

AGENDA

Herefordshire Schools Forum

Date: **Monday 7 December 2009**

Time: **2.00 pm**

Place: **The Council Chamber, Brockington, 35 Hafod Road,
Hereford**

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

For any further information please contact:

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Agenda for the Meeting of the Herefordshire Schools Forum

Membership

Chairman	Mrs JS Powell	
Vice-Chairman	Mr NPJ Griffiths	
	Mr T Edwards	Primary Schools
	Mrs J Cecil	Secondary Schools
	Mr S Pugh	Secondary Schools
	Ms T Kneale	Primary Schools
	Rev D Hyett	Primary Schools
	Mrs S Woodrow	Secondary Schools
	Mr T Knapp	Secondary Schools
	Mrs S Catlow-Hawkins	Secondary Schools
	Mr J Docherty	Secondary Schools
	Mrs S Bailey	Special Schools
	Mrs E Christopher	Pupil Referral Unit
	Mr A Leach	Church of England
	Mr P Burbidge	Roman Catholic Church
	Mrs A Pritchard	Teacher Staff Representative
	Mr M Harrisson	Teacher Representative
	Mr J Godfrey	14-19 Representative
	Mr A Shaw	14-19 Representative
	Mrs A Jackson	Early Years
	Mrs R Lloyd	Early Years
Non Voting	Councillor JA Hyde	Observer
	Councillor PD Price	Observer
	Councillor WLS Bowen	Observer

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AGENDA

		Pages
1.	APOLOGIES FOR ABSENCE To receive apologies for absence.	
2.	NAMED SUBSTITUTES (IF ANY) To receive any details of Members nominated to attend the meeting in place of a Member of the Forum.	
3.	DECLARATIONS OF INTEREST To receive any declarations of interest by Members in respect of items on the Agenda.	
4.	MINUTES To approve and sign the Minutes of the meeting held on 12 October 2009.	1 - 18
5.	LATE ITEMS/ANY OTHER BUSINESS To consider any issues raised as either a late item or any other business.	
6.	PROPOSED CHANGES TO THE SCHOOLS FORUM CONSTITUTION To consider proposals to amend the Schools Forum Constitution.	19 - 30
7.	SERVICE LEVEL AGREEMENTS - UPDATE To update the Forum on the progress in developing Herefordshire's use of service level agreements and buy-back between schools and Council services.	31 - 34
8.	PURCHASE OF EDUCATIONAL DIGITAL CONTENT FOR ALL SCHOOLS TO "PRIME" THE VIRTUAL LEARNING ENVIRONMENT To request one-off funding allocation of £354,932 for the purchase of digital content to "prime" the Virtual Learning Environment and to secure best value through county wide purchase for all schools (2 year license).	35 - 52
9.	PROPOSED USE OF DEDICATED SCHOOLS GRANT UNDERSPEND - BUILDING SCHOOLS FOR THE FUTURE To agree to use Dedicated Schools Grant under spend to enable Herefordshire to make best use of any Building Schools for the Future programme initiatives and money, to improve educational provision for children and young people in Herefordshire.	53 - 58
10.	PROPOSED USE OF DEDICATED SCHOOLS GRANT UNDERSPEND - HEREFORDSHIRE SCHOOLS TASK GROUP (HTSG) To agree to use Dedicated Schools Grant under spend to enable Herefordshire to support outcomes from the work of the HSTG and to ensure effective and supported communication and consultation events to implement recommendations.	59 - 62

11.	IN-YEAR FAIR ACCESS SUPPORT	63 - 68
	To request one-off funding allocation for the support of children and young people who are placed in secondary schools in emergency situations within the In-Year Fair Access Protocol.	
12.	ESTABLISHING NURTURE GROUPS IN PRIMARY SCHOOLS AND DEVELOPING AN APPROPRIATE SUPPORT NETWORK	69 - 74
	To fund the implementation of five trial Nurture Groups to be established in five Herefordshire Primary Schools, to support the implementation of these five Nurture Groups and to facilitate development, networking and ongoing support for the five groups as well as the recently-established trial group and to monitor and assess the applicability of Nurture Groups as a means of meeting Additional Educational Needs in Herefordshire.	
13.	DEVELOPING EARLY INTERVENTION FOR CHILDREN AT KS2 IN HEREFORDSHIRE	75 - 80
	To enable Herefordshire Local Authority Improvement and Inclusion Service (to emulate the School Based Intervention project currently in Herefordshire High schools) at KS2, by establishing School based Intervention in all of the primary schools which have at their heart the development of sound and lasting relationships.	
14.	MUSIC SERVICE FUNDING	
	To request a one-off payment from Dedicated Schools Grant to help with the current deficit budget. <i>(to follow)</i>	
15.	DEVELOPING READING RECOVERY IN HEREFORDSHIRE	81 - 84
	To request one-off funding allocation to enable Herefordshire Children's Services to set up and run a Reading Recovery Training Centre, to be based at Ledbury Primary School, in order for nominated teachers to be trained to deliver this intervention to the lowest attaining 5% Y1 pupils in Herefordshire.	
16.	REPORT OF THE BUDGET WORKING GROUP - 25 SEPTEMBER AND 13 NOVEMBER 2009	85 - 92
	To consider the recommendations of the Budget Working Group in agreeing an initial budget for schools.	
17.	FUNDING FOR INCLUSION GROUP - REVISED MODEL FOR DELAGATED BANDS 1 AND 2 FUNDING 2010/11	93 - 100
	To consider changes to the allocation method of delegated Bands 1 and 2 funding for 2010/11. Delegated Banded Funding is used by schools to provide for the special education needs of individual pupils.	
18.	SCHOOLS FORUM WORK PROGRAMME 2009/10	101 - 102
	To consider the schools Forum work programme for 2009/10.	

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HEREFORDSHIRE COUNCIL

BROCKINGTON, 35 HAFOD ROAD, HEREFORD.

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HEREFORDSHIRE COUNCIL

MINUTES of the meeting of Herefordshire Schools Forum held at The Council Chamber, Brockington, 35 Hafod Road, Hereford HR1 1SH on Monday 12 October 2009 at 2.00 pm

Present: Mrs JS Powell (Chairman)
Mr NPJ Griffiths (Vice Chairman)

Mrs S Bailey, Mrs S Catlow-Hawkins, Mrs J Cecil, Mr J Docherty, Mr T Edwards, Mr J Godfrey, Rev. D Hyett, Mr M Harrisson, Mrs A Jackson, Mrs T Kneale, Mr T Leach, Mrs A Pritchard, Mr S Pugh, Mr A Shaw and Mrs S Woodrow

In attendance: Councillor PD Price

30. APOLOGIES FOR ABSENCE

Apologies for absence were received from Mrs E Christopher and Mrs R Lloyd.

31. NAMED SUBSTITUTES (IF ANY)

There were no named substitutes.

32. DECLARATIONS OF INTEREST

There were no declarations of interest.

33. MINUTES

The Forum was informed that Mrs S Catlow-Hawkins and Mr P Box should be added to those present at the meeting.

A Member referred to Minute No. 24 regarding the constitution and was of the view that the Forum did not decide to increase the small school representation pupil number and did not agree to one Headteacher representing two schools.

The Chairman informed the Forum that an item would be added to the agenda for the next Forum meeting to reconsider the issues regarding the small school pupil number and to one Headteacher representing two schools.

RESOLVED: That

- (i) subject to the addition of Mr P Box and Mrs S Catlow-Hawkins to those present at the meeting, the Minutes of the meeting held on the 29 September 2009 be approved as a correct record and signed by the Chairman; and
- (ii) an item be included on the agenda of the next Forum meeting to consider amendments to the constitution relating to the small school representation number from 60 to 65 pupils and to the representation of two schools by one Headteacher.

34. LATE ITEMS/ANY OTHER BUSINESS

There were no late items or any other business.

35. HEREFORDSHIRE SCHOOLS TASK GROUP INTERIM REPORT - CONSULTATION PAPER (Pages 1 - 12)

The Director of Children's Services presented the Herefordshire Schools Task Group Interim Report on the way forward for the planning of Herefordshire provision of Schools. She reminded the Forum that the Schools Task Group was established following agreement of Cabinet Members, Headteachers and Chairs of Governors. The Task group comprising School Headteachers, Governor representatives, local officers with an independent Chair had produced the consultation document. She referred to discussions at the last Forum meeting regarding the effect on schools finance that the reduced Dedicated Schools Grant (DSG) settlement would have and that after discussion with the Chairman and Vice-Chairman of the Forum it was decided that the Forum should consider the consultation document. The views of the Forum would then be fed back to the Task Group.

The Director introduced Lyn Wright, Independent Consultant, who had presented a finance report to the July Forum meeting and had been invited to the meeting to discuss with Members the implications of falling school rolls and the consequential reduction in schools funding.

The Consultant circulated the following documents to Members at the meeting and are attached to these Minutes:

- (i) Herefordshire School Funding – Appendix 1
- (ii) Annual Decrease in Pupil Numbers Illustrating the Cumulative Effect - Appendix 2
- (iii) Pupil Numbers in Primary and Secondary Schools - Appendix 3
- (iv) Primary Schools Falling Numbers on Rolls - Appendix 4
- (v) Analysis of School Budget Per Pupil - Appendix 5
- (vi) Example of the Merging of Schools - Appendix 6

The Consultant referred to paragraph 1 of Appendix 1 regarding the DSG which was the main source of income to the schools budget which could be used for no other purpose. She drew Members attention to paragraph 3 which set out the decreasing pupil numbers over the last three years and the reduction in DSG funding over those years as a consequence. In referring to Appendix 2, Annual Decrease in Pupil Numbers Illustrating the Cumulative Effect, she highlighted the actual decreasing pupil numbers from 2006/07 to 2008/09 together with the projected reduction numbers from 2009/10 to 2010/2011 and the corresponding reduction in DSG.

The Forum noted that the figure set out in the penultimate line of Appendix 3 should read 1911.

The Consultant informed Members that Appendix 3 set out the primary and secondary reduction in pupil numbers at their peak to the current point in time amounting to 2,675 in total. Both peaks were underlined in Appendix 3. It was, in percentage terms, a reduction

of 12 percent. She also informed the Forum that three small schools had closed during that period. She informed Members that as at January 2009, there was a surplus of 17.6 per cent primary school capacity with secondary school capacity being at 9.5 per cent. The increase in surplus primary school capacity was slowing down but the increase in surplus secondary capacity was still on the rise which emphasised that the current issues and difficulties with schools funding will continue.

In answer to a Member's question, the Consultant informed Members that in some areas of the county some schools were losing pupils whereas some were gaining. She was concerned, however, that those pupils who had been lost would not come back to those schools in Herefordshire which meant that funding would be lost.

The Consultant referred to Appendix 4, Primary Schools Falling Numbers on Rolls, which illustrated in more detail the changes in school rolls. The figures were factual and had been taken from existing schools but the schools were not named. Three different size schools chosen at random were set out in the first part of the Appendix and all were losing pupils. The Appendix showed that if admissions continued at the same level as the September 2009 intake, then the schools would be significantly smaller in 2015 than they were in 2008.

In referring to Appendix 5, Analysis of School Budget Per Pupil, the Consultant informed the Forum that the Appendix illustrated the variation in budget per pupil for a range of primary and secondary schools from 2005/06 to 2009/10. Although the average total budget increase per pupil over those years was slightly over 30 per cent for all primary and secondary schools, changes in pupil numbers determined that the smaller schools received more than average per pupil funding whilst the larger schools received less. She further emphasised that this meant in general terms that all schools were paying for losses in Herefordshire.

The Consultant was of the view that all pupils in Herefordshire should have an equal entitlement to education but that this was not happening due to the way funds were allocated. She added that due to the fact that there was not enough funding for schools, any formula funding review would not solve the lack of money but merely redistribute the same inadequate amount.

The Consultant advised that to achieve a suitable response to the Task Group Interim Report, the Forum needed to look at the issues head on. She drew Members' attention to paragraph 6 in Appendix 1 which she considered was a way forward and which suggested that a strategic evaluation of existing provision was required in order to achieve the most effective use of resources available. This could be achieved by reducing levels of funding currently maintaining individual premises (which were receiving various forms of protection) thereby increasing funding to directly support teaching and learning in schools.

The Chairman made the point that as well as the Schools Forum, everyone in Herefordshire education has to address the issues facing Schools.

The Consultant agreed that Heads of Governors, Headteachers and the Council had to collectively find a solution. She reminded Members that 69 schools were receiving protection and that some were struggling financially. She emphasised that more funding would not be coming from central government. The Director of Children's Services advised that it was an issue for every school whether the school was small or large.

The Vice-Chairman was of the view that the Forum should frame its approach by stating that it would endeavour to find a solution to achieve a student's entitlement to funding and that would put in the discipline that the Forum would need.

A Member referred to the 2675 children that had already been lost from schools which amounted to £4.5 million in lost funding and that this needed to be spelt out to all concerned as that fact alone was more hard hitting than the Interim Report.

In answer to a Member's question, the Director of Children's Services advised that when the formal consultation period ended on 2 November 2009, Cabinet would consider the responses and key messages. If the messages agree with the consultation papers then the officers would act on the papers.

A Member suggested that the Forum should support the fact that the funding issue was a problem and, in accepting that fact, that there was a need to set about achieving a strategic evaluation.

It was suggested by a Member that a consultant could be engaged to develop a plan to sustain schools in view of the funding situation. The Director of Children's Services acknowledged that some authorities had brought in a consultancy to decide how and which schools would be affected. She emphasised that whether an outside body or Herefordshire Council carries out this work would not alter the issues facing schools and that one way or another the issues would have to be dealt with.

The Consultant advised that cluster groups needed to realise the current funding issues facing all schools and that one way to engage them would be to present to them the facts that had been set out before the Forum and that would get the underlying messages across.

A Member referred to the lack of any mention of Early Years in the Interim Report. The Member took the view that Early Years was affected by the issues and should be included in clusters.

In response to a request by Members, Lyn Wright agreed to circulate to Members electronic copies of the Appendices circulated at the meeting.

RESOLVED: That the Forum

- (i) agrees with the emphasis in paragraph 6 of Appendix 1 that the current status quo in terms of numbers of settings cannot continue in schools and that a strategic evaluation of existing provision is required in order to achieve the most effective use of resources available, by reducing levels of funding currently maintaining individual premises in various forms of protection and by increasing funding to directly support teaching and learning in schools;**
- (ii) endorses the need for a clear strategy for the way forward and the need for change;**
- (iii) agrees that the Primary Schools Association and the Herefordshire Association of Secondary Headteachers should be made fully aware of the current financial implications affecting schools;**
- (iv) acknowledges that some school closures will take place as a consequence of a sustainable future schools strategy and that an outside consultancy may well be employed to develop such a strategy;**
- (v) will look to outside agencies to support school clusters to develop and put forward viable solutions for schools;**

- (vi) will request the Task Group to amend the Interim Report to include Early Years and that Early Years be included in the clusters; and**
- (vii) agrees that the Chairman responds by letter to the Task Group setting out the views of the Forum as expressed in (i) to (vi) above.**

The meeting ended at 3.55 pm

CHAIRMAN

HEREFORDSHIRE SCHOOL FUNDING

1. The Dedicated Schools Grant (DSG) from central government is paid as a ring-fenced specific grant and must be used in support of the Schools Budget. It is the main source of income for the Schools Budget and can be used for no other purpose. It is based upon a per pupil formula using the January School Census data.
2. National funding reflects factors such as deprivation which affect urban and rural areas in different ways. The county has one of the lowest funding levels of the nationally distributed DSG at an overall ranking of 147 out of 149.
3. Pupil numbers in the county are decreasing annually.

Year	Status	Pupil Reduction	Amount per pupil £	DSG Reduction £
06/07 - 07/08	Actual	278	3,523	979,394
07/08 - 08/09	Actual	326	3,687	1,201,962
08/09 - 09/10	Actual	342	3,830	1,309,860

The total reduction in pupils over the period is 946 and the DSG reduction is cumulative. So in this financial year, if the pupil numbers had remained at 2006-7 levels, the authority would have had £3,623,180 additional funding.

4. The total small schools protection element in 2008-9 was £958,609.
 - i. 69 schools receive some form of protection
 - ii. In Primary Schools it is £109.80 per pupil below 200 on roll (63 schools).
 - iii. In High Schools it is £215.35 per pupil below 655 on roll (6 schools).
5. Every school receives a fixed base allocation for management and premises as shown below :

	Primary	Secondary	Special
2008-9	29,292	13,681	11,876
2009-10	30,083	14,051	12,196

6. Maintaining the status quo in terms of numbers of settings means that every school in the authority has reduced levels of funding and overall pupil entitlement is compromised in relation to that of other authorities. A strategic evaluation of existing provision is required in order to achieve the most effective use of resources available, by reducing levels of funding currently maintaining individual premises in various forms of protection and by increasing funding to directly support teaching and learning in schools. It is evident that any school reorganisation producing fewer schools will result in a combination of savings including fixed costs for individual premises and the small schools protection element. All remaining schools will benefit from these savings as they will stay within the ISB for redistribution via the funding formula across a smaller number of schools.

**Annual decrease in pupil numbers illustrating the cumulative effect
(2006-7 to 2010-11)**

Year	Status	Pupil Reduction	Amount per pupil £	In year reduction in DSG £	Cumulative pupil reduction	Cumulative reduction in DSG
06/07 - 07/08	Actual	278	3,523	979,394		
07/08 - 08/09	Actual	326	3,687	1,201,962	604	2,226,948
08/09 - 09/10	Actual	342	3,830	1,309,860	946	3,623,180
09/10 - 10/11	Projected	197	4,002	788,394	1,143	4,574,286

- The total reduction in pupils over the period where actual figures are available is 946.
- If the pupil numbers had remained at 2006-7 levels, the authority would have had £3,623,180 additional funding.
- If we use available projections for one year, the amount becomes £4,574,286.

