

Agenda

Herefordshire schools forum

Date: **Friday 19 October 2018**

Time: **9.30 am**

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

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

For any further information please contact:

Sarah Buffrey, Governance Services

Tel: 01432 260176

Email: sarah.buffrey@herefordshire.gov.uk

If you would like help to understand this document, or would like it in another format or language, please call Sarah Buffrey, Governance Services on 01432 260176 or e-mail sarah.buffrey@herefordshire.gov.uk in advance of the meeting.

Agenda for the Meeting of the Herefordshire schools forum

Membership

Chairman

Mr A Evans

Mainstream Academies

Vice-Chairman

Mrs J Cohn

Academy Special School Representative

Agenda

		Pages
1.	<p>ELECTION OF CHAIRMAN</p> <p>To elect a chairman for the ensuing year.</p>	
2.	<p>ELECTION OF VICE-CHAIRMAN</p> <p>To elect a vice-chairman for the ensuing year.</p>	
3.	<p>APOLOGIES FOR ABSENCE</p> <p>To receive apologies for absence.</p>	
4.	<p>NAMED SUBSTITUTES (IF ANY)</p> <p>To receive any details of Members nominated to attend the meeting in place of a Member of the Forum.</p>	
5.	<p>DECLARATIONS OF INTEREST</p> <p>To receive any declarations of interest by Members in respect of items on the Agenda.</p>	
6.	<p>MINUTES</p> <p>To approve and sign the minutes of the meeting held on 6 July 2018.</p>	5 - 36
7.	<p>LOCAL AND NATIONAL SCHOOL FUNDING UPDATE</p> <p>To update the forum on local and national school funding issues, including the recommendations of the budget working group (BWG) on the following matters:</p> <ol style="list-style-type: none"> 1. Herefordshire schools budget 2019/20 2. f40 briefing on school funding 3. High needs budget 2019/20 4. DSG outturn 2017/18 5. Apprentice levy - update on the optimal use of the levy to support community and voluntary controlled schools in Herefordshire 	37 - 56
8.	<p>LOCAL MANAGEMENT OF SCHOOLS DIRECTED CHANGES</p> <p>To approve a change to the local scheme for managing schools to ensure compliance with a national direction.</p> <p><i>Deferred item from inquorate meeting of 6 July 2018</i></p>	57 - 64
9.	<p>REVIEW OF SCHOOLS FORUM MEMBERSHIP</p> <p>To review membership of the budget working group to ensure proportionality or else to agree to the group not being proportionate.</p> <p><i>Deferred item from inquorate meeting of 6 July 2018.</i></p>	65 - 68
10.	<p>WORK PROGRAMME 2018-19 AND DATES OF FUTURE MEETINGS</p> <p>To review the work programme for 2018-19 and identify any additional items the forum wishes to consider.</p> <p>To consider dates for future forum meetings.</p>	69 - 74



Minutes of the meeting of Herefordshire schools forum held at The Council Chamber - The Shire Hall, St. Peter's Square, Hereford, HR1 2HX on Friday 6 July 2018 at 9.30 am

Present:

Mrs J Cohn (Academy Special School Representative) (Vice Chairman – in the Chair)

Mrs S Bailey	Local Authority Special School Headteachers
Mr P Burbidge	Roman Catholic Church
Mrs J Cohn	Academy Special School Representative
Mr P Deneen	Trade Union Representative
Mr S Kendrick	Local Authority Maintained Primary School (Nursery)
Mr C Lewandowski	Trade Union Representative
Mrs S Lines	Church of England
Mrs R Lloyd	Early Years Representative
Mrs J Rees	Local Authority Maintained Primary School
Mrs K Weston	Local Authority Maintained Primary School

In attendance: Councillors FM Norman, NE Shaw (Cabinet Member) and EJ Swinglehurst (Cabinet Member)

Officers: L Fraser (Interim Assistant Director Education Development and Skills), M Green (Schools Finance Manager)

1. APOLOGIES FOR ABSENCE

Apologies were received from Mr Edwards, Mr A Evans, Mr G Evans, Mr Farmer, Mrs Johnson, Mr Knapp, Mr Henton and Mr Lewis.

2. NAMED SUBSTITUTES

None.

(It was reported that Mr Burbidge had been authorised to represent the views of the maintained primary and secondary school governor representatives who had been unable to attend the meeting.)

3. DECLARATIONS OF INTEREST

None.

(It was reported that the meeting was inquorate. As provided for in section 9 of the Forum's Constitution this meant that the meeting could proceed but could not legally take decisions. The meeting could respond to local authority consultation and give views

to the local authority. The local authority may choose to take account of views from an inquorate meeting, but was not legally obliged to do so.

It was noted that there were some decisions invited on two of the items. Consideration would be given to whether the urgent decision making mechanism in the constitution would need to be employed subsequent to the meeting.)

4. MINUTES

The meeting indicated approval of the minutes of the meeting held on 23 March 2018.

5. UPDATE ON NATIONAL SCHOOL FUNDING (Pages 5 - 6)

The Schools Finance Manager (SFM) gave a presentation.

A copy of the slides is attached to these minutes at appendix 1.

In response to questions the SFM clarified the role of the F40 Group comprising the 40 lowest funded local authorities. He considered that Herefordshire being part of this grouping offered access to the Secretary of State in a way that Herefordshire would not achieve otherwise. The Department for Education was under no illusion about the funding pressures faced by schools, in particular in relation to high needs.

Thanks were extended to the SFM for his work on the F40 group and his contribution to ensuring that the voice of Herefordshire was heard at national level.

The interim Assistant Director provided an update on Robert Owen school indicating that it would close at the end of August 2018. Places had been found for pupils at other schools. It was not yet clear whether the government would make additional funding available for those schools. The future of the school buildings was as yet unknown.

