deficit. However in view of the continued pressures on the complex needs budget, it is proposed to use the funding associated with the national growth fund to ensure that primary and secondary schools with higher than average numbers of high needs pupils, receive additional funding to help meet the school threshold cost of £6,000 per pupil. It will only be possible to continue this level of support for schools with high needs pupils with additional funding from the national growth fund. Schools will continue to be funded at the national funding formula and, depending on sufficient funding being available, possibly more.
- 1.3 Nationally, additional high needs funding of £780m has been announced and Herefordshire's indicative allocation is £2.0m extra although this will not be confirmed until mid-December 2019. Further work will be necessary to finalise the high needs budget should the final allocation of high needs funding be insufficient. Proposals are included to fund additional high needs cost pressures of £1.5m in 2020/21, mostly current overspends £1.0m and a potential further growth of £0.5m in independent school placements for those pupils with the most complex needs.
- 1.4 Herefordshire is also expected to receive approx. £0.3m from a formulaic share of national growth funding. No new schools require basic need growth funding so it is proposed to allocate the growth funding to support high needs in schools and to give all schools extra funding via the national funding formula. Schools are being consulted now on how the growth fund should be used so that if, in future should basic need be identified that requires growth funding, the criteria for use of the growth are already agreed.

3.0 HIGH NEEDS BLOCK STRATEGY 2020/21

3.1 Herefordshire's share of the additional national high needs funding is expected to be £2.0m. It is forecast that the high needs block faces £1.0m of cost pressures in 2020/21 and up to a further £0.5m for additional pupils with complex high needs who will potentially require out of county placements. Additionally, it is proposed to provide at least an inflation increase for high needs tariffs for all schools and to revise the high needs tariff matrix to take greater account of medical needs, mostly tariffs D-F and to extend the current primary high needs protection scheme to high schools.

3.2 Initial proposals, subject to confirmed available funding from DfE, for the high needs budget for 2020/21 are:

• Existing high needs overspends in 2019/20	£1.0m
• Potential growth in complex needs places	£0.5m
• Growth in post-16 places	£0.05m
• Increases in tariffs A-C (2%) D-F(5%)	£0.25m
• Additional costs from tariff review	£0.2m
• Extend the SEN protection scheme to high schools	£0.1m
• Preventative initiatives to reduce future spend	£0.1m
• Total additional high needs expenditure 2020/21	£2.2m
• Less £0.2m contribution from growth fund - schools block	-£0.2m
• Indicative high needs block funding for 2020/21	£2.0m

3.3 Projections for the complex needs budget for 2020/21 suggest that potentially six additional pupils will require funding at a cost of up to £0.5m and that these costs are likely to continue and increase in 2021/22. It will only be possible to fund the extension of the SEN protection scheme to secondary schools and to continue the current scheme for primary schools by transferring £0.2m (i.e. £0.1m each for both primary and secondary schools) to the high needs block from the national growth fund (within the schools block). It is important to note that all schools will continue to be funded at the national funding formula.

3.4 Further detailed work will be undertaken with the Budget Working Group when high needs funding is confirmed by the DfE in December 2019, and prior to final high needs budget plans being agreed in March 2020.

4.0 EARLY YEARS BLOCK

4.1 An inflationary increase of 1.8% in early years funding was implicit in the September school funding announcement and subject to the increase being confirmed in the DSG December funding announcement, it is proposed to add an additional 1.8% to the hourly rate, deprivation rate and the rurality lump sum to ensure that the early years funding formula increases in line with inflation.

5.0 CENTRAL SCHOOL SERVICES BLOCK

5.1 In addition to the statutory retained duties, formerly funded by Education Services Grant (£345k), the central schools block was used in 2019/20 to fund Schools Forum administration costs (£12k), school admission costs (£142k), national licence costs (£133k) and a transfer to high needs (£56k). It is proposed to reduce the DSG allocated to admissions by a further £10k given the service underspends each year and to use this to increase the amount transferred to high needs to £66k.

6.0 NATIONAL FUNDING FORMULA – HEREFORDSHIRE PROPOSALS

6.1 Herefordshire will increase the national funding formula values by 4% from the 2019/20 financial year. Please note the 2019/20 values were £15 per pupil greater than the national funding formula. As in previous years, school budgets can only be fully finalised after the October pupil census and confirmation by the DfE of the financial settlement in December. To aid school budget planning, we are committed to maintaining the formula values as published in this consultation paper and changes will be made only if absolutely necessary.

6.2 Herefordshire's school funding proposals for 2020/21 are the national funding formula values supplemented by a 4% increase in baseline funding (compared with 2019/20) as follows:

a) Basic Entitlement per pupil (2019/20 factor values for comparison):

- i. Primary KS1/2 - £2,857 (£2,747)
- ii. Secondary KS3 - £4,018 (£3,863)
- iii. Secondary KS4 - £4,561 (£4,386)

b) Low prior attainment (low cost, high incidence special education needs)

- i. Primary funding per pupil - £1,063 (£1,022)
- ii. Secondary funding per pupil - £1,612 (£1,550)

c) Deprivation per Free Meal pupil

- i. Primary - £450 (£440)
- ii. Secondary - £450 (£440)

d) Deprivation per Ever-6 Free Meal pupil

- i. Primary - £560 (£540)
- ii. Secondary - £815 (£785)

- e) Socio-economic deprivation Income Deprivation Affecting Children Index (IDACI)
- Band A (3% of pupils) - primary £600 (£575) secondary £840 (£810)
 - Band B (8% of pupils) - primary £435 (£420) secondary £625 (£600)
 - Band C (7% of pupils) - primary £405 (£390) secondary £580 (£560)
 - Band D (8% of pupils) - primary £375 (£360) secondary £535 (£515)
 - Band E (9% of pupils) - primary £250 (£240) secondary £405 (£390)
 - Band F (10% of pupils) - primary £210 (£200) secondary £300 (£290)
 - Band G (55% of pupils) - primary £0 secondary £0
- f) English as Additional Language (EAL) for all eligible pupils
- i. Primary - £535 (£515)
 - ii. Secondary - £1,440 (£1,385)
- g) Lump sums
- i. Primary £114,400
 - ii. Secondary £114,400
- h) Sparsity
- i. Tapered lump sum of £26,000 (£25,000) for qualifying primary schools with an average year group size of 21.4
 - ii. Tapered lump sum of £67,600 (£65,000) for qualifying secondary schools with an average year group size of 120 pupil
- i) Business Rates – no change, funded at cost with an estimated 2.0% CPI inflation increase.
- j) Looked After Children – £0 as funding has been transferred to the pupil premium grant
- k) Mobility – implement new NFF factor pupil values above 6% mobility threshold
- £875 per primary pupil
 - £1,250 per secondary pupil
- l) Exceptional premises factor – increased by 1.84% inflation to £8,923 (£8,763.50) to meet rent costs for Eastnor Primary School
- m) PFI factor – increased by 3.03% RPI(X) to £295,515 (£286,824) in accordance with the retail prices index used by the DfE in the national formula.
- n) Secondary schools have been guaranteed a minimum of £5,000 per pupil and primary schools a guaranteed minimum of £3,750 by April 2020 and £4,000 from April 2021.

- 6.3 De-delegation proposals for locally maintained schools - it is proposed that the de-delegation charge for trade union facilities for primary schools is reduced by 15p to £2.75 per pupil. Secondary schools will be asked to confirm the current no de-delegation for TU facilities.
- 6.4 The education management deduction will reduce by £1 to £12.50 per pupil for local authority maintained schools.