Data extracted from Section 52 Budgets submitted to DCSF - Table 2

Year	Primary incl Nursery	High incl 6th Forms	Total
Actuals			
98/99	14,230	9,226	23,456
99/00	14,217	9,324	23,541
00/01	14,121	9,615	23,736
01/02	13,943	9,956	23,899
02/03	13,728	10,201	23,929
03/04	13,453	10,435	23,888
04/05	13,461	10,494	23,955
05/06	13,394	10,511	23,905
06/07	12,764	10,420	23,184
07/08	12,584	10,147	22,731
08/09	12,418	9,976	22,394
09/10	12,319	9,747	22,066

* Decrease in pupil numbers since peak for primary schools in 98/99 is **191** **1191**

* Decrease in pupil numbers since peak for high schools in 05/06 is **764**

**PRIMARY SCHOOLS
ALLING NOR**

APPENDIX 4

	Jan 08 NOR (excl NC)	January 2009 NOR						Estimated NOR in Sep 09 or Jan-10	REDUCTION IN NOR			Reduction in funding over two years x £2,200 per pupil			
		Yr R	1	2	3	4	5		6	TOTAL	(act) Jan 08 to Jan-09		(est) Jan 09 to Jan-10	(est) over 2 yrs	
School A	67	7	8	10	10	7	4	11	57	7	53	-10	-4	-14	-30,800
School B	153	12	13	13	22	23	15	24	122	12	110	-31	-12	-43	-94,600
School C	282	23	26	40	42	30	46	40	247	20	227	-35	-20	-55	-121,000

Assuming admissions continue at same level as Sept 09 intake:

	Est Jan 11	Est Jan 12	Est Jan 13	Est Jan 14	Est Jan 15
School A	56	56	53	50	49
School B	107	96	86	85	84
School C	204	197	178	161	158

Dated: 1.6.09

Analysis of School Budgets per pupil 2005/06 to 2009/10
 All data based on Table 2 Section 52 as submitted to DCSF

School	Year	Pupil number	Budget/pupil £	Budget £'000	% Increase in Budget/pupil	£ Four year	£ Average
Primary Schools							
School A	05/06	156	2,327	363			
	09/10	98	3,725	365	60.08%	689	172
School B	05/06	91	2,636	240			
	09/10	65	3,795	247	43.97%	356	89
School C	05/06	65	2,752	179			
	09/10	48	3,948	190	43.46%	357	89
School D	05/06	507	2,279	1,156			
	09/10	554	2,790	1,544	22.42%	-184	-46
School E	05/06	416	2,097	872			
	09/10	433	2,631	1,139	25.46%	-105	-26
School F	05/06	209	2,151	450			
	09/10	201	2,741	551	27.43%	-66	-17
All Primary School Average	05/06	13148	2,415	31,748			
	09/10	12319	3,151	38,812	30.48%	0	0
High Schools							
School G	05/06	376	3,227	1,213			
	09/10	310	4,332	1,343	34.24%	81	20
School H	05/06	1093	3,102	3,391			
	09/10	1196	4,009	4,795	29.24%	-78	-20
All High School Average	05/06	10511	3,031	31,862			
	09/10	9054	3,993	36,152	31.74%	0	0

SMALL SCHOOLS

	PER PUPIL		
	Existing school X 60	Existing school Y 120	Merged school Z 180
Number of Pupils	£ 60	£ 120	£ 180
Fixed - base allocation	547	273	182
Fixed - pupil funded	620	310	207
Total Allocation for fixed costs	1,167	583	389
Teacher sals EXCL HEAD	1,648	1,442	1,288
Resources	635	783	990
TOTAL	3,450	2,808	2,667

<i>difference</i>	
increased spending power of:	46,170
savings of:	64,000

	BUDGET PER SCHOOL		
	Existing school X 60	Existing school Y 120	Merged school Z 180
Number of Pupils	£ 60	£ 120	£ 180
Fixed - base allocation	32,817	32,817	32,817
Fixed - pupil funded	37,183	37,183	37,183
Total Allocation for fixed costs	70,000	70,000	70,000
Teacher sals EXCL HEAD	98,880	173,040	231,750
Resources	38,120	93,960	178,250
TOTAL	207,000	337,000	480,000
Assumed teachers EXCL HD	3.2	5.6	7.5

Assumed cost of teachers in 07/08 EXCL HEAD = £30,900

PUPIL TEACHER RATIOS (including head)	
Number of fte teachers =	
4.2	6.6
Therefore PTR =	8.5
1:14	1:18
	1:21

SUMMARY

Result of merging a 60 pupil primary & a 120 pupil primary to become merged school for 180 pupils:		
	£	<i>per pupil</i>
Savings of (formula allocation)	64,000	356
Increased spending power of	46,170	257
TOTAL =	110,170	612

APPENDIX 6

March 2009

MEETING:	SCHOOLS FORUM
DATE:	7 DECEMBER 2009
TITLE OF REPORT:	PROPOSED CHANGES TO THE SCHOOLS FORUM CONSTITUTION
ASSISTANT DIRECTOR PLANNING, PERFORMANCE AND DEVELOPMENT	CHRISTOPHER BAIRD

Wards Affected

County-wide

Purpose

To decide on proposals to amend the Schools Forum constitution.

Key Decision

This is not a Key Decision.

Recommendation(s)

THAT Schools Forum decides whether to adopt the following variations to the constitution:

- (a) the number used to determine a small school in terms of membership for schools forum be changed from 60 to 105**
- (b) that an additional membership place be provided for small primary schools;**
- (c) that one head teacher be allowed to represent two schools;**
- (d) that a Business Manager, representing all Business Managers, be added to the required membership of the forum.**

Key Points Summary

- Schools Forum approved a revised constitution in July 2009, to come into effect from September 2009. Since that time the Primary Schools Forum has requested that three

Further information on the subject of this report is available from
Christopher Baird, Assistant Director Planning, Performance and Development, 01432 260264

amendments be made. There was also some discussion at Schools Forum regarding membership and Business Managers.

Alternative Options

- 1 The constitution could remain as it currently stands.

Reasons for Recommendations

- 2 Primary Schools Association have requested that the number defining a small school for schools forum membership purposes be changed from 60 to 105; that an additional membership place is provided to represent small schools; and that one head teacher be allowed to represent up to two types of school, where there is a joint headship. This is to expand the possible options for primary schools to fulfil the membership requirements of Schools Forum.
- 3 Representation of the Business Manager role was discussed at Schools Forum, but no formal proposal was considered. This paper enables this consideration to take place.

Introduction and Background

- 4 Schools Forum's constitution was revised in line with the latest DCSF guidance. The constitution was approved and is attached, but subsequent changes are now suggested.

Key Considerations

- 5 Changes to the constitution must comply with statute and should comply with guidance and best practice. Regulations were amended in 2008 and one of the amendments was to enable Head teachers to be represented by senior school staff, meaning principal, Deputy Head teacher, bursar or other person responsible for the financial management of the school.
- 6 The proposed changes to increase the number of Primary School representatives would mean that there would in effect be seven primary school representatives, including governors and six high school representatives.
- 7 The role of the Business Manager will evolve in Herefordshire. There may be Business Managers for single schools, or groups of schools. As part of broadening the representation present at Schools Forum it is recommended that the Business Manager be from a different school to other members of Schools Forum.

Community Impact

- 8 It is important that Schools Forum reflects the profile of schools across the authority.

Financial Implications

- 9 No financial implications are attached to the proposals.

Legal Implications

- 10 The Schools Forum constitution must comply with statute. These changes, if adopted, would do so.

Risk Management

- 11 These proposals have been suggested by Primary Head teachers Forum and by Schools Forum to lessen the risk of primary school representation not being achieved, and also to increase Schools Forum's capabilities by including representation from Business Managers.

Consultees

- 12 Primary Schools have put forward the three primary school proposals. Schools Forum discussed the Business Manager membership issue in brief at the last meeting.

Appendices

- 13 Appendix.1 Current Schools Forum Constitution.

Background Papers

- Revised Constitution for Schools Forum 7 July 2009

HEREFORDSHIRE SCHOOLS FORUM MEMBERSHIP AND CONSTITUTION

1. Introduction

The Schools Forum is established by virtue of 47A of the School Standards and Framework Act 1998 (as amended by the Education Act 2002) and the School Finance (England) Regulations 2006.

2. Function

The Schools Forum will have several main functions as listed below, but may also consult on other items that the Local Authority deems appropriate. Details are defined in the Schools Forum (England) Regulations 2002 and School Finance (England) Regulations 2006 as well as guidance issued by the Department for Education Skills, subsequently updated under the Department for Children Schools and Families (DCSF), including the School Finance Regulations 2008.

3. Purpose of the Forum

Regulations prescribe three main functions on which the Local Authority must consult the forum as follows:

- a. On changes to the schools funding formula
- b. On the terms of contracts to be let by the Local Authority for services to schools, paid from the schools budget. (Subject to a de-minimis level)
- c. On issues relating to the management of the Schools Budget, including:
 - arrangements for the education of pupils with special educational needs
 - arrangements for the use of pupil referral units and the education of children otherwise than at school
 - arrangements for early years education
 - insurance arrangements
 - prospective revisions to the Local Authority's financing scheme for the financing of schools
 - administration of central government grants to schools
 - arrangements for free school meals

The Local Authority will consult the Forum on Local Authority Budget Issues.

4. Powers and Duties

The schools forum is an advisory body, established to represent schools views to the Local Authority. In addition, the forum has decision-making powers in specific areas, as follows:

- Approving increases to the DCSF prescribed limits on centrally managed expenditure
- Formula changes during multi-year funding periods (in exceptional and limited circumstances)
- To agree the level of school specific contingency held

- Approving minor amendments to the Minimum Funding Guarantee – in limited circumstances (eg to remove anomalies), provided no more than 50% of pupils in schools are affected.
- To agree arrangements for combining elements of the centrally managed budget with elements of other services where there are resulting benefits for schools and pupils.

5. Membership

The Herefordshire Schools Forum will have 24 members elected as follows:

School Members:

- 5 Primary Schools Head teacher representatives
- 1 Primary School Governor representative
- 5 Secondary School Head teacher representatives
- 1 Secondary School Governor representative
- 1 Special School Head teacher representative
- 1 Special School Governor representative
- 1 School with a Nursery representative
- 1 Pupil Referral Unit (PRU) Management Committee representative

Non School Members:

- 2 Diocesan Representatives
- 2 Trade Union representatives, 1 Primary School and 1 Secondary School
- 2 Early Years representatives
- 2 14-19 Partnership representatives

24 Total Forum members

The Members with observer status are as follows:

- Cabinet Member for Children's Services
- Cabinet Member for ICT, Education and Achievement.
- Children's Services Scrutiny Committee Chairman

6. Tenure of Office

Each member will have a three-year term of office (unless they become Chair or Vice Chair). In the event that a member of the forum ceases to hold the office, the term of office ceases and another appointment must be made. The replacement will serve the remainder of the term.

7. Quorum and Substitutes

The Forum shall not be quorate if less than 40% of the total membership is present at the meeting. Members unable to attend should therefore arrange cover from nominated substitutes, appointed in compliance with the arrangements below.

Substitutes are to be nominated in the same way as members. Democratic Services should be notified of the names of all substitutes.

Head teachers can be represented by senior school staff including principals, deputy Head teachers, bursars or other persons responsible for financial management of the school.

8. Election Arrangements School Members

School members of the forum must be nominated via a process “determined by the constituents represented by members of that group”.

9. Primary Head Teacher Members

Five Head teacher representatives (plus substitutes) to be appointed following expressions of interest and an election procedure concluded at the appropriate primary Heads meeting to which all primary Heads in that given area are invited.

To ensure appropriate representation within the primary phase, the following overriding criteria are established:

- At least 1 primary head member must represent community schools
- At least 1 primary head member must represent voluntary controlled/voluntary aided/foundation schools

There must be at least 1 member representing each of the following:

- a school less than 60
- a school more than 60

10. Secondary Head Teacher Members

Five High School head teacher representatives (plus substitutes) must be appointed via an election procedure concluded at the Herefordshire Association of Secondary Heads (HASH) meeting to which all secondary heads are invited. HASH will set the term of office for their representatives within the maximum term set out in paragraph 6.

The following overriding criteria must be applied:

- At least 1 secondary head members must represent community schools
- At least 1 secondary head member must represent voluntary controlled/voluntary aided/foundation schools
- At least 1 head must represent 11-16 schools
- At least 1 head must represent 11-18 schools

11. Head teacher of a school with a Nursery

The member (plus a substitute) should be elected by the heads of the Herefordshire maintained schools with nurseries.

12. Special School Head teacher members

One special school head (plus a substitute) will be elected by the special schools head teachers at a meeting to which all special school head teachers are invited.

13. Governor Members

Three Governors (plus substitutes) must be appointed via an election procedure concluded at the Herefordshire Association of Governors (HAGs) meeting to which all governor representatives are invited (irrespective of whether they are members of HAG as follows:

Primary Governor:
Secondary Governor
Special School Governor

A maximum of one member from any one governing body may sit on the forum.

The representatives must also be the chair of their school governing body finance committee or equivalent.

A Head teacher may not sit as a governor representative.

The HAGs should seek to ensure an appropriate geographical and size of school representation.

14. PRU representative

The forum member (plus a substitute) should be appointed by the Management Committee of the Pupil Referral Service.

15. Non School Members

Diocesan representation (plus substitutes) should be one from each faith, membership to be secured through the Standing Advisory Council Religious Education.

Trade Union representatives will report back to the Teaching Union meeting, thereby representing all unions. The representative should be appointed via an election procedure concluded at the Teaching Unions meeting.

Early Years representatives (plus substitutes) should be appointed via the Early Years Steering Group and should represent the independent and voluntary sector, rather than school nursery provision.

The representatives from the 14-19 consortium (plus substitutes) should be appointed via an election concluded by the 14-19 consortium.

16. Election of Chair and Vice Chair

The Chair and Vice-Chair must be elected from the Forum's own members. The Chair and Vice-Chair will hold these positions for a maximum of two years. This extends the period of membership of Schools Forum beyond the period set out in 4.3. The Chair and Vice Chair should represent different sectors of the school community.

When the Chair and Vice-Chair are not present, the meeting can elect a Chair for that meeting only.

17. Managing the Business

The following operational timescales and procedures are required to ensure that Schools Forum operates efficiently and has sufficient information and time to consider the issues.

18. Frequency of Meetings

Schools Forum should meet at least six times a year including the following months:

September
November
January
February
March
June

Dates must be set annually for the forthcoming year.

19. Forward Plan and Agenda Setting

A forward plan must be established and reviewed by the Forum on an annual basis, usually in February of each year. The following should be considered through the annual cycle:

February – programme of work for the following financial year
June outline proposals covering the areas of work contained in section 2
September – details of work set out in June
November – sign off of work to be consulted with all schools, in time to inform budget setting and Cabinet decision making in February

Agenda must be agreed by the Assistant Director, Improvement and Inclusion in consultation with the Chair of Schools Forum one week after the last forum meeting. Democratic Services will provide the resource to facilitate the forum, including organising and sending out agenda and papers, Minutes and action sheets.

A common format for all reports must be followed, using the attached template, Annexe 1.

Papers for Schools Forum must be circulated seven working days before the Schools Forum date. They are required to be signed off by Herefordshire Council's Head of Finance, Assistant Chief Executive Legal and Democratic, Head of Risk Management and the Assistant Director, Improvement and Inclusion prior to circulation.

Briefing meetings for the Chair must take place at least three working days before each Schools Forum meeting.

Minutes and an action sheet from each Schools Forum meeting must be circulated seven working days after the Schools Forum meeting as draft, and the Minutes will be formally considered and confirmed at the following Schools Forum meeting.

20. Decision Making

Schools Forum is an important body within the financial and service planning activities of Herefordshire Council, the Herefordshire Partnership and Children's Trust. As set out in section 2, Schools Forum is primarily a consultative body, with some decision making

responsibilities. The Local Authority will take the views of Schools Forum into account before finalising arrangements on which the Forum has been consulted, at a Directorate Leadership Team and Lead Member, Cabinet and Council level.

Recommendations to the Council should normally be made through consensus. Majority voting should be used to decide any issues, with each representative casting one vote. The Chairman will have the casting vote in the event of a tie.

In the event of an urgent decision being required an email will be sent to all Schools Forum members fully explaining the issue on which a decision is required. Forum members will be required to submit their response via email to the date required. No decision will formally be made until a quorate number of responses has been received by the Assistant Director, Improvement and Inclusion. This process will be administered by Democratic Services.

Schools Forum should receive feedback on the decisions made by Herefordshire Council that have taken into account Schools Forum views as part of any consultation process. The Chair of Schools Forum can invite Council Members to provide feedback at Schools Forum meetings.

21. Working Groups

Herefordshire Children and Young Peoples Directorate (CYPD) and schools should try to make use of existing working groups wherever possible, to minimise duplication and use existing expertise. In order to support and advise the work of the Schools Forum existing working groups can be approached to provide information on related activities. The Forum can also, if required, set up working groups for specific tasks. Such groups could be time-limited and would need to establish clear remits, appropriate membership and operating principles.

- (i) The full Schools Forum remains the decision making body for the responsibilities covered in section 3. Working groups and other groups will provide information, advice and options.
- (ii) Current Schools Forum Working Groups:
 - (a) **Budget Review Working Group:** This group is established as a permanent advisory sub-group of the full Schools Forum. Importantly it reports to Schools Forum (SF), and is not itself a decision-making body.

Remit:

To provide additional support and time to consider information and data in order to inform the development of key budgetary options, recommendations and decisions relating to Dedicated Schools Grant.

Membership:

Identified members of SF including Chair and Deputy CYPD Assistant Director, Improvement and Inclusion
Finance officers

Operating principles:

To assess financial information prior to presentation to Schools Forum
To consider implications of any financial proposal
To draft papers for submission to full Schools Forum meetings

To provide considered information and advice to support the work of the full Schools Forum.

- (iii) Working groups that could support the work of Schools Forum:

The following working groups have been established to develop strategy for key priority areas and to ensure effective management and implementation of delivery. The financial element of this responsibility provides information to Schools Forum and supports SF processes.

- (a) **Funding for Inclusion Group:** This group was established to develop a strategy for the delegation of Additional Needs funding direct to schools and settings.