The agenda item was noted.

6. LOCAL MANAGEMENT OF SCHOOLS DIRECTED CHANGES

The Forum was invited to approve a change to the council's local scheme for managing schools, as directed by the Department for Education. The directed change was to ensure that loans agreed by the council with schools in future are for capital purposes only.

The Schools Finance Manager (SFM) presented the report.

Members supported the amendments to the scheme for financing schools.

The SFM reported that as the Secretary of State had directed that the changes be made with effect from 22 March 2018, the matter could await ratification by the Forum in October.

7. REVIEW OF SCHOOLS FORUM MEMBERSHIP

The Forum was invited to review the membership of the Herefordshire Schools Forum and the Budget Working Group and to consider arrangements for elections of members for the 2018-2021 term.

Members indicated support for recommendations as set out in the report:

That:

- (a) the outcome of the annual review of proportionality is noted and no changes are made to allocations of seats on Herefordshire Schools Forum;
- (b) the allocation of seats on the budget working group be adjusted in line with the outcome of the proportionality review by reducing the number of seats allocated to local authority maintained secondary schools to one and increasing the number of seats allocated to academies to five; and
- (c) the timetable for elections to the forum for the 2018-2021 term, as set out in paragraph 17, is supported.

It was noted that consideration would be given to whether the mechanism for taking an urgent decision on any of these matters would need to be employed.

8. HEREFORDSHIRE COUNCIL BUDGET PRIORITIES CONSULTATION (Pages 7 - 32)

The Schools Finance Manager (SFM) gave a presentation briefing members of the Forum on the council's budget priorities consultation for 2019/20.

A copy of the slides is attached to these minutes at appendix 2. The budget consultation questionnaire had been circulated as a supplement to the agenda papers.

In discussion the following principal points were raised:

- The apprentice levy was discussed. It was noted that if the funding was not spent any unspent balances were returned to government and not schools. It was observed that there were a range of activities that were eligible for funding from the levy. It was proposed that a briefing should be issued to all schools via the September edition of the Spotlight highlighting the opportunities available for using this funding. The subject could also be added to the agenda for the Governor and Head Teacher briefings in the Autumn.
- The pressure business rates placed on businesses and the effect this had on school fund raising opportunities was mentioned. The cabinet member finance and corporate services commented that business rates whilst collected by the council were set nationally. Whilst the regime was changing and councils would retain a higher proportion of this income locally it was unclear what responsibilities might be placed upon councils alongside this change and whether the rate levels would change.
- The cabinet member finance and corporate services undertook to seek clarification on the council's policy on the future operation and funding of children's centres.
- The provision of bus services and community care packages were also touched upon.

Members of the forum noted the presentation.

9. DATE OF NEXT MEETING

It was noted that the next scheduled meeting was 19 October 2018.

In closing the meeting, noting that elections to the Forum were due, the Vice-Chairman thanked members for their contribution to the Forum's work.

Thanks were expressed to officers for their work in supporting the Forum.

The meeting ended at 10.40 am

Chairman

School Funding Update 2019-20

- The 2019-20 schools NFF will be broadly the same as the 2018-19 NFF, with the following key differences (already announced):
 - The funding floor will increase to 1% against 2017-18
 - The gains cap will increase to 6.09% against 2017-18
 - The minimum per pupil funding levels will increase to £3,500 and £4,800 for primary and secondary schools respectively
- The most substantial change in 2019-20 will be the introduction of a formulaic approach to the growth factor.

NFF – Growth calculation

- DfE introducing a growth factor
 - Based on lagged pupil growth
 - Measured at middle super output areas
 - Additional amount for new schools
- Growth in pupils funded between two most recent October pupil census
 - Pupil funding rates at £1,370 primary and £2,050 secondary
 - £65,000 for each new school built
- We may get some extra funding – until now we haven't had a growth fund and a policy to allocate – this will be new for us and may be required for 2019-20.

School Funding Update 2019-20

- PFI factor will be indexed by RPI
- Mobility factor to be improved and maybe introduced for 2020-21
- Primary Low Prior Attainment – small reduction in factor value to reflect the increase in cohort size
- DfE to publish primary and secondary DSG funding values 2019-20 (PUFs & SUFs to multiply by pupil numbers to determine Schools Block)
- DfE to publish illustrative school allocations in July – not sure this is useful as pupil numbers change

High Needs Update 2019-20

- 2019-20 broadly same as 2018-19 with key differences
 - Funding floor increases by 1% compared with 2017-18
 - Gains cap increases to 6.09% equivalent to 3% year on year.
- Special free schools transferred into DSG for 2019-20
- Hospital Education – DfE reviewing allocations with a view to change
- Special school sixth form grant paid into DSG
- **SFVS – to be developed further to include a dashboard for 2019-20 and a voluntary version for academies from September 2018.**

f40 Update 2019-20

- F40 met with Secretary of State last week
 - High needs high on the f40 agenda and stressed without additional funding situation would become critical
 - Expressed importance of teacher recruitment and retention
 - Asked for additional funding to cover pay awards
 - Annual inflation increases for schools and high needs funding
 - Benefits of 3-4 year rolling budget programme for schools to give greater certainty
 - Constructive relationship between DfE officials and f40 to work together to improve National Funding Formula

2019/20 Budget consultation

1

MINUTE ITEM 8

Budget consultation

- Each year Herefordshire Council consults on its budget and this year is no different.
- We want to hear your views on some of the tough decisions we will need to take.
- We have a clear focus on improving outcomes for Herefordshire and an enviable track record of delivering on what we set out to do.
- We are proud of our work with partners and communities in transforming services and improving outcomes. This is underpinned by our strong social and commercial values.