7.0 GROWTH FUND PROPOSALS

7.1 In 2019/20 Herefordshire received a formulaic share (£0.3m) of the national growth fund and this is expected to continue in future. The criteria for allocating growth funding to schools must be approved in advance in case basic need growth is required from September 2020. The growth fund can only be used to:

- support growth in pre-16 pupil numbers to meet basic need
- support additional classes needed to meet the infant class size regulation
- meet the costs of new schools

7.2 Local authorities are responsible for funding these growth needs for all schools in their area, for new and existing maintained schools and academies. Local authorities should fund all schools on the same criteria, discussed below. Where growth occurs in academies that are funded by ESFA on estimates, ESFA will use the pupil number adjustment process to ensure the academy is only funded for the growth once.

7.3 The costs of new schools will include the lead-in costs, for example to fund the appointment of staff and the purchase of any goods or services necessary in order to admit pupils. They will also include post start-up and diseconomy of scale costs. These pre and post start-up costs should be provided for academies where they are created to meet basic need.

7.4 The schools forum must also be consulted on the total size of the growth fund from each phase, and should receive regular updates on the use of the funding.

7.5 A copy of the proposed growth fund criteria are attached as an appendix and schools are invited to comment on the proposals.

8.0 TIMESCALES

8.1 The budget process and expected timeline is:

- Consultation closes 12 noon 2nd December 2019
- There is no requirement this year for the submission of an interim budget to the EFA in October
- Schools Forum meets on 17th January 2020 to consider the recommended funding values to be submitted to the Education Funding Agency

- Budgets issued to locally maintained schools by 28th February 2020
- Education Funding Agency to issue budgets to academies for academic year 2020/21.

9.0 CONSULTATION RESPONSES BY 2ND December 2019

- 9.1 A separate consultation form is attached and must be returned to School.funding@herefordshire.gov.uk by 12 noon on 2nd December 2019 in order that your views can be considered by the Budget Working Group on 6th December 2019 and Schools Forum at their meeting on 17th January 2020.
- 9.2 Please respond to this consultation as all views are important and do contribute towards the budget decision which aims to achieve the best possible schools budget for Herefordshire within the funding allocated by government.

10.0 FURTHER INFORMATION

- 10.1 If you have any questions regarding the detailed content of this consultation paper or the calculations and comparisons for your school as set out in the appendices, please contact either Malcolm Green, Schools Finance Manager (malcolm.green@herefordshire.gov.uk) or any member of the Budget Working Group as follows;

Primary

Mr S Kendrick, Ashfield Park
Mrs K Weston, Trinity
Mr P Box, Lord Scudamore
Mr M Maund, Almeley
Mrs H Webb, Colwall

Secondary

Mr P Jennings, Lady Hawkins (Chairman)
Mr S Fisher, Kingstone
Mrs C Bryan, John Kyrle
Mrs N Emmett, Fairfield
Mrs A MacArthur, Wigmore High
Mr S Robertson, Aylestone

- 10.2 Others contributing to the development of these budget proposals included Mrs S Williams, Barrs Court representing special schools and Mrs R Lloyd and Mrs A Jackson representing early years.

Criteria for Additional Funding for New Schools and Planned Growth in Primary and Secondary Schools.

Draft for consultation with schools Autumn 2019

Growth Criteria

Growth funding will be provided to mainstream maintained schools and academies where:

1. The Council agree that a temporary or permanent increase to a school's PAN is required to meet **basic need population growth** (not simply arising from parental preference or a school's desire to increase capacity). This would normally be to accommodate an additional reception class.
2. The Council agree that a temporary increase to a school's PAN is required to accommodate in year admissions across a number of year groups resulting from **basic need expansion increases in an area** (not simply arising from parental preference or a school's desire to increase capacity).
3. The Council requests schools to admit significant additional pupils **as a consequence of a school closure**.
4. In-year **support to a new school** from the growth fund is required in line with section 3 of the New School Funding Criteria below.

The agreed increase will normally be in the form of an additional class or half class.

Where an additional class is needed in an area but agreement cannot be reached to fund one school, the funding may be split between two or more schools.

Growth Funding Payments

One off funding will be allocated based on 30 pupils (or 15 if a half class) X the age weighted pupil unit (AWPU) X 7/12ths. (note: for an academy a full AY funding is paid subject to the LA being able to reclaim this 5/12ths from the EFA)

This additional funding will be taken into account when subsequently calculating any payments that may be due to a maintained school to ensure no double funding arises.

If a school or academy feels that the funding mentioned above will significantly underfund their additional costs, they will be given an opportunity to bring a request for additional funding to the Schools Forum for consideration. Any such request must be backed with clear demonstrated evidence of the additional funding need.

Where growth funding is payable to academies, the Council will also pay the increase for the remaining 5/12ths of the academic year (April to August). The Council's Dedicated Schools Grant (DSG) will however be reimbursed for this 5/12ths element by the Education Funding Agency (EFA.)

Rules on growth funding payments to a new school are covered under section 3 of the New School Funding Criteria below.

New School Funding Criteria

1. Start up costs prior to a school opening

A one off lump sum of £50,000 will be payable to the primary school from the growth fund. A new secondary school will receive a lump sum of £75,000.

This is intended to be used towards costs such as:

- Funding salary costs of the designated head teacher, admin and finance support prior to opening.
- Any temporary accommodation costs while awaiting new build.
- Recruitment and interview related costs.
- Any other incidental costs.

It will up to the school how to use these funds. No further one off funding prior to opening will be payable and any unspent funds can be retained by the school.

2. Varying the pupil numbers used in the Authorities Proforma Tool (APT) submission to the DfE.

When a new school opens and for a period of 7 years or when a school reaches 90% of its NOR capacity whichever is the sooner, the LA will apply to the EFA to vary the pupil number on roll (NOR) in the APT (the APT NOR is used as the basis for schools' budgets).

The varied NOR will (subject to EFA approval) be used in the APT instead of the previous October census NOR that is used for all other schools.

Funding for a new school in the first instance will be based upon 120 pupils (a minimum four class model).

Varied pupil numbers will be calculated based on a maximum of 30 pupils per class and by keeping Infant and Junior phases as distinct teaching groups.

E.g. for a new 2FE primary school

Funding will be based upon 120 pupils (a minimum four class model) in the first instance.

Initial assumption:

- | | | |
|--|---|--------------------------|
| <ul style="list-style-type: none"> • Reception Class of up to 30 pupils • KS1 class of up to 30 pupils | } | Infant total – 60 pupils |
| <ul style="list-style-type: none"> • KS2 2 classes of up to 30 pupils | | Junior total – 60 pupils |

Triggers for additional funding:

As soon as the infant numbers (Reception plus KS1) reach 60 pupils, the LA will fund another 30 Reception places (3 classes). Then

- on reaching 90 the LA will fund another 30 places (4 classes)
- on reaching 120 the LA will fund another 30 places (5 classes)
- on reaching 150 the LA will fund another 30 places, taking them to six infant classes.

AND/OR

As soon as KS2 total pupil numbers reach 60, the LA will fund another 30 places.

- on reaching 90 the LA will fund another 30 places
- on reaching 120 the LA will fund another 30 places
- on reaching 150 the LA will fund another 30 places
- on reaching 180 the LA will fund another 30 places
- on reaching 210 the LA will fund another 30 places, taking them to eight KS2 classes.

Funding will not be clawed back if the actual pupil numbers at year end are lower than the estimated varied number used in the APT.

Other funding factors

If data is provided by the DfE relating to other funding factors (e.g. prior attainment, deprivation) as a percentage of the actual NOR then these percentages will be applied to the varied NOR to identify appropriate funding for the other factors.

If data is not available the other factor percentages of a similar school will be used, or in the case of there being no similar school the average percentages for the whole sector.

3. In-year support to new schools from the growth fund.

The following will apply for a period of 7 years, or when a school reaches 90% of it's NOR capacity, whichever is the sooner.