Remit:

To design models for delegation of Additional Needs funding.
To draft proposals for CYPD DLT, Schools Forum and Cabinet consideration.
To carry out thorough consultation.
To monitor implementation.
To monitor and review impact.

Membership:

This group has a large membership consisting of school representatives, stakeholders, CYPD officers and Finance officers.

Operating principles:

To assess information on delegated funding models
To analyse Herefordshire requirements
To analyse data on finance
To analyse range of Additional Needs and pupil numbers
To report back to all key decision making bodies
To be accountable for model implementation
To be responsible for monitoring of effectiveness.

- (iv) Other such groups include:

Service Level Agreement Group
Early Years and Extended Services
Connexions Working Group
Joint Agency Management Group
Children's Trust Management and Outcome Groups

Schools Forum and CYPD aim to make the most of existing groups, rather than create new ones. The above list will develop and change according to work requirements.

AGENDA ITEM NO. ???

HEADING

REPORT BY

SCHOOLS FORUM

19 MARCH 2009

Schools Affected

Purpose

Choose one of the following:

for information

to update on progress

to highlight issues and agree next steps

for consideration and decision making

Financial Implication

Background

Including links to legislation, national and local initiatives, Herefordshire's Children and Young People's Plan

Issues or Risks

Recommendations

Background Papers

MEETING:	SCHOOLS FORUM
DATE:	7 DECEMBER 2009
TITLE OF REPORT:	SERVICE LEVEL AGREEMENTS - UPDATE
ASSISTANT DIRECTOR PLANNING, PERFORMANCE AND DEVELOPMENT	CHRISTOPHER BAIRD

Wards Affected

County-wide

Purpose

To update Schools Forum on the progress in developing Herefordshire's use of service level agreements and buy-back between schools and Council services.

Key Decision

This is not a Key Decision.

Recommendation(s)

THAT Schools Forum notes the progress thus far and comments on the proposed developments over this financial year

Key Points Summary

- In 2008/09 officers worked with a group of head teachers to update the information contained in Service Level Agreements (SLAs) between schools and a range of Herefordshire Council corporate and Children and Young People Directorate Services. A revised SLA booklet was issued to all schools in 2009 to enable schools to be clear about what services were being provided, the standards to which the services should operate to, and the contacts for schools to use. The SLA booklet also set out school responsibilities from a service perspective.
- Schools Forum were consulted and made recommendations about the work, the proposed timetable and next steps. These next steps included taking into account any feedback from schools regarding the first year of the new SLA booklet being in place and also the introduction of a revised charging process to cover 2010/11 financial year.
- This report updates Schools Forum on the work of officers and the proposed process in

Further information on the subject of this report is available from
Christopher Baird, Assistant Director Planning, Performance and Development, 01432 260 264

readiness for the 2010/11 financial year.

Alternative Options

- 1 The requirements of the DCSF for Councils to delegate money to schools include the ability of schools to buy back a number of services that are often provided by Councils. Schools can choose to buy some services from other organisations. This alternative is currently in place and it is a matter for individual schools to decide on the most appropriate use of their delegated funding, whilst also ensuring that they fulfil all statutory requirements.

Reasons for Recommendations

- 2 Progress has been made over the last year to make the SLA process more useful to schools and to the services that operate them. There is still work to be done, in sharpening the process, including more services within the SLA booklet; developing the charging mechanism and promoting the SLA process within schools so that it operates effectively and in a timely way. The proposals in this document continue the development of the SLA system in Herefordshire.

Introduction and Background

- 3 SLAs had not been updated in Herefordshire for many services since 2000, neither had the charging mechanism. Work in 2008/09 renewed SLAs for services that are required to be delegated to schools. A new booklet was issued to all schools that included up to date information in a completely new format. A group of head teachers provided a “touchstone group” to advise whether the new information and format would meet school requirements.
- 4 Feedback received has stated that the work thus far is an improvement and gives schools and services a clear picture of what is required, what is provided and to what standards and timescales. This could be refined and individual services are committed to responding to schools feedback on their individual service areas.
- 5 The following services were covered in the SLA booklet 2009/10:
 - Facilities Management
 - Human Resources
 - Legal Services
 - LMS Budget Support
 - Occupational Health
 - Payroll
 - Property Maintenance and Improvements
 - Risk Management and Insurance Services
 - Schools Library Service
 - Staffing and Appointments
- 6 A number of services including ICT and the Music Service issued their own SLAs alongside this booklet. It is the intention that as many services as possible can be included in the one booklet and also one process to make this aspect of business easier for schools to consider, administer and respond to. Work is taking place in a number of services to develop a delegation and charging mechanism, including the offer of support for a Virtual Learning Environment and ICT curriculum support. Proposals for the delegation of learning and behaviour support are being prepared for consultation with schools in spring 2010.

- 7 The development of the SLA system in Herefordshire proposed that a charging mechanism would be put in place for the 2010/11 financial year. Officers responsible for different corporate services have been working to assess whether the current charging model provides a reflection of true costs. It is clear from the work that some services are recouping costs that reflect the amount required to provide the service to schools. Other services, such as Human Resources and Payroll believe that the money received from schools does not cover the costs of providing the service. However it is proposed that the current formula for establishing charges to schools be continued for 2010/11. For most services this uses a fixed element and then a per pupil charge. Services such as ICT will continue with their existing charging mechanism.
- 8 In addition the Council, Primary Care Trust, and Herefordshire Hospital Trust are currently exploring a "Shared Services" initiative. This is looking to bring together a range of "back office" functions such as HR, payroll, property services together across the organisations. The aim is to provide an efficient and effective service that also makes the most of the resources available. The target to reduce costs is at the moment between £3.4 to £5m across the three organisations. This could have implications for services to schools and the costs when the new service arrangements come into effect. It therefore seems prudent to continue with the charging formulae in operation and review this for services and schools once the Shared Services programme implications are clearer.
- 9 The intention is therefore to issue schools with a revised SLA booklet in early spring 2010 with a form for schools to send back to Herefordshire finance indicating which services schools wish to buy back for 2010/11. This will need to be signed by both the head teacher and chair of governors. It will also be important that returns are completed and sent back promptly so that services can organise their business accordingly for the new financial year.

Key Considerations

- 11 The above paragraphs establish the key considerations. The head teacher touchstone group did discuss the varying understanding and use of SLAs amongst schools. Schools Forum may wish to advise how schools in general can be made aware of the developments that are taking place.

Community Impact

- 12 The SLA system affects the whole school community. A separate booklet will be produced for the two Academies since all services received by Academies must be charged. For all other state schools in Herefordshire some services are received at no direct charge.

Financial Implications

- 13 Current services subject to SLAs cover approximately £2 million worth of business. The developments of the SLA system in Herefordshire will increase schools awareness of the system and also enable schools to make positive choices about what they purchase.

Legal Implications

- 14 Delegation, buy back, service provision and the actions of schools should conform to statute and guidance.

Risk Management

- 15 The timetable for the revised SLA system places the burden of risk on the services since for 2010/11 schools will be informing of the services they wish to purchase at the end of spring 2010 right before the beginning of the financial year. This timetable will be revised in future years, coinciding with a development of the system and understanding of it that should enable schools to make informed decisions more confidently earlier in the preceding year.

Consultees

- 16 A head teacher touchstone group has provided advice at different points in the development of SLAs. Schools Forum has also previously been consulted.

Appendices

- 17 None

Background Papers

- None

MEETING:	SCHOOLS FORUM
DATE:	7TH DECEMBER 2009
TITLE OF REPORT:	PURCHASE EDUCATIONAL DIGITAL CONTENT FOR ALL SCHOOLS TO “PRIME” THE VIRTUAL LEARNING ENVIRONMENT (VLE)
ICT ADVISOR	MARK SANDERSON

CLASSIFICATION: Open

Wards Affected

County-wide – All Schools

Purpose

To request one-off funding allocation of £354,932 for the purchase of digital content to “prime” the Virtual Learning Environment (VLE) and to secure best value through county wide purchase for all schools (2 year license)

Key Decision

This is not a Key Decision.

Recommendation

That School Forum Approves the funding request of £354,932 from DSG under-spend 08/09 to facilitate the purchase of online digital educational content as outlined below.

Key Points Summary

The Local Authority has a statutory duty to ensure pupils have access to learning outside the classroom through a VLE. The purchase of high quality online digital educational content available for all schools will:

- a) Incentivise schools to fulfil their obligations with regard to the provision of learning outside their classrooms.
- b) Make the Virtual Learning Environment (VLE) irresistible for all pupils and teachers

- c) Provide them with high quality resources - that have been chosen for their suitability for learning at home as well as at school- fully embedded and functional within their particular learning platform (LP).
- d) Bring huge financial savings for schools compared with individual purchases (currently made by 98% of primary schools)
- e) Enable a more effective whole LA approach to training and support with excellent integration into the learning platforms across the county.
- f) Further background can be found in the accompanying document *A Possible way forward for a Virtual Learning Environment in Herefordshire Schools (November 2009)*.

Alternative Options

- 1. That we continue to leave the purchase of digital content to individual schools. This is not the preferred option as it is not cost effective and does not encourage schools to meet their obligations regarding extended learning

Reasons for Recommendations

- 2. We need to take positive steps to ensure that a VLE is a highly useful tool used by all schools to facilitate extended learning opportunities
- 3. The government has invested substantially in such technologies and there is an expectation that all schools will have such an environment in place. Providing high quality digital educational content, properly embedded in the VLE is a key way in which we can achieve this.
- 4. The majority of our schools already subscribe individually to much of the content outlined below. Switching to a bulk, county-wide purchase brings considerable savings for all schools (more than £260,000 see costings below).
- 5. A bulk LA purchase of this content also means that we can expect total compliance from the providers to ensure that their content works effectively within our preferred VLE.

Introduction and Background

- 6. **National Background** We are in the middle of a 3 year DCSF / Becta programme (supported by £639.5 million of standards grant funding) entitled *Harnessing Technology*. The DCSF has allocated over £3.6 million across three years (2008-11) to Herefordshire Schools to ensure key priorities are addressed in using and applying technology to help support personalisation, closing the attainment gap and the move towards universal access to technology.
- 7. Local authorities have the responsibility (and the funding) to ensure that a learning platform is made available to their schools. The Government's e-strategy sets the expectation that:
 - by spring 2008 every pupil should have access to a **personalised online learning space** with the potential to support an e-portfolio (provided by their local authority)

- by 2010 every school should have **integrated learning and management systems** (a comprehensive suite of learning platform technologies).
8. DCSF requirements of schools / LAs further states that this learning platform should include:
- **tools** - for monitoring and assessing, communication and collaboration, eg email, forums wikis, blogs, and for creating, developing and managing digital content
 - **an individual area** for each learner (and member of staff) where they can store their work and personalise its layout to meet their needs
 - **safe and secure**, anytime / anywhere access to learning resources.
9. Virtual learning environments, such as the It's Learning solution are specifically specified by Becta and designed to provide this functionality.
10. **Local Background (Herefordshire)** There is a need to take positive steps at LA level to provide greater opportunities for every child to access learning outside the classroom. All schools are at different stages of this development with many smaller schools not having the resources to populate their VLE effectively. The content provided will enable all schools to give access to their pupils to first class learning resources.

Key Considerations

11. **Digital Content:** A learning platform, whilst it has many tools to help learning,, it does not include very much stimulating content. Some can be found for free eg from the BBC, but most of the really exciting and desirable content must be purchased separately. All publishers of quality content have been working hard to ensure it is ready to be embedded into the VLE. It is far more accessible and flexible that way.
12. Many authorities have used some of the 25% retained funding recommended by the DCSF to make bulk purchases on behalf of their schools.

Local authorities are able to retain up to 25 per cent (or more with the explicit agreement of their Schools Forum) of their allocation centrally to undertake collaborative purchasing on behalf of all schools where improved value for money can be achieved. ... With the agreement of schools in their area, local authorities can retain a further proportion of the funding where there is evidence that this will achieve efficiencies from collaborative approaches to procurement such as regionally or local authority wide deployed learning platforms where the majority of local authorities have secured improved value for money.

(Becta guidance)

13. The decision was taken 18 months ago in Herefordshire to devolve the entire grant to our schools. This has given schools greater autonomy but it has not resulted in best value for money. The county has very good infrastructure to all the schools, but it is not used to support learning as effectively as possible across the LA. At present, it is planned for the final year of the grant (2010/11) to be devolved as well. An effective use for some of the under-spend would be to purchase subscriptions to high quality digital content for all schools. This will both serve to “prime the pump” making the VLE irresistible to schools and enable us, as an

authority, to secure substantial discounts on the prices that schools would be paying (and in many cases already are paying) for this content if they purchase individually. (See costings below: **a total LA spend of £336K brings a net saving of £264K**). Notes on proposed individual content follow:

14. **ESPRESSO:** All but 3 primaries already subscribe to this. It is excellent quality and includes a vast quantity of video based content, generally regarded as the best of its type. We have negotiated the best discount we can with Espresso over the last few years; a county purchase will give a better deal still. We have met with Espresso and they have agreed to refund all remaining individual school subscriptions if we take out a county wide implementation of the product. This will be a substantial selling point with primary schools for the VLE. Again, the content will be much more versatile once embedded in the VLE (children can only get home access that way).
15. **CLIP BANK:** This is Espresso's secondary solution. Very similar to the above it style but obviously with content appropriate for KS3 & 4. Currently only one high school subscribes. Others have held off over the years because of cost and we have tried (at their request) several times to find a way to a county wide implementation of this for. Considerable savings would be achieved through a LA purchase (see below). Almost all secondary teachers who see this resource want it, the cost has always been the prohibiting factor at management level. It will be possible to integrate this content into all the VLEs already in use in our secondary schools.
16. **EDUCATION CITY:** We are currently working with this company and schools have a free trial of the product which has now been extended to the end of the autumn term pending a decision from Schools' Forum. The idea behind the trial is to try to coordinate a bulk purchase and so achieve a discount for schools (in reality we will only manage 25% - a county wide purchase will bring 50%). This is a vast collection of 10 minute "games" covering English, Maths, Science and PMFL. It is aimed at primary, early secondary and secondary SEN. One of its great strengths will be as a homework resource: it is very engaging for children. There are considerable advantages to using this product embedded in a VLE, most especially that the product will then track individual progress and allocate reinforcement activities where appropriate (precisely what a VLE is about). Schools are already giving very favourable feedback to the trial and many have already placed orders (now on hold).
17. Again, we have held negotiations with Education City and we have an acceptable way forward for reimbursing schools that already subscribe. Our relationship with the company, and therefore the support we can expect from them will be considerably enhanced by a bulk purchase. The terms of the contract we propose with Education City include free full integration into the VLE - this work would normally cost £5000 (no payment for the content until this is achieved), free training for schools, and several other benefits.
18. **E GADGETS (Lancashire Digital):** Teaching content in the form of readymade interactive whiteboard files that run in Actilnspire (the whiteboard software in all our primary schools). We demonstrated these at the last ICT coordinators' conference.
19. **MY MATHS (mymaths.co.uk):** a well respected and established platform that extends any VLE by giving access to structures quizzes, games and activities to improve the numeracy of all pupils and students. This is highly regarded by secondary schools at the moment and many primary schools are beginning to use this resource to boost the attainment of all KS2 pupils. Again, this is a resource that engages children and will therefore be of benefit for out of school learning.
20. **The Future:** The proposals for content above are for 2 year licenses. It is not possible at this

stage to know what funding will be available to schools for ICT beyond the life of the current funding stream, (the *Harnessing Technology Grant*). There has been a constant succession of standards funding for ICT to schools since 1997 and such funding streams have always included an element of retained funding by LAs or the ability to “top-slice”. Given the uncertain future of public funding streams it is particularly difficult to predict what might happen. If the possibility does not exist in the future for LA purchases then the next best thing will be for us to revert to purchasing on schools’ behalf. Hopefully the “pump priming” will ensure that schools wish to continue using the resources in question. They all have a very good returners rate with schools.

Community Impact

21. A VLE is about “any time any where learning” it means that students can access work started in school, out of school and that teachers can produce content (electronic) to extend children’s learning more effectively to anywhere outside school. It is also about parental engagement with children’s learning and improving communication between school and home. All of this will only happen if schools and teachers engage properly with this new and exciting technology.

Financial Implications

22. The table below is based on costings provided by the content providers and includes a comparison between schools purchasing individually and a bulk LA purchase.
23. Special schools have been deemed primary, this is not actually the case for all of the content below, this will not have a significant impact on the costings.
24. Many schools already subscribe to some of the content below and a refund will be due to them for the remaining time on their contracts. This will be dealt with on an individual basis by the content providers.
25. All licences are for 2 years to overcome potential revenue / capital issues.

	NOR	Primary + Special (85)	Secondary (14)
	£	12,373	£ 9,208
Education City (2 year)			
LA purchase *	£	100,251	£ 13,034
School purchase *	£	200,502	£ 26,068
Difference	£	100,251	£ 13,034
Espresso (2 years)			
LA purchase *	£	132,984	
School purchase *	£	163,755	
Difference	£	30,771	
Clip Bank (2 years)			
LA purchase *			£ 84,000
School purchase *			£ 128,100
Difference			£ 44,100
E-gadgets			
LA purchase *	£	3,000	
School purchase *	£	78,540	
Difference	£	75,540	
MyMaths (2 years)			
LA purchase *	£	16,632	£ 5,031
School purchase *	£	18,480	£ 5,590
Difference	£	1,848	£ 559
Total LA spend (prim / sec)	£	252,867	£ 102,065
Total LA spend (all phases)	£	354,932	
Total school spend	£	621,035	
Total Saving	£	266,103	

* **LA purchase** = central purchase for all school, **School purchase** = the same purchase by schools individually

26. Training and support for the above for primary schools will form a part of the general offering to them under the *Hands on Support* SLA. We are already working with Espresso to bring the annual training that schools currently receive for this product from free lance trainers "in house".
27. Secondary school training and support for Clip Bank will be provided by Espresso. Three two

hour training sessions per school (in school) for the two years of the contract are included in the price above.