8

Herefordshire and the need for change

- As a county we have fantastic economic, social and landscape assets – we offer a unique quality of life to people who work and live within the county and for those who visit the area and want to do business here.
- The council has reshaped in recent years – we continue to invest in a range of projects that change the way we work and how we deliver services to meet the needs of customers.

Herefordshire and the need for change

- The high costs of providing services for a rural and sparsely populated county have always been a challenge.
- The county has an older age structure than England & Wales as a whole and this proportion is increasing annually.
- To cope with this and other demands such as children's wellbeing, we are focusing on prevention.
- We aim to work with individuals, families and communities to support them to be independent and to keep them safe and healthy.

Herefordshire Council

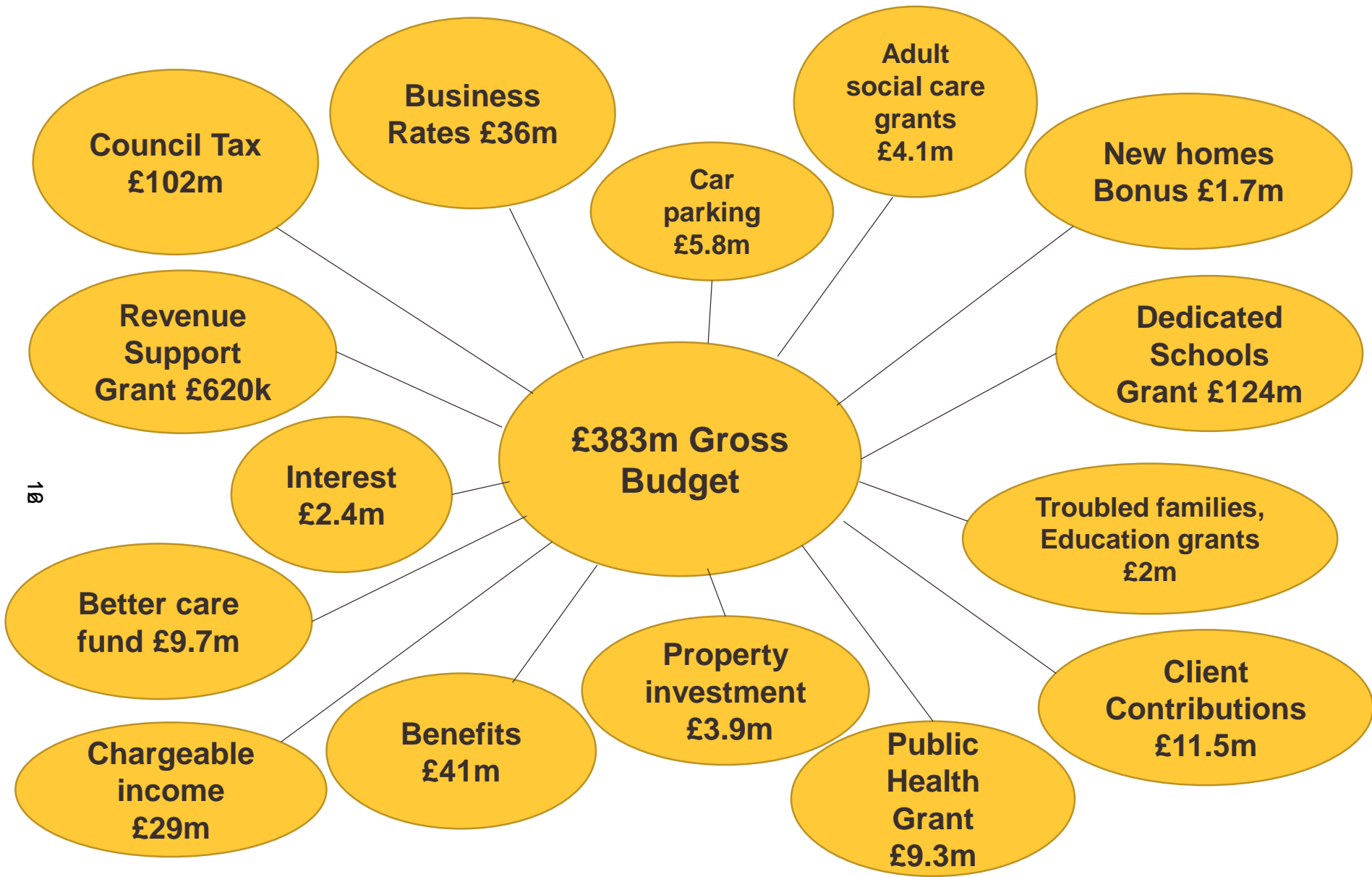
2018/19:

- Gross revenue budget £383m
- Council Tax charges for an average Band D property (£120.32 per month)
- Capital budget £147m 2018-2021

15

2019/20:

- Our Medium Term Financial Strategy assumes a 4.9% increase to next year's Council Tax (£126.23 per month for an average Band D property)
 - 2.9% increase in the core Council Tax
 - 2% adult social care precept



18

Projected 2019/20 Till Receipt



Charges per month (average Band D property)
2019/20 Monthly Council Tax receipt

	#
** Daily life **	
* Bin collections and environment	13.72
* Roads, bridges and care of public spaces	7.21
* Schools and education	98.13
* Buses and community transport	6.39
* Libraries, records and customer services	1.30
** Looking after adults **	
* Older people in residential / nursing care	13.38
* Older people supported at home	9.24
* Disabled adults	27.76
* Lifestyles services (substance abuse, sexual health)	2.64
* Health improvement (Public Health nursing, health checks, smoking cessation)	5.61
* Housing	0.52
** Looking after children **	
* Child protection	3.75
* Children in care	12.87
* Children with special needs	3.28