3.1 Funding for new class required.

If at any point during the financial year the LA identifies an additional reception class is required above those already used in the varied NOR then the school will receive an additional full year's funding of 30 pupils X the AWPU. This will in effect be a correction to the estimated NOR used in the APT submission.

3.2 New class not required but in-year October census NOR higher than varied NOR used in APT.

The school's in year October census will be compared to the varied NOR used in the APT plus any additional NOR added for a new class in year.

If the October NOR is higher than this, AWPU funding will be provided for the increase without applying any thresholds. This will ensure that if a school does not qualify for additional class funding it will as a minimum be funded for all its pupils at the mid financial year October census date.

NATIONAL SCHOOL FUNDING FORMULA 2020/21

CONSULTATION RESPONSE FORM



The budget response form must be returned by:
12noon on 2nd December 2019 to:
School.funding@herefordshire.gov.uk

Q1: SCHOOL FUNDING VALUES 2020/21 Options for use of any surplus funding after implementing the national formula values	Yes	No
a) It is proposed to implement the national funding formula values in 2020/21 and to allocate the estimated £0.3m share of the national growth fund jointly to the high needs block for primary and secondary schools and basic need.	<input type="checkbox"/>	<input type="checkbox"/>
b) It is proposed to include the new mobility factor within the national funding formula for 2020/21	<input type="checkbox"/>	<input type="checkbox"/>
c) Share the national growth fund (within the schools block) £0.3m as follows:		
i) Transfer £0.1m from the schools block to fund the primary SEN protection scheme expenditure in 2020/21	<input type="checkbox"/>	<input type="checkbox"/>
ii) Transfer £0.1m from the schools block to fund the secondary SEN protection scheme expenditure in 2020/21	<input type="checkbox"/>	<input type="checkbox"/>
iii) Retain £0.1m in the growth fund to meet basic need expansion	<input type="checkbox"/>	<input type="checkbox"/>
d) Do you accept that without support from the schools block growth fund then the SEN protection scheme for schools with higher than average numbers of high needs pupils must be curtailed.	<input type="checkbox"/>	<input type="checkbox"/>

Additional Comments

Q2: HIGH NEEDS BLOCK	Yes	No																																								
<p>It is estimated that Herefordshire will receive at least an additional £2.0m grant for high needs. It is forecast that the high needs block faces £1.0m of cost pressures in 2020/21 arising from additional pupils with complex high needs who will potentially require out of county placements.</p> <p>Additionally, it is proposed to provide at least an inflation increase for high needs tariffs for all schools and to revise the high needs tariff matrix to take greater account of medical needs (mostly tariffs D-F) and to extend the current primary high needs protection scheme to high schools.</p>																																										
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">a) Cover existing overspends in high needs</td> <td style="width: 20%; text-align: right;">£1.0m</td> <td style="width: 10%; text-align: center;"><input type="checkbox"/></td> <td style="width: 10%; text-align: center;"><input type="checkbox"/></td> <td style="width: 10%;"></td> </tr> <tr> <td>b) Growth in complex needs places</td> <td style="text-align: right;">£0.5m</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td></td> </tr> <tr> <td>c) Growth in post-16 places</td> <td style="text-align: right;">£0.05m</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td></td> </tr> <tr> <td>d) Increases in tariffs A-C (+2%) and D-F (+5%)</td> <td style="text-align: right;">£0.25m</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td></td> </tr> <tr> <td>e) Additional costs from tariff review</td> <td style="text-align: right;">£0.2m</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td></td> </tr> <tr> <td>f) Extend the SEN protection scheme to high schools</td> <td style="text-align: right;">£0.1m</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td></td> </tr> <tr> <td>g) Preventative initiatives to reduce future spend</td> <td style="text-align: right;">£0.1m</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td></td> </tr> <tr> <td>h) Less contribution from growth fund schools block</td> <td style="text-align: right;">-£0.2m</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td></td> </tr> </table>	a) Cover existing overspends in high needs	£1.0m	<input type="checkbox"/>	<input type="checkbox"/>		b) Growth in complex needs places	£0.5m	<input type="checkbox"/>	<input type="checkbox"/>		c) Growth in post-16 places	£0.05m	<input type="checkbox"/>	<input type="checkbox"/>		d) Increases in tariffs A-C (+2%) and D-F (+5%)	£0.25m	<input type="checkbox"/>	<input type="checkbox"/>		e) Additional costs from tariff review	£0.2m	<input type="checkbox"/>	<input type="checkbox"/>		f) Extend the SEN protection scheme to high schools	£0.1m	<input type="checkbox"/>	<input type="checkbox"/>		g) Preventative initiatives to reduce future spend	£0.1m	<input type="checkbox"/>	<input type="checkbox"/>		h) Less contribution from growth fund schools block	-£0.2m	<input type="checkbox"/>	<input type="checkbox"/>			
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Additional Comments

Q3: DE-DELEGATION & EDUCATION MANAGEMENT	Yes	No
<p>As in previous years, it is proposed that the following services should be de-delegated for local authority maintained schools:</p> <ul style="list-style-type: none">a) trade union facilities - primary only – de-delegated at a reduced cost of £2.75 per primary pupilb) ethnic minority support – secondary and primary Charged at £1.12 per pupil, £6.60 per Ever-6 FSM pupil and £107 per EAL first year pupil.c) school budgeting software licence estimated at £400 per schoold) it is proposed to reduce the charge to £12.50 per pupil i.e. a £1 per pupil reduction for the statutory education services provided by the council to non-academy schools.e) trade union facilities – secondary only – no budgets to be de-delegated in line with previous financial years. <p><i>Please answer individually for each service.</i></p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Additional Comments

Q4: EARLY YEARS FUNDING FORMULA	Yes	No
<p>The government have announced an inflation increase for early years, should this be confirmed in the Dedicated Schools Grant announcement then all the values in the current early years funding formula will be increased by the expected 1.8% inflation for the new financial year from April 2020:</p> <p>Do you support an inflation increase for the early years funding formula from April 2020</p>	<input type="checkbox"/>	<input type="checkbox"/>
Additional Comments		
Q5: GROWTH FUND CRITERIA	Yes	No
<p>In 2019/20 Herefordshire received a formulaic share (£0.3m) of the national growth fund and this is expected to continue in future. It is sensible forward planning to ensure that the criteria for allocating growth funding to schools are approved in advance of particular cases arising. The growth fund can only be used to:</p> <ul style="list-style-type: none"> • support growth in pre-16 pupil numbers to meet basic need • support additional classes needed to meet the infant class size regulation • meet the costs of new schools <p>Do you support the criteria set out in the consultation document as the basis for allocating growth funding to qualifying schools?</p>	<input type="checkbox"/>	<input type="checkbox"/>
Additional Comments		

Name

School

Signed

Date.....

Please return to school.funding@herefordshire.gov.uk by
12 noon on 2nd December 2019.