Legal Implications

28. None known.

Risk Management

29. There are no known risks at this stage

Consultees

- 30. Meetings have been held with Espresso, Education City and It's Learning. Proposals and costings in this document are based on the outcomes of those discussions.
- 31. A number Head teachers and ICT coordinators have been consulted directly.
- 32. The attached document *A Possible way forward for a Virtual Learning Environment in Herefordshire Schools* has been circulated to all schools and to members of Schools' Forum.

Appendices

A Possible way forward for a Virtual Learning Environment in Herefordshire Schools – November 2009.

Background Papers

None

A Possible way forward for a Virtual Learning Environment in Herefordshire Schools



November 2009

Mark Sanderson - Primary ICT Adviser
23/09/2009 (Updated 03/11/09)

In Brief:

Nationally:

- On line learning now needs to be a reality for all schools.
- Local authorities are responsible for ensuring that a learning platform is available to their schools (that responsibility has now been met)
- and that “by 2010 every school should have **integrated learning and management systems** (a comprehensive suite of learning platform technologies).”

In Herefordshire:

- Many of our primary schools are some way from reaching the national expectation
- Local difficulties with the roll-out has meant that the VLE was viewed with a high degree of negativity by many Herefordshire primary schools - not in their best interests. This is changing as we work with staff and children in schools.
- Primary and secondary schools are now at various stages of implementation and have taken different routes.
- So far 50 of our 81 primary schools are using the Netmedia / It's Learning VLE, only 3 secondary schools are using the Netmedia product (the other 12 are using other platforms)

Putting this right

- We all need to be positive about this technology and embrace it within the work of the School Improvement Service where ever possible.
- We should support all schools and unite them behind the Netmedia / It's Learning product.
- We should consider the use of some of the under spend on DSG to provide some first rate content for the VLE to make it irresistible to schools

- Support (training) for the VLE needs to be brought “in house” and delivered as a natural part of our offering of *Hands on Support* (curriculum support) for all schools.
- Consideration needs to be given to the central hosting of Sims to meet the priorities of the *Harnessing Technology Grant* (eg online reporting).

Taking forward the Virtual Learning Environment (VLE) and ICT Curriculum Support in Herefordshire Schools from 2010

National Background

We are in the middle of a 3 year DCSF / Becta programme (supported by £639.5 million of standards grant funding) entitled *Harnessing Technology*. The DCSF has allocated over £3.6 million across three years (2008-11) to Herefordshire Schools to ensure key priorities are addressed in using and applying technology to help support personalisation, closing the attainment gap and the move towards universal access to technology.

This is the latest in a long succession of standards grant funding to schools for ICT, each with specific guidance and each building on the last (previous core initiatives have been the *National Grid for Learning* and *ICT in Schools*). This is entirely a capital grant. Previously, local authorities were required to provide revenue match funding for the national digital infrastructure grants. There is no match funding requirement associated with the *Harnessing Technology Grant*. However, it is recommended by DCSF that local authorities contribute revenue funding in line with previous years.

Local authorities have the responsibility (and the funding) to ensuring that a learning platform is made available to their schools. The Government's e-strategy sets the expectation that:

- by spring 2008 every pupil should have access to a **personalised online learning space** with the potential to support an e-portfolio (provided by their local authority)
- by 2010 every school should have **integrated learning and management systems** (a comprehensive suite of learning platform technologies).

DCSF requirements of schools / LAs further states that this learning platform should include:

- **tools** - for monitoring and assessing, communication and collaboration, eg email, forums wikis, blogs, and for creating, developing and managing digital content
- **an individual area** for each learner (and member of staff) where they can store their work and personalise its layout to meet their needs

- **safe and secure**, anytime/anywhere access to learning resources.

A virtual learning environment (such as the Netmedia / It's Learning solution that has been selected in Herefordshire) is the only obvious solution that provides all of this.

Local Background (Herefordshire)

There is a need to take positive steps at LA level to address the difficulties experienced in recent months with regard to a VLE / learning platform. This may be more easily said than done for some schools, however, and we need to take steps at LA level to ensure greater positivity of **all** schools and I propose the following (which is explained more fully in the remainder of this document):

- That we need to have **separate strategies for high schools and primary schools**. The two phases are now moving down completely different paths and it will not be possible (certainly in the short term) to bring them back together.
- That we do everything in our power to **keep schools firmly on the Netmedia / It's Learning path**. (Currently almost all primaries, with the possible exception of the Fairfield pyramid, are either using Netmedia or nothing.)
- That we find LA funding to **purchase, for all schools, high quality digital content** to run within the VLE thus making it attractive to all schools.
- That **support (training) for the VLE be incorporated into our general pedagogical support** for ICT in schools (Hands on Support) as soon as possible, so that schools see it for what it is - integral to learning rather than an optional extra.

Netmedia / It's Learning

Herefordshire originally selected the Netmedia as its preferred platform. Netmedia has recently been acquired by It's Learning, a company with a long and established track record in this kind of technology. It's Learning has its own VLE Platform which, in our opinion, is vastly superior to Netmedia's product. We have therefore decided to migrate all schools to the It's Learning VLE. This is happening now, no further training will be provided for schools on the Netmedia platform and it is to the It's Learning platform that the remainder of this document refers.

The primary / secondary issue and the need for standardisation

In an ideal world we would have all schools on the same platform. The benefits of this are obvious. However, most of the secondary schools have, over the last year or so, chosen a different pathway and it is going to be difficult (if not impossible) to get them to change providers. We therefore need to find ways of making the It's Learning product attractive to primary schools whilst not disadvantaging the high schools.

It is crucial that we keep the primary schools together if we are going to be able to secure best value with VLE and content providers and be in a position to train staff and parents in using them effectively. A sufficiently positive response to Kathy Roberts' letter of 2nd September has meant that the decision has now been taken (06/10/2009) to renew the contract with It's Learning for a further 2 years and to continue to provide training and support for it from the School Improvement Service.

VLE License (paying for the platform)

Negotiations have been taking place for some time now with It's Learning. We are confident that we have secured the best price we are likely to achieve for the product. Currently the platform is funded for schools (until 31st December 2009). Schools will need to fund the license fee for themselves after this date. This would seem to be the best way forward; schools need to take ownership of the VLE for themselves and should be making a conscious decision to purchase. There are things we can do as a local authority, however to make it more attractive to them:

Content (and financing it)

A learning platform is precisely that, it does not include very much content. That is purchased separately. All publishers of quality content have been working hard to ensure their content is ready to be embedded into a VLE and generally speaking it is much more flexible that way.

Many authorities have used some of the 25% retained funding recommended by the DCSF to make bulk purchases on behalf of their schools.

Local authorities are able to retain up to 25 per cent (or more with the explicit agreement of their Schools Forum) of their allocation centrally to undertake collaborative purchasing on behalf of all schools where improved value for money can be achieved. ... With the agreement of schools in their area, local authorities can retain a further proportion of the funding where there is evidence that this will achieve efficiencies from collaborative approaches to procurement such as regionally or local authority wide deployed learning platforms where the majority of local authorities have secured improved value for money. (Becta guidance)

The decision was take 18 months ago to devolve the entire grant to our schools. This has indeed given schools greater autonomy but it has not necessarily resulted in best value for money. At present, this arrangement is also planned for the final year of the grant (2010/11). I understand that consideration has already been given to using some of the under spend on the Dedicated Schools Grant for ICT. A good use for some of that money would be to purchase subscriptions to content for all schools. This will both serve to "prime the pump" making the VLE irresistible to schools and enable us, as an authority, to secure substantial discounts on the prices that schools would be paying (and in many cases already are paying) for this content if they purchase individually. (See costings below: **a total LA spend of £355K brings a net saving of £266K**). Notes on proposed individual content follow:

Espresso

All but 3 primaries already subscribe to this. It is excellent quality and includes a vast quantity of video based content, generally regarded as the best of its type. We have negotiated the best discount we can with Espresso over the last few years; a county purchase will give a better deal still. We have met with Espresso and they have agreed to refund all remaining individual school subscriptions if we take out a county wide implementation of the product. This will be a substantial selling point

with primary schools for the VLE. Again, the content will be much more versatile once embedded in the VLE (children can only get home access that way).

Clip Bank

Espresso's secondary solution. Very similar to the above it style but obviously with content appropriate for KS3 & 4. Currently only one high school subscribes. Others have held off over the years because of cost and we have tried several times to find a way to a county wide implementation of this for schools as many secondary teachers are keen to have the product. Considerable savings for LA purchase (see below). Almost all secondary teacher who see this resource want it, the cost has always been the prohibiting factor at management level.

Education City

We are currently working with this company and schools have a free trial of the product which has now been extended to the end of the autumn term while negotiations take place. The idea behind the trial is to try to coordinate a bulk purchase and so achieve a discount for schools (in reality we will only manage 25% - a county wide purchase will bring 50%). This is a vast collection of 10 minute "games" covering English, Maths, Science and PMFL. It is aimed at primary, early secondary and secondary SEN. One of its great strengths will be as a homework resource because it is so engaging for children. There are considerable advantages to using this product embedded in a VLE, most especially that the product will then track individual progress and allocate reinforcement activities where appropriate (precisely what a VLE is about). Schools are already giving very favourable feedback to the trial and many have already placed orders (now on hold).

Again, we have held negotiations with Education City and we have an acceptable way forward for reimbursing schools that already subscribe. Our relationship with the company, and therefore the support we can expect from them will be considerably enhanced by a bulk purchase. The terms of the contract we propose with Education City include free full integration into the VLE - this work would normally cost £5000 (no payment for the content until this is achieved), free training for schools, and several other benefits.

E Gadgets (Lancashire Digital)

Teaching content in the form of ready made interactive whiteboard files that run in ActivInspire (the whiteboard software in all out primary schools). We demonstrated these at the last ICT coordinators' conference.

MyMaths (mymaths.co.uk)

A well respected and established platform that extends any VLE by giving access to structures quizzes, games and activities to improve the numeracy of all pupils and students. This is highly regarded by secondary schools at the moment and many primary schools are beginning to use this resource to boost the attainment of all KS2 pupils. Again, this is a resource that engages children and will therefore be of benefit for out of school learning.

Costings for proposed digital content (with comparisons between LA / school purchase)

		Primary + Special (85)	Secondary (14)
	NOR	£ 12,373	£ 9,208
Education City (2 year)			
LA purchase *	£	100,251	£ 13,034
School purchase *	£	200,502	£ 26,068
Difference	£	100,251	£ 13,034
Espresso (2 years)			
LA purchase *	£	132,984	
School purchase *	£	163,755	
Difference	£	30,771	
Clip Bank (2 years)			
LA purchase *			£ 84,000
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Difference			£ 44,100
E-gadgets			
LA purchase *	£	3,000	
School purchase *	£	78,540	
Difference	£	75,540	
MyMaths (2 years)			
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Total LA spend (all phases)	£	354,932	
Total school spend	£	621,035	
Total Saving	£	266,103	

* **LA purchase** = central purchase for all school, **School purchase** = the same purchase by schools individually

Training and Support (VLE and Hands on Support)

The time is now right to bring training support for the VLE into the general offering to schools (primary) made through what we are still calling *Hands on Support* (i.e. the support given by the ICT team within the School Improvement Service). It is not

appropriate for schools to look upon the VLE as an optional extra. We have a good reputation with our primary schools for delivering high quality advice and support for ICT in the classroom, bringing the VLE support into this would very quickly help the more reluctant schools to view the VLE more positively, especially when training in other aspects of ICT begins to involve the VLE (as it now should and will).

The whole issue of Hands on Support service level agreements needs to be looked at with some urgency and consideration given to bringing VLE support into this SLA.

It is difficult to see how schools will derive best value from a free lance trainer coming in to deliver VLE training in isolation. Indeed we are looking, as a team, to pull other aspects of ICT training (such as Espresso) "in house" at the moment. We are in a much better position to provide relevant training for schools because we understand (and often set) the rest of the ICT agenda and can integrate training.

Centralised hosting of SIMS

An important requirement of learning platforms (by 2010) is that data is automatically and easily transferable between it and the school's information management system. For some time now the possibility of centrally hosing schools' SIMS data has been considered, now would be a good time to move this forward as doing so would make the integration of the data much more straight forward.

Increasingly schools are using SIMS Assessment Manger to record pupil progress. One common criticism from teachers is that they cannot easily use this data at home. The hosting of the data on a server external to the school would simplify this whole process. There are additional benefits beyond this and proper discussions need to be held with ICT Services.

The future

The proposals for content above are for 2 year licenses. It is not possible at this stage to know what funding will be available to schools for ICT beyond the life of the current funding stream, the *Harnessing Technology Grant*. The fact is that there has been a constant succession of standards funding for ICT to schools since 1997 and such funding streams have always included an element of retained funding by LAs or the ability to "top-slice". Given the uncertain future of public funding streams it is particularly difficult to predict what might happen. If the possibility does not exist in the future for LA purchases then the next best thing will be for us to revert to purchasing on schools' behalf. Hopefully the "pump priming" will ensure that schools wish to continue using the resources in question. They all have a very good return rate with schools.

What happens now?

A business case based on the proposals in this document is being made to Schools Forum for consideration (alongside other proposals for the DSG under spend) at their meeting on 7th December. Representations can be made by schools to representatives on that body before the meeting. We will take the necessary action after a decision has been made to secure what content we can for schools.

MEETING:	SCHOOLS FORUM
DATE:	7 DECEMBER 2009
TITLE OF REPORT:	PROPOSED USE OF DEDICATED SCHOOLS GRANT UNDERSPEND – BUILDING SCHOOLS FOR THE FUTURE
ASSISTANT DIRECTOR PLANNING, PERFORMANCE AND DEVELOPMENT	CHRISTOPHER BAIRD

Wards Affected

County-wide

Purpose

To agree to use Dedicated Schools Grant (DSG) under spend to enable Herefordshire to make best use of any Building Schools for the Future programme initiatives and money, to improve educational provision for children and young people in Herefordshire.

Key Decision

This is not a Key Decision.

Recommendation(s)

THAT Schools Forum agrees to commit £500,000 to £700,000 to support Herefordshire's development of school provision through the Building Schools for the Future (or alternative) programme.

Key Points Summary

- Building Schools for the Future (BSF) is the national programme to rebuild and refurbish every secondary school in England to provide modern teaching, learning and extended services facilities fit for the 21st Century. The vision stretches well beyond the “traditional” boundaries of education and school function, to be at the centre of communities and the services that support them. The impact is designed not simply for secondary age schools and their pupils, but to benefit the other schools in the area (i.e. primary schools through enhanced opportunities for their pupils and staff), and the wider community.

Further information on the subject of this report is available from
Christopher Baird, Assistant Director Planning, Performance and Development, 01432 260 264

- The government has rolled out the BSF programme via a prioritised list. Herefordshire was not due to benefit from BSF till 2014 at the earliest. This was revised in 2009 and potentially Herefordshire could benefit from the programme at an earlier point. However, the dramatic changes to the world and national economy have brought the programme into question. Formally the DCSF have said that there are no current changes to BSF, but in other formal and informal communications it may be that BSF continues, but in a revised format including possible a change of name. Whatever detail emerges, local authorities are still being advised to prepare and plan for entry into the programme.
- Herefordshire does not currently have the resources identified to adequately prepare and manage a BSF programme which is significant in scope and intensity of work. The Children and Young People's Directorate is setting out the development of Directorate resources over the next three years, with the expectation that we will engage and deliver the BSF programme, alongside other school capital programmes. This is in the context of a Council requirement to plan for at least 5% year on year reductions to the Directorate budget. The Dedicated Schools Grant (DSG) under spend provides an opportunity to contribute to the significant costs that BSF incurs locally. Other local authorities have made use of significant funding from DSG to help deliver the programme. This under spend provides a very timely opportunity for Schools Forum to commit substantial funding to improve teaching and learning provision for children and young people in Herefordshire.
- Funding would be used to establish a BSF Programme team, in line with national expectations, but to use the money prudently to take into account of any changes in the programme itself as a new government term begins.

Alternative Options

- 1 Schools Forum can decide what amount to commit to the programme. The Forum could also decide not to commit any funding. However, there is an expectation locally and nationally that funding is pulled together from a number of different sources. Whilst also exploring funding via Council central budgets, Herefordshire's ability to respond and manage the BSF programme would be severely compromised if money from DSG were not also found.