**** Local government running costs ****

* Election, governance and legal services	3.24
* Directors & staff costs	0.65
* Organisational administration	1.41
* IT, transactions and billing (Hoople)	5.19
* Insurance and property maintenance	5.08
* Capital finance - Debt repayment	7.83
* Capital finance - Interest payments	10.24

**** Economic growth ****

* Economic development and regeneration	1.27
* Broadband - rural rollout	0.13
* Planning	0.35
	241.19

**** VOUCHER ****

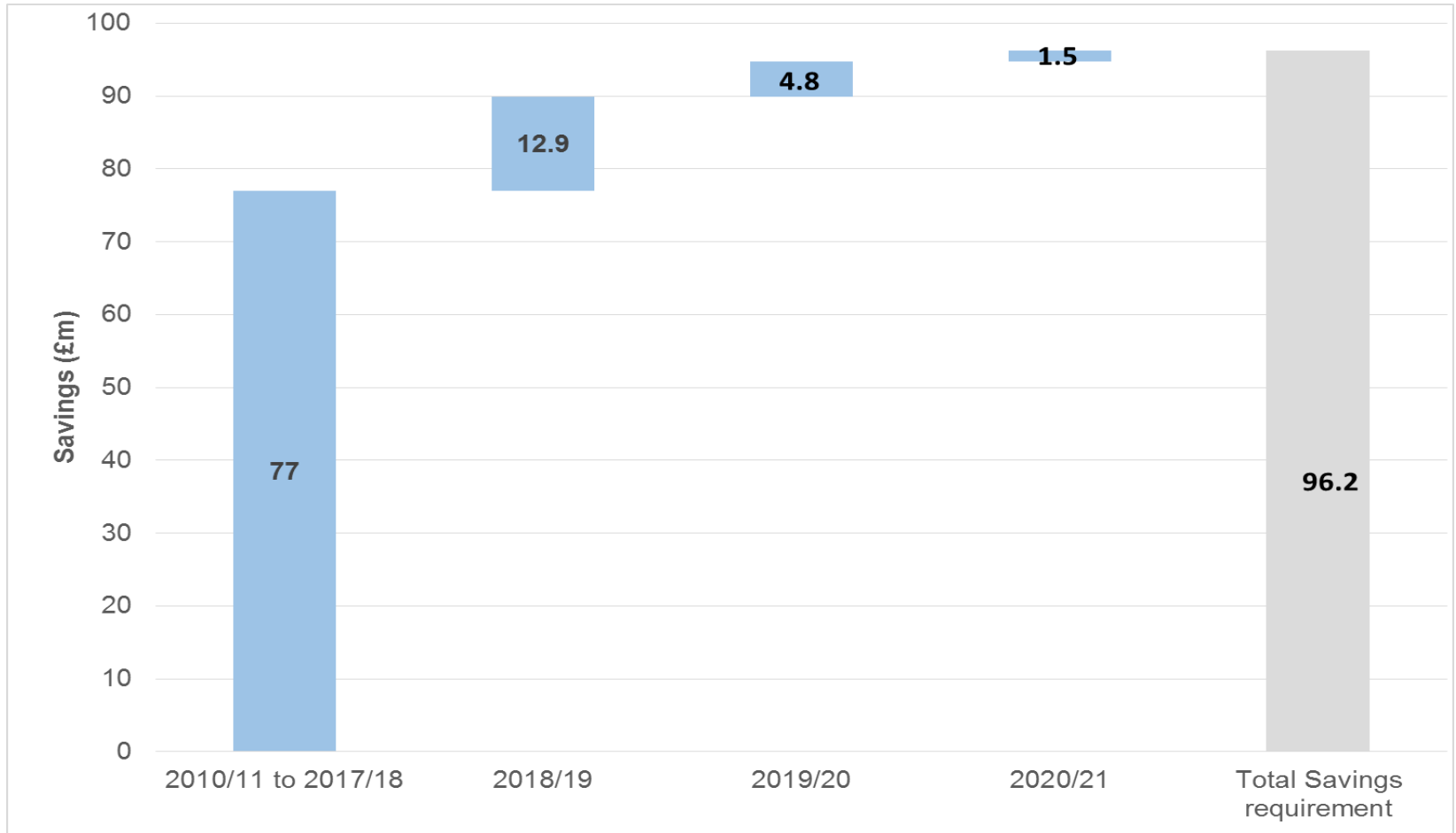
** Other income to supplement council tax **	
* Investment Property income	-2.91
* Car parking	-5.36
* Capital finance - Interest received	-2.01
* Public Health grant	-7.70
* National Education funding (schools)	-96.98