Department
for Education

The national funding formulae for schools and high needs

2020-21

October 2019

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Background

1. A great education is fundamental to the success of children, their families and our communities, as well as the success of our country. We want young people to have access to a world-class education system which will give them the best possible opportunities, whatever direction they choose to take.
2. The increase in funding that we announced at the end of August will help to make this a reality. Funding for schools and high needs will rise by £2.6 billion for 2020-21, £4.8 billion for 2021-22, and £7.1 billion for 2022-23, compared to 2019-20. This includes £780 million extra for high needs in 2020-21, to support children with special educational needs and disabilities.
3. This delivers on the Prime Minister's pledge to increase school funding by £4.6 billion above inflation by 2022-23. On top of this, we will provide £1.5 billion per year to fund additional pension costs for teachers. Overall, this will bring the schools budget to £52.2 billion in 2022-23. In 2020-21 alone, school funding will increase by 5% compared to in 2019-20, while high needs funding will increase by 12%. This substantial investment will give schools the resources they need to raise standards even further, and to equip pupils with the skills and knowledge they need to succeed, no matter what their background or where they live.
4. This additional funding will also deliver on the Prime Minister's pledge to level up school funding. We are providing enough funding for every school to see their per pupil funding protected at least in line with inflation, whilst at the same time giving the biggest increases to those schools with the lowest funding. From next year, every secondary school will receive a minimum of £5,000 per pupil, with every primary school getting £3,750 - putting primary schools on the path to receiving at least £4,000 per pupil the following year.
5. The National Funding Formula for schools has made the funding system fairer, directing money based on the actual needs of schools and pupils rather than accidents of geography or history. In 2020-21, we will continue to implement the formula to address historic underfunding and move to a system where funding is based on need. To support this, we will remove the cap on schools' gains, so that underfunded schools attract all of the gains they are due.
6. Finally, we have confirmed the government's intention to move to a 'hard' National Funding Formula for schools as soon as possible, where every school's budget will be set on the basis of a single, national formula. Making this transition will ensure that the funding system is fair and transparent for every school in the country, with similar schools receiving similar funding, no matter where they are located. We recognise that this will represent a significant change and we will work closely with local authorities, schools and others to make this transition as smooth as possible. As a first step towards hardening

the formula, from 2020-21 we will make it compulsory for local authorities to use the national minimum per pupil funding levels in their own funding formulae.

7. This document sets out the main changes to and overall design of the National Funding Formula in 2020-21. For a more detailed overview of the National Funding Formula as a whole, and changes that were made in 2019-20, please see the [2018-19 policy document](#) and the [2019-20 policy document](#).

The national funding formula for schools

8. The basic structure of the schools national funding formula (NFF) is not changing for 2020-21. However, we have changed some specific features of the formula, alongside making some technical changes. These are outlined below.

9. For more detail on the how the NFF works, and on operational arrangements for 2020-21, please see the technical note and [operational guide](#).

Figure 1: Factors in the schools national funding formula

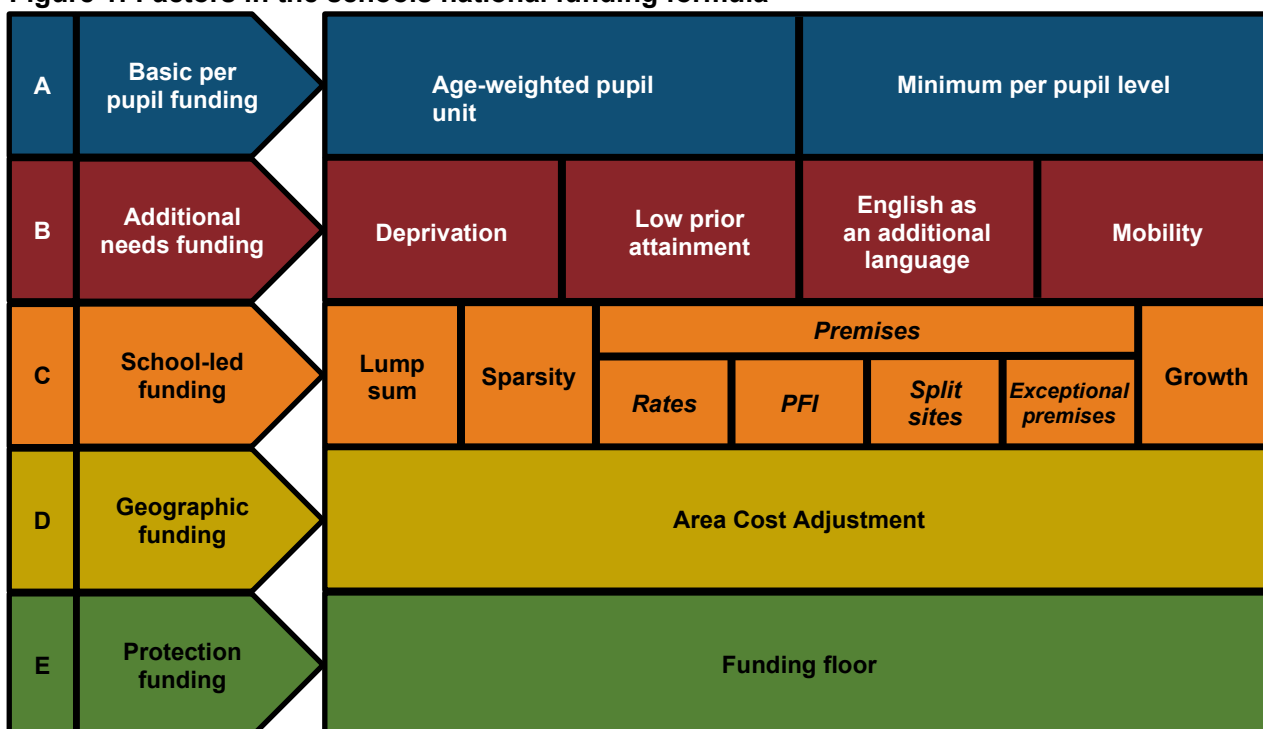


Figure 1: This illustrates the factors that will be taken into account when calculating schools block DSG funding allocations through the national funding formula. It is not to scale. Funding for factors in italics will be allocated to local authorities on the basis of historic spend.

Minimum per pupil funding levels

10. The additional money we have invested in schools means that we are able to significantly increase the minimum per pupil levels of funding. The minimum per pupil levels in 2020-21 will be set at £5,000 for secondary schools and £3,750 for primary schools – putting primary schools on the path to receiving at least £4,000 per pupil the following year. This is in line with the Prime Minister’s pledge to level up the lowest funded schools.

11. The minimum levels recognise that there are pupils requiring additional support in every school in the country, including in the lowest funded schools. The increase to the minimum levels will help to ensure that every child in the country – regardless of which school they attend, or where they grew up – can receive a superb education.

12. The minimum levels for all schools are calculated using a weighted average of the rates for primary, KS3 and KS4, which reflects the number of year groups a school has in each key stage. This ensures consistency for all schools, including those with non-standard year group structures. We will apply the following calculation:

$$\text{(No. of primary year groups} \times \text{£3,750)} + \text{(No. of KS3 year groups} \times \text{£4,800)} \\ + \text{(No. of KS4 year groups} \times \text{£5,300)}$$

Divided by

Total number of year groups

13. This ensures per pupil funding of at least £3,750 for each primary school, and £5,000 for each secondary school, with standard structures of 7/5 year groups respectively. For middle schools, all-through schools and other schools with a non-standard year group structure this will produce a specific minimum per pupil value that relates to the number of year groups in each phase. For new and growing schools, the minimum will be calculated based on the number of year groups they will have in 2020-21, as recorded in the APT.

14. We intend to make the minimum per pupil funding levels a mandatory factor in local formulae in 2020-21, and we have launched a [consultation](#) on how best to implement this in local funding formulae. The consultation closes on 22 October 2019 and the government response will be published in November 2019. Making this factor mandatory will mean that the minimum levels that are provided for in the NFF are delivered locally, at the values used in the school NFF, reassuring school leaders and parents that every school will receive at least this level of funding.

The funding floor

15. The 2020-21 NFF funding floor is set at 1.84%, in line with the latest forecast GDP deflator.¹ This means that every school will attract an increase in their pupil-led funding of at least 1.84% per pupil, compared to their funding floor baseline. We have used 2019-20 NFF allocations as the baseline for applying the funding floor. This will ensure that 2020-21 schools NFF allocations are not affected by decisions taken locally in previous years regarding local funding formulae or by transfers out of the schools block. We apply the

¹ <https://www.gov.uk/government/collections/gdp-deflators-at-market-prices-and-money-gdp>

funding floor using the same methodology as the minimum funding guarantee methodology used in local formulae.