Reasons for Recommendations

- 2 Herefordshire should establish a team to prepare for BSF programme. BSF is not simply a programme to rebuild and refurbish high school provision, but expects to deliver community transformation across the whole age range. Initial work is expected to develop a strategy for BSF and engage schools and communities. This should follow on from the work of the Herefordshire Schools Task Group, whose final report is being considered by Herefordshire Cabinet in November 2009. The Cabinet decision will provide the strategic framework for the development of education and learning provision in Herefordshire, something that the BSF programme will require.
- 3 The DCSF expects to approach Herefordshire in 2011/2012 and expects that much of the preparatory work will have been done by then. The DCSF estimate is that for a £85 million project, the local area will have to spend c.£2.4m. However, other local authorities have found that costs on such a programme have actual been more in the region of £4.3m. Funding such amounts has proved a challenge for many areas, and a combination of DSG, Council funding and prudential borrowing has been used. The Directorate proposes to begin Herefordshire's approach through the appointment of a Programme Manager, with administrative support and then expand this as required. The DSG under spend provides an opportunity to "bank" some necessary funding for this development, which would provide a level of funding for Herefordshire

Introduction and Background

- 4 BSF is the Government's 10 to 15 year programme of rebuilding and refurbishing every secondary school in England to provide modern teaching, learning and extended services facilities fit for the 21st Century. It is not just about improving the fabric of school buildings, but aims to create transformational change to enable schools to deliver the whole Every Child Matters agenda. It aims to allow local communities, including primary age pupils to benefit from the improved resources and co-ordinated services that are expected to be delivered for children. The BSF programme also includes special schools catering for secondary age pupils and Pupil Referral Units.
- 5 Along with all local authorities, Herefordshire submitted an expression of interest for BSF to the Government in 2003 and was due to begin the programme in 2014 - 16. However, in 2008 the DCSF invited revised expressions of interest to be submitted by the end of November 2008 by authorities that had yet to enter into the programme for all their schools. Herefordshire submitted a revised expression of interest, following DCSF guidance, for an initial project covering six schools for a rebuild/refurbishment programme worth c.£80m and a follow on project for the remaining 11 schools (including three pupil referral units), totalling c. £100m.
- 6 The programme expects that around 50% of the combined floor area of the schools included in the projects will be rebuild, 35% major refurbishment and 15% minor refurbishment. The schools in this initial project were not required to be geographically coherent, but the project was required to aim for educational transformation and be an integral part of an overarching strategy for change for all secondary sector provision.
- 7 Each Local Authority's initial project, as detailed in their revised expression of interest submitted in November 2008, was assessed against the following criteria by Partnerships for Schools, the non-departmental public body set up to deliver the national BSF programme:
 - Social and educational need, including:
 - a. National Challenge schools;
 - b. less well performing schools;
 - c. areas of deprivation;
 - Building need, (suitability and/or condition);
 - Contributing to local or regional regeneration, including opportunities for co-location with other public services;
 - School reorganisation;
 - Sustainable communities, and new housing and population growth.
- 8 For educational need, the DCSF used as proxy the most recent data on the percentage of pupils in each school receiving 5 A*-C GCSE's including English and Mathematics. For social need the DCSF will now use the Tax Credit Indicator (TCI) rating for the school. The DCSF confirmed that school performance and social need were the key factors in determining the initial order for local authorities to enter the programme. Herefordshire was placed 63 out of 70 based solely on social deprivation and standards.
- 9 Further feedback from the DCSF and Partnership for Schools is that they aim for all Local

Authorities to enter into BSF in the next three to four years. The DCSF and Partnership for Schools are likely to contact Herefordshire within two years to assess Herefordshire's readiness to enter the BSF programme. Partnership for Schools will expect to see detailed evidence of Herefordshire's "Readiness to Deliver". This is a key stage of BSF that requires extensive and detailed planning and consultation with a range of interested groups, and includes:

- Early consultation with all stakeholders (both internal and external) concerning the potential BSF provides for education and community transformation.
- Robust pupil place planning at 11-16, 16-19 and special educational needs.
- Identifying both financial and human resources to provide the essential capacity required to deliver BSF to time and the requisite quality.
- Securing senior political and corporate support from across the Council.
- Early consideration of the likely issues that will affect delivery of BSF on existing sites (e.g. planning, choice of sample schemes etc.) or the logistics of the process for procuring new sites should this be necessary.
- Considering how the local response to the National Challenge relates to proposed BSF investment.
- Establishing and maintaining a dialogue with the Office of the School Commissioner.
- Aligning any statutory consultation, where there are clear school organisation issues, with the BSF project plan.
- Accessing the Expert Client Programme to develop capacity further, including undertaking a skills audit. The Expert Client Programme is currently provided by 4ps, the local government project delivery specialist body.

10 Partnerships for Schools will assess Herefordshire's readiness to deliver across all of the following key areas:

- The transformational overview
- Deliverability
- Investment Strategy
- Affordability
- Resources and Capability
- Benefits Realisation

11 The DCSF will expect that resources have been identified to deliver the programme. These are detailed under financial implications and cover a range of activities and specialist areas across Directorates in the Council. Initial work will require project development and management, in particular a fully resourced Project Board and Project Team, to include a full time Project Director (usually appointed at Head of Service level), Education and ICT leads, legal, financial, technical and procurement support together with plans for the leadership of PE & Sport and Culture and a Design Champion.

12 Herefordshire had carried out little work since its submission in 2003, due to the original BSF timescale for the county suggesting that work would not be required until closer to 2014 - 2016. There was also an expectation that the Schools Review of 2007/08 would establish a clear and sustainable direction for future secondary and associated special school provision in the county. The Herefordshire Schools Task Group has now establishing draft proposals for

the development of educational provision in Herefordshire and these are being considered by Cabinet in November 2009. The revised expression of interest submitted in 2008 was based on a discrete piece of work carried out by a consultant and consulted upon with schools. Though of high quality it was not extensive enough to fulfil the requirements of the DCSF Readiness to Deliver stage. Significant work is therefore still required.

- 13 Herefordshire does not have the capacity within existing resources to carry out the necessary preparatory work so that we can benefit from the BSF programme when contacted by Partnership for Schools in the revised BSF timetable. The DCSF and Partnership for Schools have recommended that we carry out the work required, and start as soon as practicable, so that we can speedily move through the Readiness to Deliver stage of the BSF programme when we are contacted.

Key Considerations

- 14 The above paragraphs establish the key considerations, alongside the community and financial sections below. The local authority is determined to make the most of any national programme to benefit the children and young people of Herefordshire and establish high quality, sustainable provision. This paper provides Schools Forum with an opportunity to contribute to this.

Community Impact

- 15 The delivery of the BSF programme in Herefordshire will deliver a number of strategic aims. Primarily it will provide a vehicle to support and enact the work that comes from the Herefordshire Schools Task Group and subsequent Cabinet decisions. It will also deliver aims contained in the Community Strategy, Local Area Agreement, and Children and Young People's Plan 2008 - 2011 as well as contributing to a number of other associated strategic plans and targets. The vision for BSF is transformational and from a Government perspective is hugely wide ranging and ambitious. A successful BSF project must have a strong emphasis on community use and extended school facilities. It must provide first class education facilities for students and provide assets for the wider community, serving the needs of adult education and community groups, particularly in the evenings and at weekends.

Financial Implications

- 16 Herefordshire's expression of interest covered an initial programme of c.£80m with a follow on programme, commencing possibly two to three years after the initial programme, of c.£100m. These are capital sums and the DCSF has been quite clear that this money must not be used for revenue funding.
- 17 There are revenue implications in terms of preparing and delivering the projects. As a general estimate being used by the DCSF, Local Authorities have had to commit the equivalent of around 3% of the capital figure as revenue to prepare and deliver projects. This equates to £2.4m for an initial £80m project and a further £3m for a £100m follow on project. However, feedback from Local Authorities in the BSF programme have confirmed that costs are much more than this, and that the true programme costs for a project is more likely to be c. £4 to £4.5m. The additional costs include the range of specialist posts the programme demands (indicated in paragraph 11) as well as other costs such as new roads, or access changes.
- 18 Local Authorities have set in place a variety and combination of funding sources such as prudential borrowing, use of Schools Budget, school balances and Council reserves to fund BSF. In Herefordshire we have begun to explore a range of funding streams. School balances have been investigated, but for the high schools and special school in the initial

expressions of interest these are already spent or committed, with the exception of John Kyrle High School, who stated at the time that they would be willing to contribute to the funding. Whilst very welcome this would release c. £100k, far short of the suggested costs. CYPD is working with the Director of Resources and the Chief Executive to assess the future requirements of BSF, in its current or future guise, and to explore different funding possibilities, including prudential borrowing.

Legal Implications

- 19 Any resources committed by Schools Forum would have to comply with financial regulations covering the use of under spend from DSG.

Risk Management

- 20 Risks associated with BSF are being considered by the Assistant Director for Planning, Performance and Development, the Director of Children's Services, the Director of Resources and the Chief Executive. Given the current financial climate the Authority is assessing the possibilities of any future BSF programme, the need to prepare alongside the need to make the best use of public finances. Schools Forum will be kept informed of the use of any money that is committed by the Forum to the preparation for this programme. Schools will be kept more generally informed of the BSF programme, opportunities and risk through the respective head teacher groups.

Consultees

- 21 Schools were consulted on the revised expression of interest in 2008.

Appendices

- 10 None

Background Papers

- None

MEETING:	SCHOOLS FORUM
DATE:	7 DECEMBER 2009
TITLE OF REPORT:	PROPOSED USE OF DEDICATED SCHOOLS GRANT UNDERSPEND – HEREFORDSHIRE SCHOOLS TASK GROUP (HSTG)
ASISSTANT DIRECTOR PLANNING, PERFORMANCE AND DEVELOPMENT	CHRISTOPHER BAIRD

Wards Affected

County-wide

Purpose

To agree to use Dedicated Schools Grant (DSG) under spend to enable Herefordshire to support outcomes from the work of the HSTG and to ensure effective and supported communication and consultation events to implement recommendations.

Key Decision

This is not a Key Decision.

Recommendation(s)

THAT Schools Forum agrees to commit £50,000 to support Herefordshire's implementation of the HSTG recommendations for the financial year 2010/11. Any unspent funds will be returned to schools or reconsidered by the Forum for the next year.

Key Points Summary

- HSTG has consulted upon and presented to Cabinet for consideration a number of proposals and processes designed to enable the development of a strategy to deliver quality sustainable models of schooling across the county.
- In order to design and implement such a strategy training, support, consultation events and cluster meetings will require coordination and facilitation. This will necessitate the release and cover of key school staff as well as the provision of venues / information and data to inform

Further information on the subject of this report is available from
Christopher Baird, Assistant Director Planning, Performance and Development, 01432 260 264

discussions.

Alternative Options

- 1 Schools Forum can decide what amount to commit to this support or schools can find funding for cover from within their budgets or through cluster agreement. However, the implementation of the HSTG proposals will be hindered if such activity is not agreed and supported.

Reasons for Recommendations

- 2 To enable Herefordshire to move forward on the recommendations of the HSTG as approved by Cabinet at their forthcoming meeting – 26th November 2009.

Introduction and Background

- 3 HSTG was tasked to develop processes and procedures through which Herefordshire could develop a strategy for the development and maintenance of high quality provision across the county.
- 4 The pressures of falling rolls has impacted upon funding for all schools and presents challenges in terms of sustainability and quality of delivery.

Key Considerations

- 5 This proposal invites Schools Forum to support full engagement in the implementation of the HSTG proposals.

Community Impact

- 6 The delivery of the HSTG proposals in Herefordshire will support the development of quality sustainable provision for the communities of Herefordshire. Primarily this support will facilitate representation from communities and cluster of schools to contribute to the development of delivery models.

Financial Implications

- 7 School staff that wish to engage in this development will need to commit time for this to be successful. Release of staff places additional pressures on schools. This funding will help to meeting and cover costs.

Legal Implications

- 8 Any resources committed by Schools Forum would have to comply with financial regulations covering the use of under spend from DSG.

Risk Management

- 9 HSTG proposals may be delayed in implementation if supportive funding cannot be made available and schools are unable to fund their own costs and the LA is unable to fund meetings.

Consultees

None identified

Appendices

None

Background Papers

- HSTG Consultation Paper for Cabinet- 26th November 2009.

MEETING:	SCHOOLS FORUM
DATE:	7TH DECEMBER 2009
TITLE OF REPORT:	IN-YEAR FAIR ACCESS SUPPORT
MANAGER OF SOCIAL INCLUSION	DENNIS LONGMORE

CLASSIFICATION: Open

Wards Affected

County-wide – All Secondary Schools

Purpose

To request one-off funding allocation for the support of children and young people who are placed in secondary schools in emergency situations within the In-Year Fair Access Protocol, for example, permanently excluded students or those subject to a managed move to avoid a permanent exclusion or as a result of an out of county Looked After foster placement. Such funding would enable the running of a pilot to assess the effectiveness of support for students in these circumstances.

Key Decision

This is not a Key Decision.

Recommendation(s)

THAT School's Forum approve:

the funding request of £20,000 from DSG underspend to enable targeted support be made available to schools to better meet the needs of vulnerable students when transferring to new high schools as part of the In-Year Fair Access Protocol.

Key Points Summary

In greater detail, the funding would:

- Enable Herefordshire Children's Services to further support high schools in the management of students who require a fresh start via a managed move or an exceptional placement within the In-Year Fair Access Protocol. Students that may benefit from a managed move are likely to be vulnerable youngsters with behavioural, emotional and social needs and may be facing possible permanent exclusion. Other students that may require an exceptional placement may include Looked After Children suddenly placed in Herefordshire in response to their social situation.

Further information on the subject of this report is available from
Dennis Longmore, Manager of Social Inclusion on 01432 260816

- Provide targeted support to vulnerable students.
- Help to reduce exclusions.
- Encourage schools to engage in the managed moves process.

Alternative Options

1. This is a one-off request to be set against DSG underspend in order to assess the effectiveness of a one year pilot to support students placed in schools in emergency situations.
2. If funding is not made available then it would put at greater risk the good practice of placing vulnerable students in new schools, in moments of crisis and there would be a greater likelihood of these school placements breaking down. For students to benefit from such placements, most of them would need some level of additional support.
3. If the pilot is assessed as being effective then Improvement and Inclusion will look to sustain such improvements from 2011 onwards, for example by considering prioritising monies from other budget areas like the Vulnerable Children budget. Other sources of funding would have to be considered.

Reasons for Recommendations

4. Vulnerable children and young people continue to be the highest priority for the Government and the DCSF and feature in all inspections of schools and local authorities. As a local authority we have a duty to meet the needs of such students, including publishing an agreed In-Year Fair Access Protocol.

Introduction and Background

5. The DCSF support the use of managed moves in order to avoid permanent exclusion by providing a fresh start for troubled students. More details are available in ‘Improving behaviour and attendance: guidance on exclusion from schools and Pupil Referral Units’, DCSF updated annually.
6. In Herefordshire we have a system within the primary phase where there is an expectation that permanent exclusion will be avoided by use of managed transfers. Managed transfers are essentially managed moves within a local protocol. Such placements are now supported by the allocation of banded funding level 3. This has been a very successful strategy resulting in zero permanent exclusions from primary schools in 2008/9 and only one in 2007/8 (the year the approach was implemented).

	2007/8	2008/9
Permanent exclusions from primary schools	1	0
Managed transfers from primary schools	8	9

Further information on the subject of this report is available from Dennis Longmore, Manager of Social Inclusion on 01432 260816

7. With this strategy and funding request, we now have an opportunity to extend this good practice into the secondary phase.
8. A protocol will be developed to outline the detail of the use of this strategy. This will relate to the In-Year Fair Access Protocol.
9. For students that have received a permanent exclusion from school, to make the most of a fresh start in a new school, it is very likely that additional support will be required to ensure the best possible outcome.
10. The effectiveness of the In-Year Access support budget will be reviewed prior to the end of the financial year. The review will be conducted by the Manager of Social Inclusion with a written submission to the Assistant Director, Improvement and Inclusion.

Key Considerations

11. Vulnerable children and young people that may require additional support within the In-Year Fair Access process would include:
 - Permanently excluded students;
 - Students at risk of permanent exclusion and subject to a managed move;
 - Students placed in foster care away from their home area;
 - Students subjected to serious bullying;
 - Students in other exceptional circumstances.

Community Impact

12. None other than assisting with the stability of the school community.

Financial Implications

13. *Set-up and management of a budget to deploy support funding to schools:*

Management of the budget

- Managed by Manager of Social Inclusion;
- Monitored by Team Leader of Behaviour Team.

Costings:

14. Total £20,000.
 - Amount attached to each student/school – sliding scale between £1000 - £2000 depending on level of need.
 - The level of need, and therefore the amount of money allocated, usually to be discussed within Pastoral Support Plan meetings with recommendations being considered by the Team Leader of the Behaviour Team (TLBT) in discussion with relevant colleagues, for

Further information on the subject of this report is available from
Dennis Longmore, Manager of Social Inclusion on 01432 260816

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example the Social Inclusion Officer and other members of the Behaviour Team. The TLBT will determine amount offered to new school. In some exceptional cases, the Manager of Social Inclusion will determine the level of funding deployed.

- In those cases where a CAF/TAC is in place for a student, this may be the forum for discussing these issues as well as monitoring progress.
- Amount agreed by the TLBT will be transferred to school budget.
- Deployment of support and spend monitored within the school's PSP meetings. A written submission outlining spend to the TLBT.
- TLBT to receive monthly financial (Cedar) report

What can the money but spent on?

15. This would be dependent on the needs of the student and the internal support systems within the school. Below are some possible uses:
- Deployment of a Teaching Assistant
 - Assist with applied learning placements;
 - Transport to applied learning placement;
 - Resources;
 - Training.
16. The above list is only indicative. The allocation could theoretically be spent on anything agreed within the PSP group as being effective, useful support.

al Implications

17. The local authority has a duty to assess and meet the needs of vulnerable children and young people.
18. In addition, schools must, by law have regard to the DCSF guidance, Improving Behaviour and Attendance (2008) which suggests managed moves as an alternative to permanent exclusion of students.

Risk Management

19. There are no risks identified with this proposal.

Consultees

20. In compiling this report the Manager of Social Inclusion consulted with other colleagues with the Children and Young People Directorate.

Appendices

None

Background Papers

In-Year Fair access Protocol

Further information on the subject of this report is available from
Dennis Longmore, Manager of Social Inclusion on 01432 260816

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17th Nov 2009

MEETING:	SCHOOLS FORUM
DATE:	7TH DECEMBER 2009
TITLE OF REPORT:	ESTABLISHING NURTURE GROUPS IN PRIMARY SCHOOLS & DEVELOPING AN APPROPRIATE SUPPORT NETWORK
SECONDARY SCHOOL IMPROVEMENT MANAGER	PAUL MURRAY

CLASSIFICATION: Open

Wards Affected

County-wide – All Schools

Purpose

- To fund the implementation of five trial Nurture Groups to be established in five Herefordshire Primary Schools
- To support the implementation of these five Nurture Groups and to facilitate development, networking and ongoing support for the five groups as well as the recently-established trial group.
- To monitor and assess the applicability of Nurture Groups as a means of meeting Additional Educational Needs in Herefordshire

Key Decision

This is not a Key Decision.

Recommendation(s)

THAT School Forum is asked to: approve the funding request of £100,000 from DSG to facilitate the implementation of Nurture Groups for 2010-11 only. Schools will require an exit strategy to mainstream their provision and ensure its sustainability.