TOTAL TO PAY (per month) £126.23

SIGN UP FOR MORE INFORMATION AT
WWW.HEREFORDSHIRE.GOV.UK/COUNCILTAX
01/04/19 09:00 1234 23 42

Scale of change

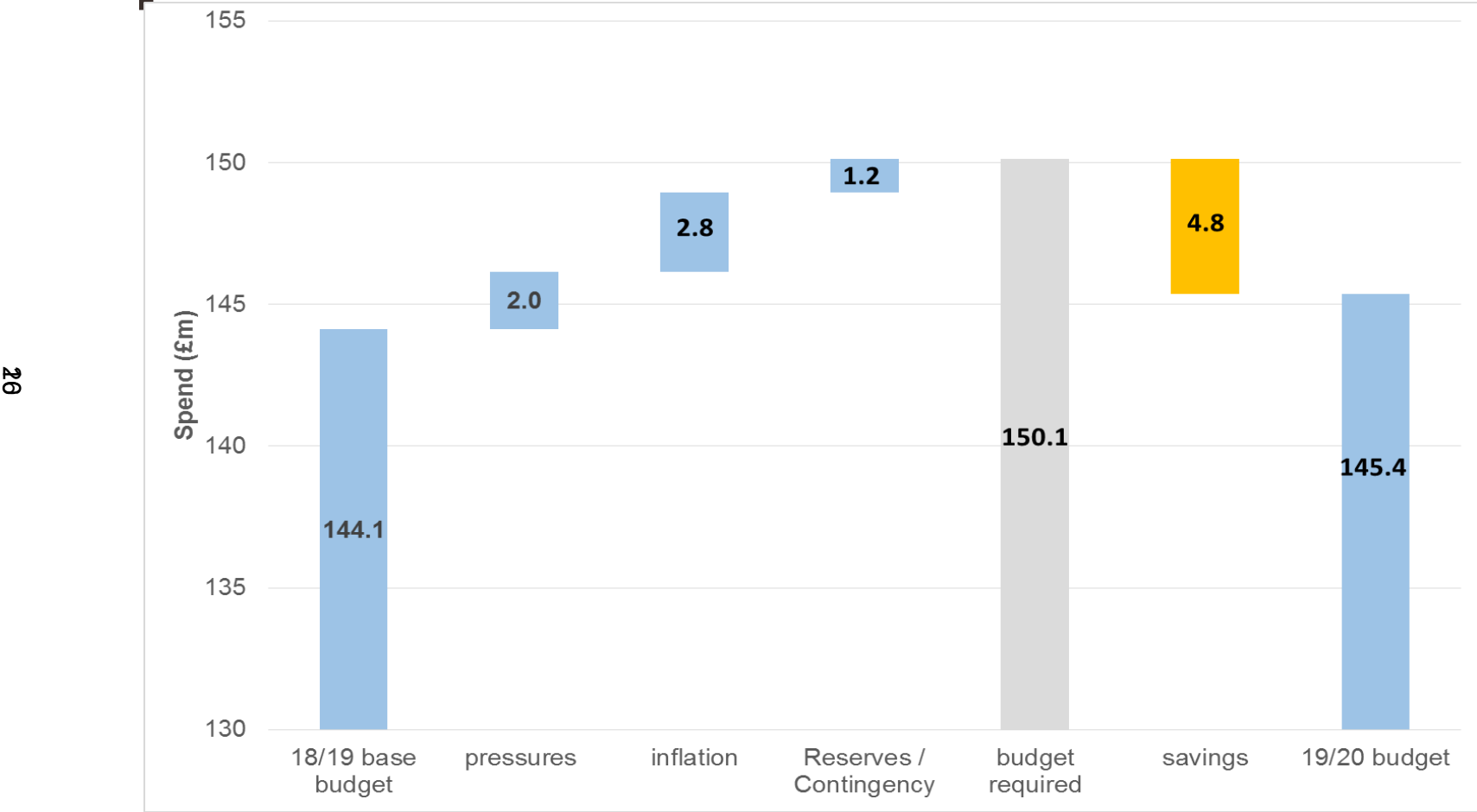
18



Savings required

Directorate Savings	2019/20 £000s	2020/21 £000s	Total £000s
Adults and wellbeing	1,500	0	1,500
Children's wellbeing	1,050	650	1,700
Economy, communities & corporate	2,017	350	2,367
Corporate savings	200	500	700
Total Savings	4,767	1,500	5,267

Calculation of savings requirement for 2019/20



Priorities

Our priorities for the period 2016 – 2020 are set out in the Herefordshire Council Corporate Plan:

- Enable residents to live safe, healthy and independent lives;
- Keep children and young people safe and give them a great start in life;
- Support the growth of our economy; and
- Secure better services, quality of life and value for money.

Feedback from business

- Find it difficult to recruit and retain good quality staff.
- Skills gaps in certain sectors.
- Infrastructure is key to opening up new markets and accessing services.

28

The council's response

- A positive planning framework with 16,500 new houses across the county.
- New employment allocations in Hereford and the market towns.
- New infrastructure, including bypasses for Leominster and Hereford

Moving forward

- We will build 'assets' that support indigenous business growth and attract inward investment.
- We will develop the relationship between the public and private sectors.
- 20 • We have appointed two development partners (Keepmoat Homes and Engie Regeneration).
- We are the accountable body on behalf of central Government for the £23m to the New Model in Technology & Engineering (NMiTE) for delivering the new university.

£1.5m Adults and wellbeing savings required in 2019/20

Savings Proposal	£000
Improved Better Care Fund (IBCF) – Workforce savings	600
Implementation of the Adult Social Care Pathway	800
Change in Policy on disregards	100
Total adults and wellbeing	1,500