16. We will no longer use 'if full' baselines to calculate the funding floor for new and growing schools. We will instead take the same approach as for all other schools. The rationale for using 'if full' baselines is significantly changed by the use of NFF (rather than actual) allocations for the baseline. This change will simplify the calculation of NFF allocations for new and growing schools and increase alignment with local formula setting processes. For brand new schools – those that were not included in the 2019-20 NFF – we will continue to calculate theoretical baselines.

17. Further details on the calculation of the funding floor can be found in the schools NFF technical note.

Funding factor values

18. The additional money we have invested in schools for 2020-21 means that we can increase all of the key factors in the NFF by 4%. This means that schools which are already attracting their National Funding Formula allocations will attract a significant increase in both cash and real terms. The free school meals factor will be increased by 1.84% in line with inflation as the factor value is based on an estimate of the actual cost of providing school meals. Premises funding will continue to be allocated at local authority level on the basis of actual spend in the 2019 to 2020 APT, with the PFI factor increased in line with the RPIX measure of inflation (3.03%).²

Moving towards a hard national funding formula

19. Since its introduction in 2018-19, the NFF has replaced an unfair, out-dated and opaque funding system with one that distributes funding based on schools' and pupils' needs and characteristics. This is directing resources where they are needed most, improving transparency and predictability for schools, and addressing historic disparities between areas.

20. Currently, local authorities retain flexibility over how they distribute the funding they receive through the NFF locally, in consultation with schools. This has allowed them to manage the transition towards the NFF, towards which we have seen significant progress in its first two years. The majority of local authorities have chosen to move towards the NFF locally, with 81 authorities this year moving every one of the factor

² <https://www.ons.gov.uk/economy/inflationandpriceindices/timeseries/chmk/mm23>

values in their own local formulae closer to the national formula since its introduction. 121 authorities chose to use the factor for minimum per pupil funding levels this year.

21. We will build on this progress by implementing a 'hard' NFF as soon as possible, whereby schools receive what they attract through the national formula, rather than through different local authority funding formulae. This will complete our reforms to make the funding system fair, consistent and transparent for every school in the country.

22. We will work closely with local authorities, schools and other stakeholders in order to make this transition, carefully considering the issues that remain to be resolved under a hard formula, such as where funding relies on local intelligence or is tied to local duties. Further detail on how we plan to go about this will be announced in due course, but we are of course mindful not to introduce significant change without adequate lead-in times.

23. In 2020-21, local authorities will continue to have discretion over their schools funding formulae and, in consultation with schools, will ultimately determine allocations in their area. As noted above, as a first step towards hardening the formula, in 2020-21 the government will make the use of the national minimum per pupil funding levels compulsory.

Other changes to local formulae

24. We have made some other changes to how local authorities can set their local formulae this year, in addition to making the minimum per pupil funding levels mandatory.

25. Local authorities will continue to set a Minimum Funding Guarantee in local formulae, which in 2020-21 must be between +0.5% and +1.84%. This allows them to mirror the real terms protection in the NFF, which is the Government's expectation.

26. Local authorities will continue to be able to transfer up to 0.5% of their schools block to other blocks of the DSG, with schools forum approval. A disapplication will be required for transfers above 0.5%, or for any amount without schools forum approval; this now applies to any transfers over 0.5%, even if the minister agreed the same amount in the past two years.

Mobility

Mobility funding from 2020-21

27. The mobility factor is intended to support schools in which a high proportion of pupils first join on a non-standard date. In 2020-21, we are introducing a formulaic approach to allocating mobility funding in the NFF, using a new and more robust methodology to determine pupil mobility than that used previously in LAs' local formulae.

28. In 2019-20 we allocated £21 million of mobility funding to local authorities based on what they spent on mobility the year before. For the past two years, we have funded the factor on a historic basis due to the unreliability of the previous data. This means that only the 63 local authorities that chose to use the factor in 2018-19 were eligible for mobility funding in 2019-20.

29. We have stated previously that we did not consider this approach to be consistent, as schools with high mobility in local authorities that do not use the factor were not attracting additional funding. After discussion with local authorities, we committed to introducing a new formulaic approach in 2020-21.

30. The new mobility factor is fairer because it will ensure that we are treating all schools with high mobility consistently and fairly, using a methodology that eliminates the need for local authorities to manually adjust the data before using it in local formulae. Funding mobility on a formulaic basis is also consistent with our intention to move to a hard NFF.

New methodology

31. Our new methodology involves tracking individual pupils using their unique pupil ID through censuses from the past 3 years rather than relying on a single census. If the first census when the pupil was in the school was a spring or summer census, they are classified as a mobile pupil. This excludes reception pupils who start in January. For the purposes of the factor, we are not counting as mobile pupils who joined in the summer term after the summer census, or pupils who joined in October before the autumn census. This is because the first census these pupils will be captured in is the autumn census. This new methodology offers a significant improvement over the previous approach.

Allocating funding for mobility

32. For each local authority, the mobility factor will allocate funding for schools whose proportion of mobile pupils in each phase is above a threshold of 6%. As the new methodology eliminates pupils incorrectly identified as mobile in the old system, the number of pupils identified as mobile, in the authorities currently using the factor, is considerably lower. Because of this, and to minimise disruption, we have opted to lower the threshold from its previous value of 10%, with the intention of capturing a similar cohort size and a similar number of schools overall in the 63 local authorities that were already using the factor.

33. All mobile pupils above that threshold will be allocated a per pupil amount at a rate of:

33.1. £875 for each primary mobile pupil above the threshold; and

33.2. £1,250 for each secondary mobile pupil above the threshold.

34. We have set the rates based on the principle of broadly maintaining the overall levels of mobility funding by phase for local authorities that currently use the factor (£21 million overall in 2019-20), and increasing the funding through the factor in order to extend it to all local authorities.

35. Moving to a new methodology will inevitably result in some change at local authority and school level. From 2020-21 we are now including mobility funding in our calculation of the funding floor. This ensures that no school will see a fall in their NFF allocation as a result of the new mobility factor.

36. Mobility will continue to be an optional factor for local authorities to use in their local formulae. We will supply local authorities with mobility data calculated according to the new method in the APT.

Growth

37. In 2019-20 we introduced a new methodology for the growth factor, designed to distribute this funding based on the actual growth that local authorities experienced between successive October censuses, rather than the amount they have historically chosen to spend.

38. Due to the wide variation in growth spending, in 2019-20 we provided a transitional protection for local authorities from significant losses, whereby no local authority's growth allocation fell by more than 0.5% of the previous year's total schools block. We will continue to provide this in 2020-21, so that those local authorities already on the transitional protection can again not lose more than 0.5% of their total 2019-20 schools block amount in their 2020-21 growth allocations. In 2019-20, we also implemented a cap to offset the cost of this protection. This meant that any gains under the new growth formula of more than 50% of a local authority's previous year's growth allocation were scaled back by 50%. In 2020-21 we are removing this gains cap, to ensure that local authorities receive their full allocation under the growth factor methodology, as measured by the actual growth they have experienced.

Local authority protection

39. In 2020-21, we will ensure that all local authorities see at least a 1.84% increase in their schools block per pupil funding. We have calculated this top-up on a provisional basis, across all funding aside from growth, and included this in the LA allocations table. We will recalculate this based on final Dedicated Schools Grant (DSG) allocations in December.