Key Points Summary

- This intervention will enable five primary schools to trial a **Nurture Group** intervention for one year by providing resources (to be matched by the school) and provide guidance and support to schools. Nurture Groups provide a secure and reliable small class setting where children can

Further information on the subject of this report is available from
Paul Murray, Secondary School Improvement Manager on (01432) 260823

learn by re-experiencing pre-school nurture from two caring adults who actively work towards enabling their successful resettlement into their mainstream class

- Nurture Groups are proven interventions which are successfully operating in at least 83 Local Authorities. In Herefordshire the first supported Nurture Group became operational in October 2009. The proposal is to build on this by establishing 5 further groups all of which will run according to the 'Classic Nurture Group Model' which has proven effectiveness. Early intervention for children with emotional/behavioural needs has been proven to markedly reduce the need for subsequent interventions.
- Research suggests the establishment of effective nurture groups requires good support. The intention is to grow a network of support so that schools implementing nurture groups may aid each other, and to offer external monitoring and support from the Educational Psychology Service. This would include support in the area of monitoring individual children's development and progress in order better to meet their developmental needs.

Alternative Options

- 1 The alternative to promoting group interventions for meeting Additional Educational Need (AEN) is to continue to make a series of reactive individual interventions for children which can be very resource-heavy and piecemeal. A group intervention such as a Nurture Group offers a proactive and structured way of meeting children's needs. It also promotes early intervention.

Reasons for Recommendations

Why Nurture Groups?

- 2 By implementing a move to delegated SEN Banded Funding at levels 1 & 2, Schools Forum was responding to the need to help schools make a more flexible response to children with Additional Educational Needs. It enabled the emphasis to shift (where appropriate) from *individual* interventions to interventions for *groups* of children.
- 3 In many authorities, Nurture Groups are a proven group intervention. Their aim is to recreate normal development patterns, by identifying gaps and following a reliable predictable structure so that the children feel safe and begin to trust, explore & learn. The underlying principle is that the child will be responded to at whatever developmental stage they are at presently. Support develops positive emotional and social growth and cognitive development. Measured effects include increased social and communication skills, enhanced self esteem and increased preparedness to learn. Children attending the Nurture Group will have been identified as having additional needs and are likely to be at School Action + or Early Years Action + of the Code of Practice for Special Educational Needs.

Introduction and Background

What is a Classic Nurture Group?

- 4 There will usually be between 8-12 children in the group at any one time. No children from other schools attend the nurture group. The group is staffed by two adults. Children spend time in the group and time in their mainstream class. Typically, mornings are spent in the nurture group and afternoons in the mainstream class. The group meets in a safe comfortable base in which they eat, play and work together. Ideally the room should be set aside for this purpose. In this secure and reliable small class setting, children can learn by re-experiencing

pre-school nurture from two caring adults who actively work towards enabling their successful resettlement into their mainstream class

How can schools be supported?

- 5 Herefordshire seeks to promote the establishment of nurture groups but recognises the support individual schools might require in setting these up. By promoting the establishment of five nurture groups at the same time it is hoped to establish a mutually supportive resource network. It is also possible to offer joint initial training and ongoing training.
- 6 The 'Classic Nurture Group' model requires that individual children are regularly monitored, or *profiled*, so that their development can best be supported. Over the last thirty years appropriate profiles have been developed and proven. Support from the Assistant Psychologist will be available to schools to enable children in the nurture group to be monitored in this way. Educational Psychology Support will also be provided to support Nurture Group leaders. Quality Assurance will be supported by participation in the National Nurture Groups Quality Mark scheme.

How will participating schools be identified? How will Nurture Groups be taken forwards?

- 7 Schools will be invited to put themselves forwards. Priority will be given to schools where there is an established range of Additional Educational Need in this area. Schools will also have to be able to access appropriate, discrete physical space for a Nurture Group. As the intention is to establish the benefits and appropriateness of Nurture Groups for Herefordshire schools, selection will take into account the need to include a range of schools with differing characteristics.
- 8 The use of DSG underspend funding is for one year only. Individual schools will have to identify a clear exit strategy from the onset. This may, hopefully, involve mainstreaming the classic Nurture Group model within the school from internal funding. Some schools may not be able to resource at this level and may choose to develop future interventions which are informed by nurture group principles and which utilise the staff skills developed.

Key Considerations

- 9 Centres identified to receive the development funding would need to consider planning for sustainability.

Community Impact

- 10 The communities identified to receive to develop the projects will benefit from additional resource and expertise. Should the model be successful there would be a need to consider sustainability options. These communities not identified for the projects would be invited to learn from the evidence gathered. This could then inform potential future project development.

Financial Implications

Funding to 5 Herefordshire Primary Schools to Implement Nurture Groups:

- 11 Purpose of Additional Funding:
- Support the costs to schools of Nurture Group Staffing
 - Support the set up costs to schools including limited room refurbishment and set up equipment
 - Establish a small, central Resource Bank to support schools
 - Provide
 - Training for colleagues Staffing Nurture Groups
 - Training for colleagues managing Nurture Groups
 - Briefing for the whole staff of schools implementing nurture groups
 - Structured networking opportunities for colleagues
 - Opportunities for dissemination of good practice to other schools

Resources required but not provided for by this Additional funding

- 12 In support of this additional funding schools will have to provide
- Additional Financial Resources in order to meet the costs of the Nurture Group
 - Management time

13 Costings:

Background:

Typical Nurture Group Costings

	£
TA Staffing including oncosts	20870
Room refurbishment & Set Up Equipment	1500
SENCo or other Management Time (variable)	-----
Training (staff time)	<u>470</u>
<u>Typical Total</u>	<u>22840</u>

NB This is a typical costing and will vary from school to school. It assumes management time can be provided from within the school's existing resource allocation. It assumes staff at SEN1. If schools employ staff on SEN2 then staffing will be 6% higher. Set up costs too will vary from school to school.

	£
Costings for this project	
Support at £19.600 per school x 5	97500
Educational Psychology Support	-----
Resource Bank & Online Subscriptions	570
Training (incl network meetings)	<u>1930</u>
Total	<u>100,000</u>

NB Educational Psychology time to be provided from within the service's current resources.

Legal Implications

14. There are no Legal Implications identified at this stage.

Risk Management

15. Exit strategies would need to be planned to ensure minimal impact upon settings once funding ends.

Consultees

16. There are no consultees to identify.

Appendices

None

Background Papers

None

MEETING:	SCHOOLS FORUM
DATE:	7TH DECEMBER 2009
TITLE OF REPORT:	DEVELOPING EARLY INTERVENTION FOR CHILDREN AT KS2 IN HEREFORDSHIRE
LEADER – SCHOOL BASED INTERVENTION PROJECT	BERNARD HODGKIN

CLASSIFICATION: Open

Wards Affected

County-wide – All Primary Schools

Purpose

To enable Herefordshire Local Authority Improvement and Inclusion Service (to emulate the School Based Intervention project currently in Herefordshire High schools) at KS2, by establishing School based Intervention in all of the primary schools which have at their heart the development of sound and lasting relationships.

Key Decision

This is a key decision because it is likely to be significant in terms of its effect on a large number of pupils at KS2 and their families.

Recommendation(s)

THAT Herefordshire School Forum:

- (a) **approve funding for £325,000 from DSG underspend to facilitate the development of Intervention strategies with children at KS2.**

Key Points summary

- Raise aspirations and having high expectations for all students
- Develop children's confidence to learn
- Enable children to develop the relevant skills to access a relevant curriculum
- Give children an understanding of the positive concept of personal achievement

- Ensure a cohesive approach through the development of effective partnership working both within and between schools, between schools, parents and carers and between schools and other agencies
- Develop a sustained programme of Continued Professional Development for both school and relevant multi-agency staff
- Effect change in the way the school community meets the needs of its students
- Embed the principles and practice of intervention to enhance Inclusion
- Create the environment for the sustainability of this initiative
- Develop appropriate provision as designed by school or cluster.

Alternative Options

- 1 The Alternative option to the proposal is to introduce the above project as a scheme to pilot in two clusters with a Co-ordinator assigned to each of the individual clusters,
- 2 The alternative option would inevitably be less expensive and be piloted initially for one year. The advantage of the alternative option would be to monitor effectiveness within a concentrated initiative, utilising the experience of the secondary pilot, including working with those secondary schools already operating a cross phase School based intervention programme.
3. Costings for Alternative option:

2x Intervention Co-ordinator for one year 2010-2011	£80,000
Travel	£2000
Admin costs	£19000
Additional Contingency	£2000
Total	£103000

Reasons for Recommendations

4. The particular focus of KS2 Intervention Centres will ensure
 - Earlier intervention to supplement the work of the SBIC's
 - Work directly with vulnerable groups
 - Support children requiring day 6 provision
 - Encourage partnership working
 - Reduce the instances of Persistent Absence
 - Directly enable the introduction of the new "Behaviour Challenge"
5. It will support the new demands made by the Behaviour Challenge:
6. On Wednesday 30 September 2009 the Secretary of State launched a new behaviour strategy to improve pupil behaviour in schools. The central elements of the behaviour strategy are:

7. The new Behaviour Challenge, through which schools that have only a 'satisfactory' Ofsted grade for behaviour will be encouraged and supported to work towards the 'good' or 'outstanding' standard making behaviour improvement a priority for the "Good and Great Schools" programme engaging parents through a new leaflet on how they can work with schools on pupil behaviour issues.
8. The Behaviour Challenge reflects a key recommendation of Sir Alan Steer's final report on behaviour standards and practices in schools (*Learning behaviour: Lessons learned*) in which he made clear that an Ofsted judgement of 'satisfactory' on behaviour should not be seen as good enough and should trigger additional support

Introduction and Background

9. The DCSF White Paper, 'Back on Track', was published in May 2008 and focussed on 'alternative provision' including the role of PRUs. Pertinent points from this include:
 - The strength of partnerships between schools and alternative providers is highlighted.
 - Partnership working should include Behaviour and Attendance Partnerships, PRUs, mainstream schools, Alternative Education providers, and local employers, as well as multi agency partnerships
 - Information sharing should be undertaken and data made available regarding prior attainment and 'case histories'. This should be realised in the form of PLP's, Information passports and supported with the use of the Common Assessment Framework
 - Intervention Centres in-school alternatives to exclusions will be developed and the Intervention Centres will retain a multi functional remit to work with individual pupils on a Social, Emotional and/or Behavioural programme, to enable individuals to work towards fully accessing an appropriate curriculum within school. Working alongside neighbouring primary schools will be crucial to this, in recognising particular specialism within each individual school.
 - There should be increased partnership working between services working with young people to facilitate early intervention and ensure an integrated approach.
 - There should be a greater differentiation of provision to meet the needs of all.
 - There will be a National Minimum Standard to include a minimum curriculum entitlement and number of hours in education and training

Key Considerations

- 10 It will support Herefordshire's Children Plan priorities under "Enjoy and Achieve to:
 - Improve the educational attainment of children and young people, particularly at KS2 reflecting national priority
 - To improve attendance.

Community Impact

- 11 The initiative will further support all five outcomes of the Every Child matters agenda, with particular emphasis on multi agency support and working closely with parents and

the wider community to challenge a variety of issues which create barriers to pupil learning at KS2,

Financial Implications

12 Costings

7x Intervention Co-ordinators, who will each manage two of the partnerships

7 x. £40,000 Salaries-Centre Managers

Inclusive of on costs) 2010-2011	£280,000
Resource costs (training materials, conference fees etc)	£ 4000
Travel Costs	£15000
Upgrading IT software	£3000
Administrators Salary	£19000
Additional Contingency	£4000
Sub total	£325,000
Funding request	£325,000

13 Funding will be devolved to the partnership clusters who will appoint the Co-ordinator in consultation with the Local Authority. Job specification will reflect the demands of the role

14 An Intervention Coordinator will be assigned to two of the fourteen location partnerships and will co-ordinate intervention in the primary schools across the cluster. As in the secondary model, Intervention will be school based and the programmes will be coordinated in consultation with the Secondary school Intervention centres The Intervention Coordinator, in consultation with a senior member of staff at the school will be responsible for the co-ordination and implementation of the School based Intervention programme as well as working with other agencies and co-ordinating external alternative education providers where appropriate. The Coordinator will also be responsible for admissions, protocols and common agreed practices among the centres as well as coordinating systems of information sharing and the sharing of expertise amongst the other school partnerships, and other agencies to support the needs of individual students. A central database of all children experiencing intervention through the Centres will be maintained. This data will provide the basis for reporting to identified agencies and will facilitate the measurement of impact. The co-ordinators will be managed in schools by the clusters.

Legal Implications

15 None

Risk Management

15 None

Consultees

16 In compiling this report Governor Services consulted with Herefordshire Association of Governors which includes an Executive Committee of many long standing and experienced Governors.

Appendices

None

Background Papers

DCSF "Back on Track" (2008)

DCSF The Steer report (2009)

MEETING:	SCHOOLS FORUM
DATE:	7 DECEMBER 2009
TITLE OF REPORT:	DEVELOPING READING RECOVERY IN HEREFORDSHIRE
GENERAL INSPECTOR PRIMARY STRATEGY	JANE CHURCHILL

CLASSIFICATION: Open

Wards Affected

County-wide – All Schools

Purpose

To request one-off funding allocation to enable Herefordshire Children's Services to set up and run a Reading Recovery Training Centre, to be based at Ledbury Primary School, in order for nominated teachers to be trained to deliver this intervention to the lowest attaining 5% Y1 pupils in Herefordshire.

Key Decision

This is not a Key Decision.

Recommendation(s)

THAT School Forum is asked to:

Approve the funding request of £50,000 from DSG underspend 08/09 as one off funding to contribute to the setting up of Reading Recovery Training Centre to enable the delivery of Reading Recovery from September 2010 as outlined below.

Key Points Summary

- To enable Herefordshire Children's Services to set up and run a Reading Recovery Training Centre in order for nominated teachers to be trained to deliver this intervention to the lowest attaining 5% Y1 pupils in Herefordshire and Worcestershire via a Consortium arrangement :
- To raise standards in literacy by specialist early intervention for the pupils with the greatest need:
- To improve the life chances of the lowest attaining pupils and to reduce the need for later SEN support, costs of truancy, exclusions and costs associated with unemployment, crime and poor health in adulthood.

Further information on the subject of this report is available from Jane Churchill, General Inspector Primary Strategy on 01432 260826

Alternative Options

1. This is a one off request to be set against DSG underspend in order to establish provision to deliver training for Reading Recovery.
2. Reading Recovery training can only be delivered in premises that meet specifications. Training for teachers to deliver this intervention would require weekly travel to established centre (nearest currently Bristol or Birmingham) which would be costly.
3. A centre in Herefordshire will reduce long term costs, and potentially generate income towards cost of training by charges to Worcestershire schools (to be agreed), or by reciprocal arrangement to train Herefordshire 'Every Child Counts' teachers in Worcestershire. Additional income to cover running costs and administrative support after set up year to be sought from lettings out of school time for organisations needing specialist facilities with observational mirror for training purposes (e.g. interviewing techniques, counselling, interrogation).

Reasons for Recommendations

4. Performance in Communication, Language and Literacy at Early Years Foundation Stage shows average scores below both national levels and that of statistical neighbours. Data from the PCT on speech and language referrals in Herefordshire indicates a sharp rise in transient speech and language difficulties in 2008-2009. National data (I CAN) indicates an increase in numbers of children starting reception with speech and language difficulties.
5. Analysis of performance of KS1 pupils shows a three year decline in literacy standards (both reading and writing), and results continue to be below the national average. Although standards are broadly in line with national results currently by the end of KS2, the increase of pupils with significant literacy needs will impact on later performance, and the cost of interventions throughout the education system, unless significant action is taken.
6. Reading Recovery is a proven intervention for the lowest attaining six year olds, to enable the majority of targeted pupils to reach age related levels. The training to deliver Reading Recovery is highly specialised and requires premises that meet standards set out by the European Centre for Reading Recovery at the Institute of Education.

Introduction and Background

6. Every Child a Reader (ECaR) is part of the government's Early Reading Strategy and is a key commitment in the Children's Plan. Early intervention and specialist provision for children with literacy difficulties is a key policy within the Every Child Matters and Personalisation agenda in the 2009 White Paper.
7. Herefordshire is the lead authority in a consortium arrangement with Worcestershire County Council for this initiative.
8. The programme would deliver the well evidenced Reading Recovery Programme to the lowest attaining 5% of Year 1 pupils. The programme has a proven track record of effectiveness for early intervention. Investment in Reading Recovery would help meet aims of CYP plan, reduce the cost of later interventions and most importantly improve the life chances of children and young people.
9. KS1 standards in reading and writing are on a downward trend, reflecting a growing need for intervention. Failure to intervene at this stage will impact on outcomes for children and young people throughout their school years and beyond.

10. Herefordshire LA already has a Reading Recovery Teacher Leader (RRTL) in training, part funded by Standards Fund grant. Worcestershire will have a second RRTL in training from September 2010.
11. The Reading Recovery Teacher Leader trains with the institute of Education to Masters Level, who then trains and coaches Reading Recovery teachers, initially in 20 schools across Herefordshire and Worcestershire, from September 2010. These teachers then deliver daily teaching for children with the most severe difficulties (30 minutes daily, over 4 months), and provide coaching, training and support to teaching assistants and other adults who deliver lighter touch interventions. The RRTL will have a local authority wide brief to improve provision for wave 2 and 3 interventions.
12. Worcestershire is a lead funded authority for a dual programme 'Every Child Counts' (ECC) and would thus train ECC teachers for Herefordshire in a reciprocal manner. This programme also funded from 2009, to prepare for implementation in September 2010. A steering group is to be set up across the two LAs to plan the strategic role out and implement the ECaR and ECC initiatives.