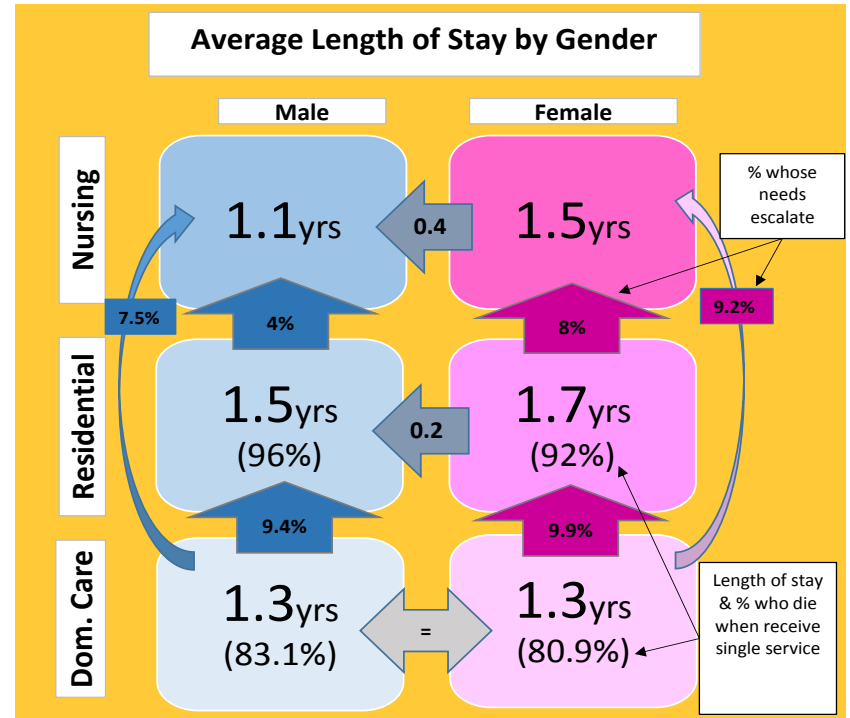
Adults and wellbeing

- Implementation of our pathway model is paying dividends and has been recognised as best practice in the sector.
- We have seen a reduction in the average cost of care packages.
- 28 • A new strategy for people with learning disabilities has been adopted – its focus is to ensure the best outcomes for this group of vulnerable people.
- It is imperative that our Public Health and wider wellbeing message is heard by system partners.

How long do they stay?



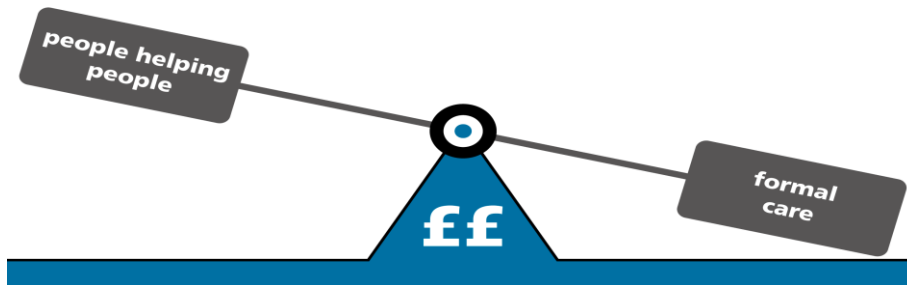
23



How can you help

- Get to know and use our community advice and directory tool – WISH;
- Encourage your local groups and volunteers to register their skills and activities on WISH;
- Direct people to WISH if they are looking for some help or support that they or their families or carers could organise themselves;
- Find out about local projects or activities that are building networks of support and offer your local knowledge and insights to support them e.g. Connecting Communities – Leominster – Golden Valley

28



£1.050m Children's wellbeing savings required in 2019/20

Savings Proposal	£000
Contract Inflation	200
Reduction in the cost of looked after children	650
Workforce structure	200
Total Childrens Wellbeing	1,050

29

Schools and high needs

- Funded by government grants (schools and academies £99.4m and high needs £24.5m).
- There is severe cost pressure on high needs spend at a national level for all councils – many are overspending.
- We forecast a £2m overspend within 3 years in Herefordshire if no action is taken.
- A cost reduction programme has been agreed with the schools forum and a fundamental service review is underway.
- £0.7m of savings identified so far (more to follow).

39

Local support of children's services

- Support families and communities to encourage healthy eating (particularly for children).
- A campaign is about to be launched which encourages good dental health.
- 27 • Encourage businesses to offer apprenticeships and work opportunities for young people (help them into employment).

£2.017m Economy, communities and corporate savings required in 2019/20

Savings Proposal	£000
Museum, library and archive services	250
Public and Community Transport	225
Public Realm / Annual Plan	125
Accommodation Strategy	360
ECC efficiencies	460
Procurement Savings	300
Property Services contract savings	200
Organisational Redesign savings	97
Total Economy, Communities and Corporate	2,017

Improving efficiency

- Reviewing public transport and making efficiency improvements across these contracts enabled early delivery of savings.
- Achieving our income targets from car parking will be challenging.
- Currently reviewing delivery options for museum, library and archive services.
- Our continuing investment in superfast broadband will make the county one of the country's most fibre connected areas.
- Fixing the roads is important to the economy of the county.

Capital programme

	2018/19 £000	2019/20 £000	2020/21 £000
Capital Investment Programme and Financing			
Total Expenditure	92,148	47,911	8,317
Prudential Borrowing	28,156	25,547	-
Grants and contributions	51,497	22,213	8,317
Capital Receipts	12,495	150	-
Total Funding	92,148	47,911	8,317

30

Budget consultation



- The main method for people to give their views on a variety of proposals will be via an online survey.
- The survey will be promoted through a mixture of digital and traditional communication channels.
- Targeted engagement with key stakeholder groups (elected members, parish councils, health partners, schools and businesses).

35



Meeting:	Herefordshire schools forum
Meeting date:	Friday 19 October 2018
Title of report:	Local and National School Funding update
Report by:	Director of Children and Families

Classification

Open

Decision type

This is not an executive decision

Wards affected

(All Wards);

Purpose and summary

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

- Herefordshire schools budget 2019/20
- f40 briefing on school funding
- High needs budget 2019/20
- DSG outturn 2017/18
- Apprentice levy - optimal use by schools

Recommendation(s)

That:

- (a) **School Forum consider inviting the Herefordshire MPs to attend a future meeting of forum to be briefed on school funding pressures in Herefordshire and the f40 campaign for fairer funding;**

- (b) **To consider the initial budget proposals for 2019/20 for schools and high needs and provide feedback to inform the local authority's annual school budget consultation process; and**
- (c) **the council be asked to adopt that**
 - (i) **Requests from local authority maintained schools for apprenticeships be made by a given point in the year, for efficient administration of the council's apprenticeship levy fund;**
 - (ii) **bids be assessed by a panel consisting of the OD Business Partner, HR Services Manager and School Finance Manager with at least three headteacher representatives from LA maintained schools who had paid into the council's digital account;**
 - (iii) **the deadline for 2018 should be set for a date in December to give time for communication with schools; and**
 - (iv) **the apprenticeship levy be included on the agenda for the schools leadership conference to be held on 23 November.**

Alternative options

1. Alternative options will be fully considered by the BWG prior to the BWG formulating final budget recommendations for consideration by Schools Forum in January 2019. At this stage only a preliminary view has been sought in order to determine how the budget proposals can be developed further.