Factor values and total spend in 2020-21

	Unit Values	Total Funding (including ACA)	Proportion of core total
Basic per pupil Funding		£25,922m	73.5%
AWPU		£25,656m	72.8%
Primary AWPU	£2,857	£13,263m	37.6%
KS3 AWPU	£4,018	£7,268m	20.6%
KS4 AWPU	£4,561	£5,125m	14.5%
Minimum per pupil		£266m	0.8%
Primary Minimum Per Pupil funding	£3,750	£123m	0.3%
Secondary Minimum Per Pupil funding	£5,000	£143m	0.4%
Additional Needs Funding		£6,307m	17.9%
Deprivation		£3,188m	9.0%
Primary FSM	£450	£322m	0.9%
Secondary FSM	£450	£193m	0.5%
Primary FSM6	£560	£613m	1.7%
Secondary FSM6	£815	£677m	1.9%
Primary IDACI A	£600	£93m	0.3%
Primary IDACI B	£435	£173m	0.5%
Primary IDACI C	£405	£128m	0.4%
Primary IDACI D	£375	£136m	0.4%
Primary IDACI E	£250	£107m	0.3%
Primary IDACI F	£210	£100m	0.3%
Secondary IDACI A	£840	£76m	0.2%
Secondary IDACI B	£625	£149m	0.4%
Secondary IDACI C	£580	£111m	0.3%
Secondary IDACI D	£535	£118m	0.3%
Secondary IDACI E	£405	£105m	0.3%
Secondary IDACI F	£300	£88m	0.2%
Low Prior Attainment		£2,653m	7.5%
Primary LPA	£1,065	£1,680m	4.8%
Secondary LPA	£1,610	£973m	2.8%
English as an Additional Language		£415m	1.2%
Primary EAL	£535	£308m	0.9%
Secondary EAL	£1,440	£107m	0.3%
Mobility		£51m	0.1%
Primary mobility	£875	£41m	0.1%
Secondary mobility	£1,250	£10m	0.0%
School Led Funding		£3,026m	8.6%
Lump Sum		£2,359m	6.7%
Primary lump sum	£114,400	£1,973m	5.6%
Secondary lump sum	£114,400	£386m	1.1%
Sparsity		£26m	0.1%
Primary sparsity	£26,000	£22m	0.1%
Secondary sparsity	£67,600	£4m	0.0%
Premises		£641m	1.8%
<i>Area Cost Adjustment: A multiplier that is applied to basic per pupil, additional needs and school led funding (ACA is already included in each of the factor subtotals)</i>		£883m	
Core total (excluding funding floor)		£35,255m	
Protections			
Floor		£464m	
Primary floor funding		£277m	
Secondary floor funding		£187m	
Total		£35,719m	

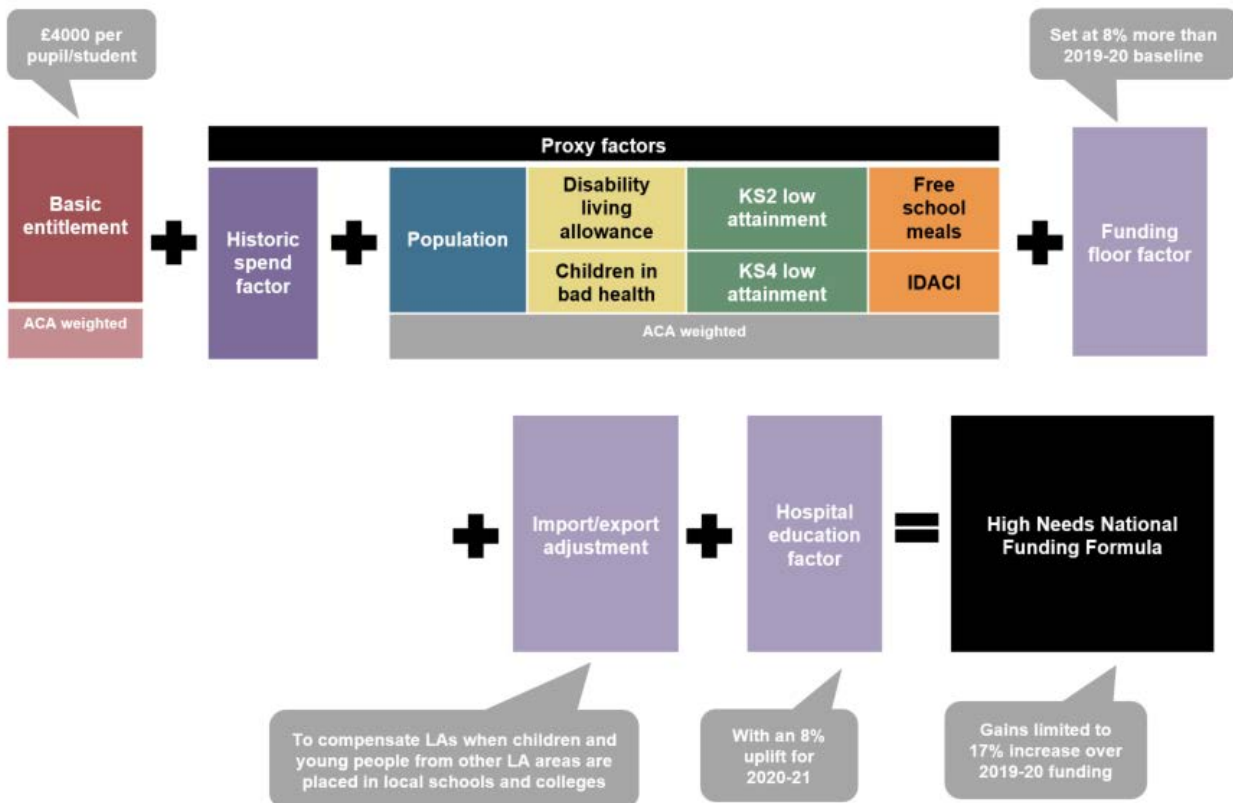
Figure 2: This shows the unit values, total funding and proportion of funding for each factor in the formula. Total funding is rounded to the nearest million. Proportion of core total funding is rounded to the nearest 0.1%. The core total funding and proportion of core total funding columns are calculated excluding floor funding, using 2019-20 authority proforma tool data and 2018/19 general annual grant data. We have excluded growth funding from this table as this funding will be calculated using October census data, so we will confirm growth spend in December.

The national funding formula for high needs

The high needs national funding formula in 2020-21

40. The basic structure of the high needs national funding formula is not changing for 2020-21. Figure 3 below sets out the factors and adjustments that comprise the formula, including an area cost adjustment applied to the basic entitlement and proxy factors.

Figure 3: basic building blocks of the formula in 2020-21



Updates to the high needs national funding formula in 2020-21

41. For 2020-21, we have updated the baseline to use local authorities' actual high needs allocations in 2019-20, rather than the previous baseline of planned spend in 2017-18. The baseline update also includes the additional £125 million per year in 2018-19 and 2019-20 which we announced in December 2018, and an adjustment to include funding for special free schools so that authorities receive this in future years through the high needs formula.