Key Considerations

Benefits of Reading Recovery

13. *Every Child a Reader: The results of the third year (2008) Pilot 2005-2008* indicate:
 - Rate of progress for children on programme averaged four times higher than average (21 months in 4 or 5 months). Gains maintained. 80% of targeted children with severe difficulties went on to achieve L2 at end of KS1. 54% attained L4 at end of KS2.
 - The programme shown to be effective in narrowing social class and gender gaps in attainment: children in the pilot were predominantly boys (63%) and poor (59% FSM)
 - KS1 standards (both reading and writing) rose in schools in other local authorities with ECaR, because of influence of skilled expert across schools.
 - Research suggests that each £1 spent on ECaR, has potential to save £15 on money that would otherwise be spent on SEN support, costs of truancy exclusions, costs associated with unemployment, crime and poor health in adulthood. (*The Long term Costs of Literacy Difficulties, Every Child a Chance Trust 2009*)

Community Impact

14. Improving outcomes for individuals with literacy difficulties will have a long term impact on communities. Research indicates that there is a significant link between poor literacy levels, antisocial behaviour, reduced work prospects and ill health. (*The Long term Costs of Literacy Difficulties, Every Child a Chance Trust 2009*)

Financial Implications

SETTING UP A READING RECOVERY TRAINING CENTRE:

15. Contribution to the building costs of a new build training and practice room, to the specification set by the European Centre for Reading Recovery at the Institute of Education. New build to be included in building work at Ledbury Primary School. Location of training centre chosen for geographical reasons, to be accessible to teachers in both Herefordshire and Worcestershire.

16. Costings:

CENTRE

Specialist one way mirror, including fitting	£11,000
Specialist furniture	£15,000
Interactive whiteboard, data projector, PC, sound system	£3,500
Books and resources	£ 5,000
Contribution to capital build costs for toilet / kitchen facilities for Centre	£10,000

Equipping the Training Centre for 2010/11 will put in the infrastructure for the long term development for Reading Recovery, and allow the training of teachers to begin. The building would remain part of Ledbury Primary School with the resources remaining the property of Herefordshire Council. Should the training centre prove not be economically viable in the long term, the resources / or value from sale would need to be re-distributed to schools.

ADMINISTRATIVE SUPPORT

Administrative Assistant – 12.5 hours per week, HC4 (term time only) x 38 weeks (for academic year 2010-11) 1 year fixed term contract	£5216
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Additional income to cover running costs and administrative support from 2011 to be sought from consortium partner and from lettings for out of school time use for this specialist training facility

TOTAL	£49,716. 00
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Funding request : £50,000

Risk Management

17. None

Legal Implications

18. No legal implications as yet but early intervention and specialist provision for children with literacy difficulties is part of the Pupil Guarantee, a key policy within the Children, Schools and Families Bill.

Consultees

19. In compiling this report the Local Authority consulted representatives from the National Strategies, the institute of Education and Worcestershire County Council.

Appendices

None

Background Papers

None

MEETING:	SCHOOLS FORUM
DATE:	7TH DECEMBER 2009
TITLE OF REPORT:	REPORT OF BUDGET WORKING GROUP - 25TH SEPTEMBER AND 13 NOVEMBER 2009
FINANCE MANAGER	MALCOLM GREEN

CLASSIFICATION: Open

Wards Affected

County-wide

Purpose

To consider the recommendations of the Budget Working Group in agreeing an initial budget for schools

Key Decision

This is not a Key Decision.

Recommendation(s)

THAT Schools Forum:

- 1. Agrees the continuation of the existing budget strategy**
 - a. **Minimum Funding Guarantee of 2.1%**
 - b. **Headroom distribution of 50% on pupil numbers and 50% social deprivation**
 - c. **Small Schools Protection remains frozen at 06/07 level**
- 2. Approves reductions to the following Central budgets for 2010/11**
 - a. **Academies – Individually Assigned Resources £106k**
 - b. **Contingencies £80k**
 - c. **Hereford LEA Swimming Pool £89.5k**
 - d. **Travellers' Children £14k**
- 3. Approves budget increases for 2010/11**
 - a. **Service Level Agreements - £70k to provide for a Governor Services SLA**
 - b. **SEN Banded Funding provisionally £260k for Bands 3 & 4**
 - c. **Pupil Referral Units provisionally £100k**

Further information on the subject of this report is available from
Malcolm Green on (01432) 260818

4. Approves the continued cash freeze of the PVI nursery budget until parity with Worcestershire, Shropshire and Gloucestershire is achieved
5. Approves the application of a budget abatement for schools with nursery classes in response to revised early years funding formula.
6. Approves the issue of draft school budgets before the end of term on the basis of the budget assumptions agreed by Forum

Key Points Summary

- The Budget working group proposes a continuation of Forum's existing budget strategy for 2010/11.
- Budget reductions of £289.5k are proposed
- Budget increases of £430k are proposed
- A continuation of the freeze in the budget for Private, Voluntary Independent nursery settings
- Agreement of the principle of a "fixed costs" abatement for schools with nursery classes on a similar basis to that applied for schools with sixth forms.

Alternative Options

- 1 Schools will need to absorb any reductions in DSG through lower pupil numbers if the current level of central budgets is maintained.

Reasons for Recommendations

- 2 Recommendations of the Budget Working Group from meetings on 25th September and 13th November 2009.

Introduction and Background

3. The Budget Working Group has met twice to consider the budget proposals for Dedicated Schools Grant (DSG) for 2010/11. A further meeting is planned for January 2010 to consider any further adjustments necessary before making final recommendations to Schools Forum at the meeting on the 23rd February. A brief summary of the discussions and recommendations from the first two meetings are set out below.
4. Schools Budget Strategy – the working party was reminded of the existing budget strategy
 - a. Apply Minimum Funding Guarantee increase of 2.1%
 - b. Amend the DSG central budgets for individual budget changes
 - c. Any headroom to be distributed to schools, half on pupil numbers and half on deprivation
 - d. Small schools protection remains frozen at the 2006/07 funding levels
5. Budget Adjustments - Forum requested that the Budget Working Group review the centrally held DSG budgets for 2010/11. Recommendations to Schools Forum were based on a full list

of central DSG budgets (attached as an Appendix) and budget adjustments were recommended as follows;

- a. Academies SEN funding– reduce by £106k in line with 2009/10 spend because the Academy will receive delegated banded funding from DCSF.
 - b. Contingencies – reduce by £80k as spend usually relates to funding for changes to special school pupils, with the remaining budget offsetting overspends on other central cost centres.
 - c. Hereford LEA Swimming Pool – reduce funding by £89.5k
 - d. Travellers' Children – reduce budget by £14k as costs will be lower in 2010/11 following termination if the West Midlands contract
 - e. Governor Services SLA – increase SLA budget by £70k to provide better support to governors.
6. Trade Union (TU) Facilities Agreement (£33k) - considered a report on the 13th November on the projected overspend of £30K in 2009/10 and the need for additional budget to cover the increasing cost and demand for TU meetings. The Working group considered that a more efficient arrangement for better co-ordinating TU representative meetings should be considered prior to any request for additional funding.
 7. Overhead Recharges (£340k) – details of the overheads of £901,000 (e.g. accommodation, ICT, reception, general administration, training, payroll) were presented. The overhead costs of Blackfriars were allocated in proportion to the staff funded by DSG (37%) and Local Authority (63%) giving an LA share of £569,000 and a DSG share of £332,000 in 2006/07. The apportionment was calculated in April 2006 when DSG was first implemented and has been inflated since.
 8. Early Years Services (£469K) – carried over to the next meeting on 22nd January 2010
 9. SEN Support Services (£1.5m)- carried over to the next meeting on 22nd January 2010
 10. PVI Nurseries (£3,575k) – School Forum has previously agreed to freeze the budget for PVI nurseries. It was felt that nursery rolls were beginning to rise and that no cuts should be made. The budget used for the early years funding formula should be the same in 2010/11 as 2009/10 to aid the move to parity of funding with Worcestershire, Gloucestershire and Shropshire.
 11. SEN Banded Funding – early indications are that the budget for Banded Funding 3 and 4 (including statements and allocations to academies) will be overspent by up to £260,000 in 2009/10. Further analysis is being undertaken to determine the causes however it is prudent to reserve £260,000 for a potential budget increase in 2010/11.
 12. Capital Transfers from Revenue – an initial analysis from 2007/08 and 2008/09 showed that from the non VA school Capital plans submitted, plans were generally affordable from existing Capital sources. The analysis also showed that 56% of primary schools in receipt of Small Schools' Protection transferred at least some Revenue funding to Capital over the two year period. The working group considered that schools should not be able to transfer Revenue funding to Capital unless a Capital scheme had been approved by the schools Capital Asset Management team.
 13. Small Schools' Protection - it was considered that although further information was required on why schools transferred Revenue to Capital, in general it was considered that it was not an acceptable use of Small Schools' Protection to fund Capital projects, particularly when the

Revenue transfer was only made towards at year end. The suspicion was that such transfers were only made to avoid the claw-back of balances. The working party asked for more work to be done on how Small Schools' Protection might be remodelled to support the principle of "small schools by design" for possible implementation in 2011/12.

14. Rates Rebates – two models were considered in detail –
 - a. Model 1 which allocated £965k at £45.17 per pupil to all pupils and £90k allocated pro-rata to the social deprivation funding received in 09/10.
 - b. Model 2 which allocated £965k in proportion to the school budget allocations phase by phase with the same £90k social deprivation allocation as above. The phase allocation gave £38.76 per pupil to primary schools, £47.32 to high schools, £208.79 to special schools and £183.47 to PRUs.
15. The working party felt that the allocations to special schools and PRUs proposed in model 2 were fair but requested a revised model 3 which allocates the remaining money at an equal per pupil amount for primary and high school pupils at approx £43 per pupil. This third model will be discussed at the next meeting for implementation from April 2010.
16. The proposal to allocate the funding in 2010/11 and give schools the choice of either full payment in 2010/11 or equal payment over the three years 2010/11-2012/13 was accepted. The amounts to be paid will be based on January 2009 pupil numbers and will not be altered for changing rolls.
17. Early Years Formula 2010/11 – it was proposed that as the new early years funding formula was based on full costs and primary schools already receive an allocation for premises, rates and management costs there should be a percentage abatement to the existing fixed costs. Funding for fixed costs is reduced in the same way for schools with sixth forms. The Learning & Skills Council sixth form grant includes the full cost for sixth form pupils including premises, rates and management costs, which are already funded through the LMS formula. It was considered fair to apply the same principle to both sixth forms and nursery classes. The Minimum Funding Guarantee will protect schools from the majority of any losses.
18. Subsequent to the Budget Working Group - initial discussions with the headteacher of Brookfield school, on behalf of Pupil Referral Units, have indicated that the extension to statutory 25 hours of teaching provision for all pupils in PRUs from September will increase costs by an estimated £100k in 2010/11 (full year cost in 2011/12 £175k). It is proposed that the Budget Working group include this costs when considering the final budget proposals in January 2010.

Key Considerations

- 19 The proposals represent the first stage of the DSG budget review with further amendments possible when the Working Party meets in January.

Community Impact

- 20 None assessed

Financial Implications

- 21 The proposed recommendations, if accepted, will add £140.5k of additional cost to DSG for 2010/11. Initial estimates of DSG for 2010/11 are for a 3.3% cash increase although this cannot be finalised until pupil numbers in January 2010 are known.

Legal Implications

- 22 These proposals comply with the Council's legal duties.

Risk Management

- 23 The Budget Working Group's proposals for the 2010/11 Budget should be fully considered by Schools Forum and either accepted or rejected. If the proposals are rejected there is a risk that the issue of draft school budgets will be delayed or not as accurate as necessary to inform budget planning by schools. Allowance has been made for minor budget adjustments to be consider in detail at the Budget Working Party meeting on 22nd January prior to confirmation at the meeting of Schools Forum on 23rd February 2010.

Consultees

- 24 There is a statutory requirement that Schools Forum is consulted on proposed changes to centrally held DSG budgets. No further consultation other than Schools Forum is required.

Appendices

Schedule of Central DSG budgets considered by Budget Working Party

Background Papers

Agenda and reports of the Schools Forum Budget Working Group 25th September 2009.

Agenda and reports of the Schools Forum Budget Working Group 13th November 2009.

Proposed Central Budgets 2010/11 – reduction from 2009/10 of £123k

	Category	Cost Centre	08-09 Spend	09-10 Budget	Proposed Adjustments	Proposed 2010/11
1	Banded Funding	Academies - Indiv Assgnd Res	0	316,755	-106,000	210,755
		Banding High	241,473	68,935		68,935
		Banding Primary	616,918	148,065	50,000	198,065
2	Casework Team	Special Operational Servs Dsg	105,155	81,935	20,000	101,935
3	Centrally Funded Absences	Civic & Prof Duties - Prim	95	1,976		1,976
		Civic & Prof Duties - Sec	955	659		659
		Trade Union Duties	36,206	32,000	30,000	62,000
4	Dsg Contingency (excl Rates adj)	Dsg Contingency	15,000	50,000	-10,000	40,000
5	Dsg I&I Management	Excluded Pupils	-83,849	-45,098		-45,098
6	Dsg Ppd Management	Dsg Overhead Recharge	344,153	340,839		340,839
		Hereford L.E.A Swimming Pool	72,271	89,456	-89,456	0
		Schools Forum	1,709	5,210		5,210
		Schools Library Service	3,370	3,440		3,440
7	Dsg Sp&A Management	Accommodation & Planning Dsg	12,605	16,180		16,180
		Admissions Administration	171,113	146,696	15,000	161,696
8	Early Years	Childcare Training Staff (Sp)	57,167	77,010		77,010
		Discretionary Support For Eys	0	58,360		58,360
		Early Years	0	97,450		97,450
		Early Years Teachers	104,778	159,980		159,980
		Ey Train & Development	0	73,650		73,650
		Eys Early Birds	2,685	2,600		2,600
9	Hereford Primary Heads Forum	Hereford Primary Heads Forum	2,271	12,510		12,510
10	Inter Authority Recoupment	Inter Auth.Recoup.-Secondary	40,329	10,014		10,014
		Inter Auth.Recoupment -Special	-20,951	-20,888		-20,888
		Inter Auth.Recoupment-Primary	25,761	5,697		5,697
11	Joint Agency Management	Fees To Independent Schools	322,275	341,060		341,060
		Sen Joint Funding	619,146	877,712		877,712
12	Nursery Education Funding	Early Years - 3 Yr Olds	2,122,867	2,115,551	-21,000	2,094,551
		Early Years - 4 Year Olds	800,012	768,032	-8,000	760,032
13	Pupil Referral Units	Pru Central	895,497	924,268		924,268
14	School Specific Contingency	School Specific Contingency	0	75,000	-35,000	40,000
15	Schools Related Expenditure	Schools Related Expenditure	0	50,000	-25,000	25,000
16	Sen Access & Improvement	Behaviour Support Team	207,127	203,360		203,360
		Braillers & Communicators	67,916	78,980		78,980
		Child Development Cnt Teachers	42,464	47,960		47,960
		Eal Grants	9,808	15,640		15,640
		Eal Support Team	120,011	127,300		127,300
		Hospital & Home Teaching Team	110,744	127,230		127,230
		Learning Support Team	274,639	205,020		205,020
		Sen Acces & Impr Coordinators	70,871	159,970		159,970
		Sen Specialist Advisors	17,526	52,920		52,920
		Sen Support Services Mgmt	66,335	125,030		125,030
		Sen Visual Imp Team	52,143	112,240		112,240
		Sensory Hearing Imp Team	333,786	196,230		196,230
		Social Communication Asd	2,196	52,330		52,330
17	Travellers Children	Travellers' Children	154,380	139,244	-14,000	125,244
	Governor Services				70,000	70,000
Totals			8,038,957	8,528,508	-123,456	8,405,052



MEETING:	SCHOOLS FORUM
DATE:	7TH DECEMBER 2009
TITLE OF REPORT:	FUNDING FOR INCLUSION GROUP – REVISED MODEL FOR DELEGATED BANDS 1 AND 2 FUNDING 2010/11
FINANCE MANAGER	MALCOLM GREEN

CLASSIFICATION: Open

Wards Affected

County-wide

Purpose

To consider changes to the allocation method of delegated Bands 1 and 2 funding for 2010/11. Delegated Banded Funding is used by schools to provide for the special education needs (SEN) of individual pupils.

Key Decision

This is not a Key Decision.

Recommendation(s)

THAT Schools Forum:

1. Approves changes to the Banded Funding delegation model as follows:

2010/11

- a. **The adoption of the “basket of deprivation indicators” to replace the Free School Meals factor**
- b. **Formula Option B – 75% on the new funding model and 25 % on the adjusted/uplifted 2007/08 actual banded funding**
- c. **Protection is 50% of the losses between option B and the uplifted/adjusted 07/08 banded funding actuals for primaries only**

2011/12

- d. **Option C – 100% on the new funding model and 25% protection for primaries**

2012/13

- e. **100% of the new funding model with no protection**

Key Points Summary

The proposals contained in the report replace the use of the single free school meals

Further information on the subject of this report is available from
Malcolm Green on (01432) 260818

indicator with a “basket” approach in 2010/11.

The new model is introduced on a phased basis from the original 2009/10 model of 50% formula/50% banded funding actuals to 75% formula/25% adjusted banded funding actuals in 2010/11 and 100% formula in 2011/12.

Protection is also phased down from 50% of losses in 2010/11, 25% of losses in 2011/12 and no protection in 2012/11.

Alternative Options

1. Continue with the current arrangement which uses pupil numbers and Free School Meals.

Reasons for Recommendations

2. The Funding for Inclusion Group was originally concerned that the use of free school meals as an indicator for distributing SEN funding was not the best option and asked for a review during 2009/10. Children Services Scrutiny Committee have also asked for a review of the use of the single free school meals indicators and recommended the use of a “basket of indicators” approach. The Recommendations of the Funding for Inclusion Group who will be discussing this issue at their meeting on 20th November 2009 will be reported to Schools Forum

Introduction and Background

3. In 2009/10, the allocation of funding for SEN Bands 1 and 2 was delegated on the basis of an amount per pupil plus an amount per pupil claiming Free School Meals (FSM). It was recognised by the Funding for Inclusion Group at the time that other factors may be preferable but this would require more work. The protection factors proposed for 2009/10 would minimise any potential distortions arising from the sole use of the free school meals indicator. Children’s Services Scrutiny Committee has also requested that rather than relying solely on FSM a ‘basket’ of indicators be used (similar to the allocation of social deprivation funding).