Key considerations

2. UPDATE ON SCHOOL FUNDING 2019/20

a) f40 briefing on school funding

The Budget Working Group considered the briefing note produced by the f40 group, see appendix 1, and felt the note was an excellent but concise summary of the group's position on a number of issues relating to the funding of schools and noted that it would be distributed to all MPs. The f40 group was working with other interested groups and bodies to share information and co-ordinate their approach. Herefordshire had been fully involved in the preparation of the briefing note and as such it reflected Herefordshire's concerns on both school and high needs funding.

The BWG suggested that greater engagement by schools with Herefordshire's MPs would be useful and working group members were asked to think about how they could use any opportunity to involve local MPs to support the f40 position.

The f40 briefing paper would be presented to the schools forum and BWG proposed that the MPs be invited to attend a forum meeting in order to be briefed on school funding pressures in Herefordshire. Alternatively schools forum could send the f40 briefing paper to the MPs and seek their support for a fairer funding settlement for schools in Herefordshire.

b) Schools budget 2019/20

The BWG received an update on the forecast schools budget for 2019/20 (appendix 2). Figures had been calculated on estimated pupil numbers, and the promised 0.5% per pupil increase from the 2018/19 National Funding Formula (NFF).

Key points considered by BWG were:

- the government had reduced the amount for primary low prior attainment (from £1,050 to £1,022) , Herefordshire could decide whether to match this amount or continue to fund at the previous rate;
- a formulaic allocation of national pupil growth funding would be applied, Herefordshire had never benefitted from this before so the forum would be asked to agree criteria for how this funding would be allocated;
- forecasts suggested that there would be a surplus of possibly up to £300k once the NFF had been applied, the working group would be asked to consider options for utilising this surplus to be recommended on to the schools forum in January 2019;
- one option for the use of any surplus would be to fund the primary SEN protection fund, past consultation had shown that primary schools valued the scheme but some secondary schools did not want to subsidise it. This option, if adopted, would not require any top slice of secondary budgets.

3. High Needs Budget Proposals for 2019/20

The BWG received a presentation from the School Finance Manager and Head of Additional Needs on issues regarding the high needs budget for 2019/20 and options for making the required savings.

4. The key points highlighted were:

- a forecast savings target of up to £600k might be needed for 2019/20;
- there would be a risk of legal challenges if further reductions were made to top-up tariffs and post-16 tariffs;
- the matrix wording and structure was being refreshed but this was not specifically designed to deliver savings. It might deliver a modest reduction in the growth of EHC Plans in relation to marginal cases;
- there were no plans to revisit tariff values again this time;
- publication of the consultant report on Herefordshire's SEMH provision had been delayed due to the decision to bring the PRUs back as an LA maintained school. There were sensitivities around staffing and the TUPE process. It is the intention to share this in the next few weeks;
- it was recommended that the council should be clear on its duty to fund places for permanently excluded pupils and that schools should fund arrangements for pupils on managed moves;
- the size of the PRU needed to be reduced back to the level it was a few years previously where it only reached capacity at the end of the academic year;
- there was pressure from the government to improve the outcomes for pupils in PRUs, Herefordshire historically had had good Ofsted judgements;
- the PRU management committee was being reformed and included secondary school representatives, the school representative on the management committee needed to

Further information on the subject of this report is available from
Mr Malcolm Green, Tel: 01432 260818, email: Malcolm.green@herefordshire.gov.uk

work with the PRU to identify suitable models of delivery to meet the needs of client schools;

- savings were being sought in the central DSG services, full details could not be given at this point as some of the options could involve redundancies;
- a set of principles were set out to guide how savings should be delivered for high needs budgets.

5. In the discussion which followed the following was noted:

- it was queried whether the growth fund could be used to create additional special school places;
- that the charge to schools for a KS4 PRU place had increased quite rapidly in recent years but it still did not cover the full cost of a place, further background information on current PRU costs would be circulated;
- there were no permanently excluded (PEX) pupils in the primary phase, numbers in the secondary phase had doubled in the last 2 academic years;
- the closure of the Robert Owen Academy had boosted numbers in the PRU this year but some additional funds had been received from the DfE and all the pupils were in year 11;
- physical building space was a difficulty in the St David's centre;
- the issue had been discussed at HASH and there were different views among the schools, however all secondary schools tried not to exclude pupils;
- there was a recognition that all schools were working hard to support pupils but that there was also a need to manage pressures on budgets and plan for the longer term; there is further work to be done to arrive at a workable proposal;
- not all schools were aware of the additional offer from the behaviour support team for early years and KS1, this would be re-advertised;
- a SSIF bid for additional government funding had been unsuccessful, this was disappointing and alternatives needed to be considered;
- the projects supported by the early years underspend should have an impact over the longer term;
- reductions in school funding and other support services were putting pressure on the system;
- the proposed principles were fair and in the correct order;
- the Head of Additional Needs felt that the SEN protection scheme should be funded from the schools block, the protection scheme being essentially an insurance against having excessive demand on the notional SEN budget and the notional SEN budget being a part of the schools block and not the High Needs block.

DSG Outturn 2017/18

6. The details of the 2017/18 DSG outturn were set out for the BWG. In summary overall DSG was £271k underspend mainly due to an under spend of £327k on early years. The high needs budget was over spent by £125k. It was noted that current DSG balances were £1.2m (excluding the committed early years underspend) and that although times were challenging, Herefordshire was in a better position than many other authorities.