42. Two aspects of the formula will enable local authorities to see further increases in high needs funding for 2020-21.³ These two elements are:

42.1. **The funding floor** – this ensures that all local authorities' allocations increase by a minimum percentage compared to the baseline. For 2020-21 we are increasing the funding floor to 8% (per head of 2-18 population) compared to the previous 0.5% per annum floor against the 2017-18 baseline.⁴

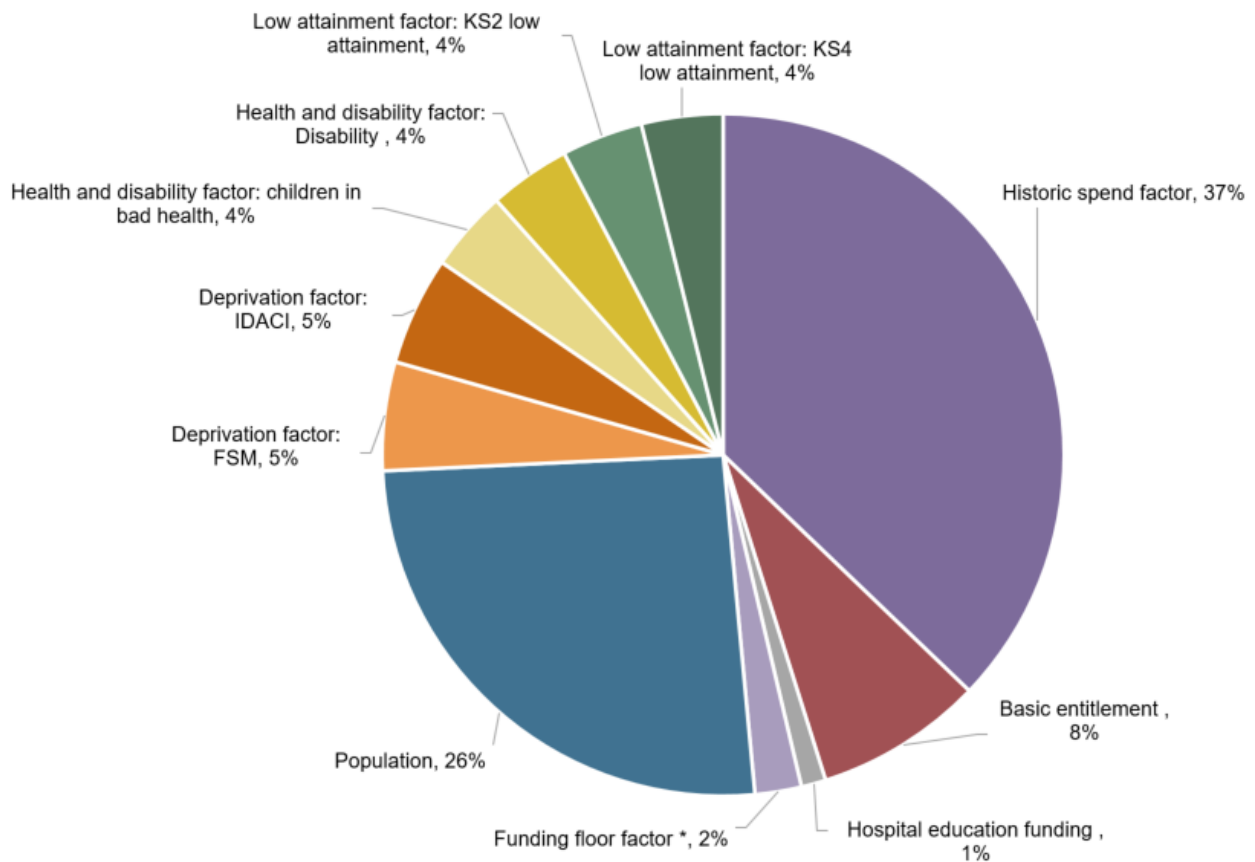
42.2. **The limit on gains** – the limit on gains will increase to 17% (per head of 2-18 population) compared to the baseline, so that authorities due to gain under the formula see more of their gains before those gains are capped. The previous limit was previously 3% per annum against the 2017-18 baseline.

43. The remainder of additional funding will be distributed through an increase to the proxy factors in the formula, keeping their relative factor weightings the same as previously. The historic spend factor will remain at the same cash value as previously.

³ The basic entitlement factor and import/export adjustment will continue be excluded from the funding floor and gains cap baselines as previously. Further detail can be found in the technical note.

⁴ The hospital education element will also be uplifted by 8%, in line with the funding floor.

Figure 4: Proportion of funding spent through the following elements of the formula



*Funding from the gains calculation has been excluded for the purposes of this diagram

44. For further details on the methodology used for the high needs formula, please refer to the 2020-21 high needs technical note once published. The technical note will also include information on the data updates and adjustments used within the high needs formula.

The national funding formula for central schools services

The central schools services formula in 2020-21

45. The central school services block (CSSB) within the DSG will continue to provide funding for local authorities to carry out central functions on behalf of maintained schools and academies. The block will continue to comprise two distinct elements: ongoing responsibilities and historic commitments.

46. Further details on the methodology used for the CSSB formula will be set out in the 2020-21 NFF technical note.

Ongoing responsibilities

47. The CSSB will continue to fund local authorities for the ongoing responsibilities they have a statutory duty to deliver for all pupils in maintained schools and academies. For 2020-21, we have protected the total allocated for this funding in 2019-20.

48. This element of the CSSB is calculated using a simple per-pupil formula, the structure of which is unchanged. 90% of the funding will be distributed through a basic per-pupil factor, and 10% of funding through a deprivation factor based on the proportion of pupils eligible for free school meals within the past six years (FSM6) in mainstream schools. Both elements will be adjusted for area costs.

49. Local authorities will continue to be protected so that the maximum per-pupil year-on-year reduction in funding for ongoing responsibilities is of -2.5%, while the year-on-year gains cap will be set at the highest affordable rate of 1.94%.

Historic commitments

50. As we have previously stated, from 2020-21 we will begin to reduce the element of funding with CSSB that some local authorities receive for historic commitments made prior to 2013-14. This is in line with our reforms to move to a fairer funding system, as we do not believe it is fair to maintain significant differences in funding indefinitely between local authorities which reflect historic decisions.

51. In 2020-21, for those local authorities that receive it, historic commitments funding will be reduced by 20%, with a protection so that no authority loses an amount equivalent to more than 0.5% of its 2019-20 schools block allocation.

52. We will continue to unwind this funding in future years, and will provide further detail in due course. Our expectation remains that commitments will also unwind over

time, for example as contracts reach their end points. However, in 2020-21 we are not changing the requirement in regulations that authorities spend no more on these commitments than they did in the previous year; therefore, with the approval of the schools forum, an authority can maintain spending in this area using other funding sources if they wish to.

Equalities Impact Assessment

53. The Public Sector Equality Duty (PSED) in section 149 of the Equality Act 2010 requires the Secretary of State to give due regard to achieving the following objectives in exercising their functions:

- 53.1. eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under the Equality Act 2010;
- 53.2. advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;
- 53.3. foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

54. We have considered the impact on persons who share any of the protected characteristics (these are age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, sexual orientation). We have focused on those protected characteristics for which the impact is largest, and which are most closely tied to the distributional policy choices we are making. We use incidence of SEND as a proxy for disability in this analysis, as the two are highly correlated, and ethnicity as a proxy for race.

55. We introduced the NFF in 2018-19 after significant consultation and published a full equalities impact assessment.⁵ We are broadly continuing the implementation of this version of the NFF. Therefore, we have focused this assessment primarily on the key policy changes that are being made in 2020-21.

Schools NFF

Increasing the minimum per pupil levels

56. Increasing the minimum per pupil levels for primary schools to £3,750 (on the way to £4,000) and for secondaries to £5,000 will benefit the lowest funded schools that do not otherwise attract these levels of funding through the other formula factors (i.e. for additional needs). As a result, the schools with the highest proportions of pupils with SEND will typically gain less as a result of this element of the formula, because these schools are likely to attract additional funding through other factors in the formula, and will therefore not be among the lowest-funded schools. Schools with the highest

⁵ https://consult.education.gov.uk/funding-policy-unit/schools-national-funding-formula2/supporting_documents/NFF_EqualityImpactAssessment.pdf

proportions of pupils from low-performing ethnicities and ethnic minorities will also typically gain less than other schools, because these characteristics in general correlate with higher overall funding at school-level.

57. However, it is important to note that there are individual pupils with both these characteristics who are currently in the lowest-funded schools and they will benefit from this policy. Furthermore, the overall policy of the NFF continues to allocate the greatest share of resources to pupils with additional needs, and therefore those most likely to have these protected characteristics. This specific element of the formula is also set alongside a very significant increase to high needs funding – channelling resources specifically towards pupils with SEND.