2009/10 Allocation Method

4. The impact of the change in allocation this year was mitigated by using an average of the calculated amounts and 2007/8 Bands 1 and 2 allocations uplifted to 2009/10 values. Some schools that saw their allocations reduce significantly received additional protection.

Revised Model Using a Basket of Indicators

5. Using regression analysis we have compared the existing model which uses pupil numbers and free school meals with a ‘basket’ of indicators containing:
 - i. Pupil numbers
 - ii. Low Prior Attainment Score (LPA x NOR)
 - iii. Index of Deprivation Affecting Children Index Score (IDACI x NOR)
 - iv. Free School Meals (FSM) as percentage of NOR
6. Several models were tested but the chosen “basket” is the best fit model having an R Square result of 95.6%. The original funding model for 2009/10 was 81.75%. The new model is fairer and more accurate because the basket approach reduces the distortion caused by FSM and focuses more on pupil numbers. The model has been recalculated omitting those schools that claimed no band 1 and 2 funding in 2007/8.

- 7 The table below demonstrates the effect of the revised funding model for schools with high and low FSM. It can be seen that for the school with low FSM, the use of the “basket” model has a small impact on the amount of funding received but because of the lower reliance on FSM the school with higher FSM receives less funding. This is due to the fact that IDACI and Low Prior Attainment (LPA) measure deprivation in a different way than FSM.

School with high FSM				School with low FSM			
Existing Model	Factors	Funding Amount	Funding	Existing Model	Factors	Funding Amount	Funding
NOR	386	82	31,652	NOR	433	82	35,506
FSM	85	318	27,030	FSM	9	318	2,862
			58,682				38,368
Basket				Basket			
NOR	386	60.1	23,199	NOR	433	60.1	26,023
LPA Score	57.446	120.83	6,941	LPA Score	35.50	120.83	4,289
IDACI Score	95.47	128.44	12,262	IDACI Score	39.01	128.44	5,011
FSM % of NOR	20.63	219.83	4,535	FSM % of NOR	2.08	219.83	457
			46,937				35,780

- 8 A full list of the changes to funding can be found in the Appendix. For 2010/11 allocations made solely on the 2009/10 model (excluding protection) will be £2.4m. By comparison, the “basket approach” will cost £2.5m (pupil numbers are per the autumn 2009 census). The additional cost will be met from Dedicated Schools Grant.

Protection Arrangements

- 9 In 2009/10 to mitigate the effects of the change in formula, temporary protection arrangements were put in place for primary schools. Schools received 50% of the new allocation and 50% of the 2007/8 allocation, uplifted to current year values. No adjustment was made for changes in pupil numbers. In addition, the six schools with losses in excess of £5k received extra funding, with the balance of £50k being distributed across all schools.

Proposed Protection 2010/11

Option A

- 10 Continue with the existing arrangement of 50% of delegated model and 50% of the 2007/8 figures uplifted to current year values (1% increase based on the expected minimum funding guarantee). As there will now be a three year gap between the January 07 and January 10 pupil numbers i.e. 3 year groups will have left primary schools representing at least 50% of the pupils likely to have received banded funding in 07/08. It is proposed therefore that the 2007/8 figures will be adjusted pro-rata to reflect the January 2010 census and additional protection will be paid to fund 50% of the losses.

Option B

- 11 Use 25% of the uplifted/adjusted 2007/8 actual banded funding figures and 75% of the delegated model, with additional protection of 50% of loss being paid to those schools who receive less funding than the adjusted 2007/8 allocation.
- 12 This reflects a further year of pupils moving out of school and thereby reducing the original 50:50 formula /model to better reflect the change in pupil cohorts since 2007/08 by reducing to 25%. This then allows the 07/08 actual banded funding to be phased out in 2011/12.

Protection 2011/12 and Beyond

- 13 In 2011/12 it is proposed that 100% of the delegated model is allocated with losses compared with adjusted 2007/8 amounts being funded at 25% of loss. From 2012/13 schools will receive 100% funding as per the model with no additional protection.

	2009/10 Allocation (50% model 50% 07/08 Uplifted)	Option A 10/11	Option B 10/11	2011/12
Allocation	2,302,262	2,380,513	2,435,050	2,489,587
Extra protection 6 schools	18,212			
Balance of £50k	31,788			
Protection at 50%		33,273	49,913	
Protection at 25%				33,273
Cost of Model	2,352,262	2,413,786	2,484,963	2,522,860

Increase 2.6% 5.6% 1.5%

- 14 Please note that Options A and B for 10/11 include an inflationary increase of 1% in line with the expected Minimum Funding Guarantee and also take account of a 12% increase in free school meals in 10//11 which will have increased the amount delegated by £50k equivalent to a further 2%.

Key Considerations

- 15 The proposals represent the formula improvements requested by the Funding for Inclusion Group and the Children's Services Scrutiny Committee. The proposals also include the phasing out of protection by 2012/13.

Community Impact

- 16 None assessed

Financial Implications

- 17 In 10/11 the delegated funding is forecast to cost approximately £2.5m (see table above).

Legal Implications

- 18 These proposals comply with the Council's legal duties.

Risk Management

- 19 The Funding For Inclusion Group is currently the reference group which reviews the arrangements for providing Special Education Needs in mainstream schools and will continue to monitor the impact of SEN delegation annually.

Consultees

- 20 There is a statutory requirement that Schools Forum is consulted on proposed changes to the formula funding model. No further consultation other than Schools Forum is required.

Appendices

The Appendix lists the funding allocated to primary and high schools and the protection allocated by the proposed new SEN delegation model.

Background Papers

Report to Funding for Inclusion Group showing impact of recommended delegation model of all schools.



Cost Centre	School	January 10 Est NOR	2007/8 Uplifted/A djusted for NOR	Option B Excluding Protection	Protection	Total	Final Loss/Gain	09/10 Funding Including Protection
E0131	HEREFORD, LORD SCUDAMORE PRIMARY	572	87,248	69,827	8,711	78,538	-8,710	72,845
E0158	MADLEY PRIMARY	185	39,712	25,442	7,135	32,577	-7,135	34,688
E0113	CLEHONGER C.E. PRIMARY	117	28,194	18,577	4,808	23,385	-4,809	31,334
E0147	LEA C.E. PRIMARY	71	23,464	14,045	4,710	18,755	-4,709	27,275
E0148	LEDBURY PRIMARY	448	64,953	55,549	4,702	60,251	-4,702	60,610
E0179	WESTON-UNDER-PENYARD C.E. PRIMARY	88	14,286	9,173	2,557	11,730	-2,556	11,812
E0124	GOODRICH C.E. PRIMARY	120	14,018	9,804	2,107	11,911	-2,107	12,484
E0153	LITTLE DEWCHURCH C.E. PRIMARY	51	8,291	4,714	1,789	6,503	-1,788	6,898
E0111	BURLEY GATE C.E. PRIMARY	91	16,845	13,406	1,719	15,125	-1,720	17,748
E0105	BREDENBURY PRIMARY	82	18,468	15,066	1,701	16,767	-1,701	12,276
E0128	HEREFORD, HOLMER C.E. PRIMARY	300	34,439	31,879	1,280	33,159	-1,280	29,901
E0155	LONGTOWN PRIMARY	45	8,094	5,636	1,229	6,865	-1,229	7,786
E0108	BROCKHAMPTON (BROMYARD) PRIMARY	107	13,231	10,867	1,182	12,049	-1,182	17,785
E0168	ROSS-ON-WYE, ASHFIELD PARK PRIMARY	286	39,639	37,427	1,106	38,533	-1,106	42,179
E0114	CLIFFORD PRIMARY	62	8,212	6,263	975	7,238	-974	8,144
E0161	MORDIFORD C.E. PRIMARY	132	11,877	10,414	731	11,145	-732	10,872
E0166	PENCOMBE C.E. PRIMARY	55	5,141	3,764	688	4,452	-689	4,354
E0123	GARWAY PRIMARY	53	6,688	5,371	659	6,030	-658	8,314
E0144	KINGSLAND C.E. PRIMARY	137	12,088	11,163	463	11,626	-462	12,705
E0175	SUTTON PRIMARY	64	7,019	6,196	412	6,608	-411	6,375
E0160	MICHAELCHURCH ESCLEY PRIMARY	54	7,692	7,076	308	7,384	-308	7,332
E0146	KINGTON PRIMARY	189	27,487	26,902	293	27,195	-292	28,419
E0152	LEOMINSTER, IVINGTON C.E. PRIMARY	87	17,869	17,365	252	17,617	-252	17,163
E0145	KINGSTONE AND THRUXTON PRIMARY	174	22,886	22,388	249	22,637	-249	23,023
E0120	EASTNOR PAROCHIAL PRIMARY	74	8,140	7,846	147	7,993	-147	8,842
E0143	KING'S CAPLE PRIMARY	36	3,150	3,423	0	3,423	273	4,015
E0117	ST.MARY'S C.E. CREDENHILL PRIMARY	176	17,950	18,393	0	18,393	443	19,231
E0100	ALMELEY PRIMARY	70	8,398	8,873	0	8,873	475	7,262
E0116	CRADLEY C.E. PRIMARY	107	7,708	8,382	0	8,382	674	10,092
E0174	STRETTON SUGWAS C.E. PRIMARY	106	5,704	6,433	0	6,433	729	7,069
E0167	PETERCHURCH PRIMARY	62	5,328	6,107	0	6,107	779	6,264
E0104	BRAMPTON ABBOTTS C.E. PRIMARY	108	17,620	18,588	0	18,588	968	19,096
E0181	WHITCHURCH C.E. PRIMARY	104	11,845	12,823	0	12,823	978	11,390
E0154	LLANGROVE C.E. PRIMARY	51	2,433	3,421	0	3,421	988	4,687
E0103	BOSBURY C.E. PRIMARY	130	13,127	14,164	0	14,164	1,037	12,955
E0183	WITHINGTON PRIMARY	67	7,522	8,633	0	8,633	1,111	8,157
E0118	DILWYN C.E. PRIMARY	31	870	2,164	0	2,164	1,294	2,015
E0162	MUCH BIRCH C.E. PRIMARY	189	12,878	14,328	0	14,328	1,450	14,009
E0165	PEMBRIDGE C.E. PRIMARY	103	6,126	7,792	0	7,792	1,666	7,766
E0169	ROSS-ON-WYE, ST.JOSEPH'S R.C. PRIMARY	105	9,572	11,274	0	11,274	1,702	10,233
E0102	BODENHAM, ST. MICHAEL'S C.E. PRIMARY	97	7,826	9,707	0	9,707	1,881	9,687
E0139	HEREFORD, ST. THOMAS CANTILUPE C.E. PRIMARY	195	20,994	23,284	0	23,284	2,290	25,427
E0159	MARDEN PRIMARY	84	4,306	6,675	0	6,675	2,369	6,421
E0156	LUGWARDINE PRIMARY	178	10,786	13,352	0	13,352	2,566	12,027
E0171	SHOBDON PRIMARY	49	6,524	9,119	0	9,119	2,595	7,395
E0112	CANON PYON C.E. PRIMARY	74	3,855	6,825	0	6,825	2,970	5,802
E0164	ORLETON C.E. PRIMARY	200	12,001	15,027	0	15,027	3,026	13,937
E0119	EARDISLEY C.E. PRIMARY	62	2,419	5,599	0	5,599	3,180	5,342
E0177	WELLINGTON PRIMARY	94	7,784	11,053	0	11,053	3,269	11,824
E0180	WHITBOURNE C.E. PRIMARY	49	522	3,792	0	3,792	3,270	3,035
E0138	HEREFORD, TRINITY PRIMARY	562	57,628	60,997	0	60,997	3,369	56,908
E0122	FOWNHOPE, ST. MARY'S C.E. PRIMARY	92	2,544	6,054	0	6,054	3,510	5,215
E0126	HEREFORD, BROADLANDS PRIMARY	202	24,643	28,206	0	28,206	3,563	37,316
E0110	BURGHILL PRIMARY	81	3,501	7,066	0	7,066	3,565	5,652
E0115	COLWALL C.E. PRIMARY	168	9,109	12,712	0	12,712	3,603	14,107
E0170	ST. WEONARD'S PRIMARY	45	0	3,896	0	3,896	3,896	3,118
E0121	EWYAS HAROLD	120	6,799	10,738	0	10,738	3,939	10,563
E0135	HEREFORD, ST. JAMES' C.E. PRIMARY	208	15,320	19,333	0	19,333	4,013	17,973
E0182	WIGMORE PRIMARY	126	10,772	14,809	0	14,809	4,037	13,915
E0142	KIMBOLTON, ST. JAMES' C.E. PRIMARY	89	1,697	5,780	0	5,780	4,083	4,315
E0173	STOKE PRIOR (LEOMINSTER) PRIMARY	78	1,726	5,880	0	5,880	4,154	4,393
E0140	HOLME LACY PRIMARY	63	4,713	9,052	0	9,052	4,339	5,404
E0178	WEOBLEY PRIMARY	138	15,992	20,518	0	20,518	4,526	20,441
E0106	BRIDSTOW C.E. PRIMARY	90	4,396	9,123	0	9,123	4,727	6,332
E0151	LEOMINSTER JUNIOR	308	43,763	48,756	0	48,756	4,993	51,734
E0127	HEREFORD, HAMPTON DENE PRIMARY	237	15,092	20,115	0	20,115	5,023	22,697

Further information on the subject of this report is available from
Malcolm Green on (01432) 260818

Cost Centre	School	January	2007/8				Final	09/10
		10 Est NOR	Uplifted/A djusted for NOR	Option B	Protection		Loss/Gain	Funding Including Protection
E0157	LUSTON PRIMARY	98	5,354	10,385	0	10,385	5,031	8,893
E0101	ASHPERTON PRIMARY	154	8,333	13,561	0	13,561	5,228	11,720
E0149	LEINTWARDINE ENDOWED PRIMARY	98	1,441	6,782	0	6,782	5,341	5,953
E0172	STAUNTON-ON-WYE ENDOWED PRIMARY	70	0	6,601	0	6,601	6,601	3,286
E0176	WALFORD PRIMARY	177	4,760	11,486	0	11,486	6,726	11,113
E0133	HEREFORD, OUR LADY'S R.C. PRIMARY	197	8,613	17,129	0	17,129	8,516	16,491
E0134	HEREFORD, ST. FRANCIS XAVIER'S R.C. PRIMARY	208	6,004	15,207	0	15,207	9,203	13,555
E0163	MUCH MARCLE C.E. PRIMARY	101	0	10,100	0	10,100	10,100	5,816
E0125	GORSLEY GOFFS PRIMARY	166	406	11,064	0	11,064	10,658	8,163
E0109	BROMYARD, ST. PETER'S PRIMARY	196	16,381	27,287	0	27,287	10,906	21,127
E0150	LEOMINSTER INFANTS'	244	24,758	40,064	0	40,064	15,306	28,820
E0137	HEREFORD, ST. PAUL'S C.E. PRIMARY	427	14,465	30,464	0	30,464	15,999	26,390
E0185	RIVERSIDE PRIMARY	336	42,450	60,910	0	60,910	18,460	52,405
E0132	HEREFORD, MARLBROOK PRIMARY	396	40,857	63,523	0	63,523	22,666	49,310
E0136	HEREFORD, ST. MARTIN'S PRIMARY	302	26,106	49,933	0	49,933	23,827	40,966
E0302	HEREFORD, BISHOP OF HEREFORD'S BLUECOAT	1181	111,571	108,201	0	108,201	-3,370	112,686
E0310	PETERCHURCH, FAIRFIELD HIGH	391	42,354	39,011	0	39,011	-3,343	39,107
E0304	HEREFORD, ST MARY'S R.C. HIGH	693	61,418	60,739	0	60,739	-679	62,230
E0313	WIGMORE HIGH	458	49,191	48,969	0	48,969	-222	47,994
E0311	ROSS-ON-WYE, THE JOHN KYRLE HIGH	1059	115,142	116,450	0	116,450	1,308	104,124
E0305	HEREFORD, WHITECROSS HIGH	893	90,949	93,069	0	93,069	2,120	91,930
E0312	WEOBLEY HIGH	456	55,368	57,797	0	57,797	2,429	51,954
E0307	KINGTON, LADY HAWKINS	413	47,354	53,684	0	53,684	6,330	47,034
E0300	(BROMYARD) QUEEN ELIZABETH HIGH	299	33,862	41,724	0	41,724	7,862	37,856
E0309	LEOMINSTER, THE MINSTER COLLEGE	582	73,546	86,597	0	86,597	13,051	78,562
E0308	LEDBURY, THE JOHN MASEFIELD HIGH	743	71,090	84,995	0	84,995	13,905	78,057
E0306	KINGSTONE HIGH	618	62,328	79,077	0	79,077	16,749	68,819
E0301	HEREFORD, AYLESTONE HIGH	763	63,350	98,552	0	98,552	35,202	94,863
E0400	HEREFORD ACADEMY	650	75,851	113,264	0	113,264	37,413	86,654
			2,124,226	2,435,050	49,913	2,484,963	360,737	2,352,263

Herefordshire Schools Forum – Work Programme 2009/10

7 December 2009 2pm Brockington	
Officer Reports	<ul style="list-style-type: none"> • Delegation of Banded Funding 2009/10 - Review of the Representation of the Funding for Inclusion Group (Minute No.93 2008/09) • School Task Group Implications (Minute No. 29 - 2009/10) • Business Cases for DSG (Minute No. 29 - 2009/10) • Budget Working Group (Minute No. 29 - 2009/10) • Schools Finance Scheme • Service Level Agreements - Charging Proposals (Minute No.68 - 2008/09) • Constitution – Business School Manager Membership (Minute No. 29 - 2009/10)
12 January 2010 2pm Brockington	
Officer Reports	<ul style="list-style-type: none"> • Early Years Funding Formula (Minute No. 29 - 2009/10) • Extended Schools Spending (Minute No. 29 - 2009/10) • School Task Group (Minute No. 29 - 2009/10)
1 February 2010 9.30am Brockington	
Officer Reports	

23 February 2010	2pm Brockington
September 2010 (meeting date not yet fixed)	
Officer Reports	<ul style="list-style-type: none"> • Performance Outcomes Against Grant Spends