58. We plan to make it mandatory for local authorities to use the minimum per pupil funding levels in local formulae. This will ‘lock in’ this aspect of the schools national formula at a local level, where relevant. The current consultation on implementing mandatory minimum levels is specifically exploring the equalities impact of this change.

Increasing the funding floor

59. The increase to the funding floor will disproportionately benefit schools that have been more highly funded historically. These tend to be in urban areas, and have a higher proportion of children from low-performing ethnicities and ethnic minorities because these areas are more ethnically diverse. They also have a higher occurrence of non-Christian faith schools. We assess that this will have a positive impact on these pupils.

Changing the methodology for the mobility factor

60. During the first stage of the NFF consultation, respondents were concerned that our proposal to exclude a mobility factor from the NFF would disproportionately impact Gypsy/Roma pupils and pupils of Irish traveller heritage. We acknowledged these concerns and decided to include a mobility factor in the final NFF. Our improvements to the mobility factor means that we will now be extending mobility funding to all LAs, and not just the 63 LAs who previously used the factor. This means that all schools with high proportions of mobile pupils, including pupils with these protected characteristics, will attract mobility funding, enabling them to better support these pupils and manage the costs incurred by high levels of pupil mobility. We do not anticipate that our changes to the mobility factor will have any further impacts on pupils with other protected characteristics.

Increasing the remaining NFF factors by 4%

61. We have increased the key remaining NFF factors by 4%, which affects the majority of schools. We have also removed the gains cap, so that schools will attract the full gains they are due. This benefits schools which were underfunded under the previous

funding system, so all pupils attending these schools will benefit. Addressing historic underfunding moves closer to a fairer system where funding is based entirely on need.

62. As the balance between the factors remains broadly the same, the equalities impact of the overall 2020-21 formula will be consistent with the assessment published in 2017 (apart from those differences noted above).

High needs NFF

63. We have considered the impact of the high needs distribution on persons who share any of the protected characteristics. We have focused particularly on persons with SEND given the high level of correlation between pupils with SEND and pupils with disabilities.

64. We introduced the high needs NFF in 2018-19 after significant consultation and a full equalities impact assessment. We are distributing the funding for high needs, including additional funding for 2020-21, through the high needs NFF, and are not proposing any changes to the overall structure of the formula for 2020-21. Therefore, we have focused this assessment primarily on the aspects of the formula that have changed for 2020-21.

65. In recognition of the fact that all LAs are facing some pressures on their high needs budgets, we are allocating increased funding through the high needs NFF. We are distributing this increase in the following ways:

- 65.1. **A higher funding floor set at 8%.** This means that at a minimum, LAs will see at least an 8% per head increase in funding compared to what they received in 2019-20. This is a significantly higher protection than the previous threshold, which amounted to a 0.5% floor per year against the 2017-18 baseline and will ensure that all LAs receive a significant share of the additional funding.
- 65.2. **A higher limit on formula gains set at 17%.** The gains limit was previously equivalent to 3% per year against the 2017-18 baseline. A higher limit means that LAs will receive greater increases in funding before their gains are capped.
- 65.3. **Increased funding through the remaining proxy factors.** We have distributed the remaining funding through the proxy factors, keeping their relative weightings in the formula constant. This is in line with how the formula has worked previously and means that LAs will receive their share of this remaining funding based on the proxy factors of need. These include health and disability factors reflecting any changes in the proportion of the local population of 2-18 year olds whose families receive disability living allowance because they are disabled. The proxy factors also include an

amount of funding based on each local authority's previous spending, so that funding can reflect patterns of provision and spending not otherwise captured through the formula, and making sure that funding levels do not drive changes in the placement of disabled children to the detriment of the provision they need.

66. We expect this distribution of funding to provide both significant increases to all LAs as well as ensure stability through use of the formula. As a result, and subject to local decisions on how the funding is spent in making special provision, our assessment is that the additional funding will have a positive impact for those pupils identified as SEND (which includes those with disabilities), by improving their ability to access the right educational provision and thereby addressing educational inequalities for children with SEND.

Central School Services Block NFF

67. In 2020-21, we are protecting the total allocation for the ongoing responsibilities element of the CSSB, which funds local authorities for the statutory duties they deliver for all pupils. The formula that allocates this funding is broadly unchanged; we do not expect this to have an impact on different groups of pupils, including those with protected characteristics.

68. The reduction to funding for historic commitments will affect authorities' ability to continue to deliver certain central functions as they have previously – this is a continuation of our established policy to unwind these commitments. The nature of this expenditure, relating to a wide range of individual decisions by different LAs, means the scale of this reduction will be very variable and the evidence on its impact is limited. Where authorities combine this funding with other sources to support other services – for example, related to early intervention, programmes for vulnerable children or those with high needs – these are likely to disproportionately benefit pupils with protected characteristics, such as those from ethnic minority backgrounds or with disabilities. If the reductions mean an LA can no longer fund such services in the same way, this represents a negative impact.

69. However, unwinding this funding will address funding disparities to make the wider system fairer, so that educational provision for these pupils is based on need rather than historic decisions. Ultimately, prioritising funding for schools and high needs, which has significantly increased, benefits all areas and will respond to pupils' characteristics and needs. Pupils with disabilities, in particular, will benefit from the significant increase in high needs funding that all authorities will receive in 2020-21.

70. Finally, we are not making any changes to the regulations that local authorities can spend the same amount on historic commitments that they did in the previous year, nor are we changing the flexibility to transfer funding between blocks, with local

agreement. A local authority can therefore choose to maintain spending on historic commitments at current levels using other funding where appropriate.

Overall impact

71. As noted above, each change has a specific impact and in some cases these work in different directions. For example, in relation to the schools NFF, the increase to the minimum per pupil level is less likely to benefit pupils with protected characteristics, while the increase to the NFF funding floor is more likely to. Nevertheless, we do not think these individual changes significantly shift the conclusions of the equalities impact assessment published at the point of introducing the NFF in September 2017. The exception to this is the increase to high needs funding that all local authorities are seeing, which will have a positive impact on pupils with SEND in particular, and therefore on pupils with disabilities. This is a significant additional positive impact on these pupils beyond our previous assessment.



Department
for Education

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SCHOOLS FORUM WORK PROGRAMME 2019/20

25 October 2019	
Appointments	To appoint a chairman and vice-chairman for the Forum. To appoint a chairman for the Budget Working Group
Herefordshire schools budget 2020/21	To receive proposals for consultation on the 2020/21 schools budget and high needs budget 2020/21.
Budget Working Group	To receive a report on the activities of the Budget Working Group not covered elsewhere on the agenda. (recurring item)
Work programme 2019/20	To review the work programme and identify any additional items the forum wishes to consider.
17 January 2020	
Dedicated Schools Grant settlement	To receive a report on the DSG settlement and consider proposed schools budget 2020/21 (subject to DfE national formula).
Budget Working Group	To receive a report on the activities of the Budget Working Group not covered elsewhere on the agenda. (recurring item)
13 March 2020	
High needs budget proposals 2020/21	To consider proposals for the allocation of the high needs funding block for 2020/21 (subject to DfE national formula).
Budget Working Group	To receive a report on the activities of the Budget Working Group not covered elsewhere on the agenda. (recurring item)
10 July 2020	
National Funding Formula Update	To receive any updates on funding arrangements.
Annual review of membership	To review the membership of the Schools Forum to ensure proportionality.
Herefordshire Schools Forum Constitution	To review the constitution of the Herefordshire Schools Forum to ensure that it remains aligned with regulations, guidance and good practice.
Budget Working Group	To receive a report on the activities of the Budget Working Group not covered elsewhere on the agenda. (recurring item)
Work programme and meeting dates 2020/21	To approve the work programme and scheduled of meeting dates for the forum for 2020/21.