Apprentice Levy

7. The HR services manager summarised the report (appendix 3) which had been circulated with the agenda papers. She explained that her role was to facilitate spending of the levy fund pot for those maintained schools that paid in through their inclusion in the local authority

Further information on the subject of this report is available from
Mr Malcolm Green, Tel: 01432 260818, email: Malcolm.green@herefordshire.gov.uk

payroll i.e. community and voluntary controlled schools. The apprenticeship levy is a matter that the authority see fit to consult the forum on as it is a matter concerning the funding of schools.

8. Voluntary Aided schools with an annual payroll of under £3m are exempt from the levy and VA schools with a pay bill over £3m are required to have their own digital account (levy pot). VA schools are therefore not eligible to access the funds in the council pot. However, they are able to access funding for apprenticeships through an approved training provider and would only pay 10% of the costs. Academies with a payroll of more than £3m pay the levy and will have access to their own digital account.
9. HMRC upload funds in the council's digital account but does not differentiate between council staff and schools although efforts have been made to separate the two pools. The levy portion for any staff resident in Wales is transferred to the Welsh Assembly so the amount available to access will be less than that paid in.
10. Any levy not used within 2 years would be reclaimed by HMRC on a rolling monthly basis. Some qualifications were currently being funded in Herefordshire but schools were not making full use of funds and there was a risk that money would be lost. At the present time requests from schools to access the levy are considered by the OD Business Partner. All requests received to date had been accepted with one exception. Options to manage allocation of funds in the future were set out in the paper.
11. It was noted that training had to be through an approved provider and that apprenticeships had to last for a minimum of 15 months. It was necessary therefore to project forward when allocating the available levy funds. The levy could only be used to cover training costs, the salary of apprentices had to be covered by their employer.
12. In discussion of the item it was noted that:
 - option 2 (schools to use within clusters) would require an administrator;
 - the levy did not only fund course for administrators and teaching assistants, there were courses available for middle and upper leaders which could be offered, including online courses;
 - training was not limited to new members of staff;
 - option 4 (giving schools a specific deadline each year to submit bids for funding) could allow for cluster bids;
 - more communication was needed to help headteachers understand what was available, it would be useful to include some case studies of successful bids and what they had delivered;
 - any purchase over £5k had to go out to tender through the council, the cost of an apprentice training would vary depending on the level of the course studied, teaching assistant courses typically cost £3k, the management course given as an example was £9k;
 - teaching apprenticeships are available but require an individual to be degree qualified.
13. The BWG recommended that:
 - option 4, Requests for apprenticeships made at a given point in the year, be the preferred option for administration of the apprenticeship levy fund;

Further information on the subject of this report is available from
Mr Malcolm Green, Tel: 01432 260818, email: Malcolm.green@herefordshire.gov.uk

- that bids should be assessed by a panel consisting of the OD Business Partner, HR Services Manager and School Finance Manager with three or four headteacher representatives from LA maintained schools who had paid into the pot;
- the deadline for 2018 should be set for a date in December to give time for communication with schools; and
- the apprenticeship levy be included on the agenda for the leadership conference to be held on 23 November.

14. Tendering for school insurance

Members of the BWG were informed that the council would shortly be tendering for an insurance provider. Schools insurance would form a lot in their own right. A letter would be sent to schools to ask if they wished to be included in the bulk tender. Any school taking part would be bound by the outcome of the tender for 5 years. Any school choosing not to take part would have to make their own arrangements. There was an expectation that the bulk tender would result in a better rate.

Community impact

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

Equality duty

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

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

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

Resource implications

Further information on the subject of this report is available from
Mr Malcolm Green, Tel: 01432 260818, email: Malcolm.green@herefordshire.gov.uk

18. The schools budget is fully funded by Dedicated Schools Grant. At this stage the financial assessment is indicative only pending the final DSG announcement by government in mid-December 2018.
19. Forecast cost pressures on the high needs block indicate that without cost reductions in the Herefordshire Pupil Referral Service and the SEN support services the high needs budget will overspend in 2019/20. Options will be developed for consultation with schools and potentially service users to determine the preferred approach to maximising service delivery within the high needs allocation determined by government.

Legal implications

20. The School Forum is a decision making and consultative body in relation to matters concerning schools' budgets as defined in the School Finance (England) Regulations 2012 and the Schools Forums (England) Regulations 2012
21. The Schools Finance (England) Regulations 2012 determine those matters on which the council must or may consult the Schools Forum and those in respect of which the Schools Forum can make decisions. These Regulations make provision for the financial arrangements of councils in relation to the funding of schools.
22. The report complies with legal requirements in this regard.

Risk management

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

Consultees

24. No consultation has yet been undertaken with schools, providers or service users as there are currently no fully developed proposals suitable for consultation. Consultation with schools on the schools budget will follow after half term. Further work is necessary on the high needs budget before consultation can be undertaken.

Appendices

Appendix 1 f40 Briefing on school funding

Appendix 2 Budget proposals 2019/20

Appendix 3 Report to BWG on Apprenticeship Levy

Background papers

None identified.

School Funding Briefing – September 2018



f40's central aim over more than 20 years has been to influence a significant change in the way the government allocates funding to local authorities and schools. We seek fairness and equal opportunities in education for all children regardless of where they live, and to equip schools to provide a quality education for all children to meet the future needs of Britain.

The allocations for primary and secondary pupils in the authorities in the f40 group are among the lowest in the country. Following the government's consultations in 2016 and 2017, f40 hoped that the case for fair funding for schools had been won as the government agreed that the funding allocation system was unjustifiable and unfair. The introduction of a National Funding Formula (NFF) and additional funding for 2018-19 and 2019-20 were welcomed and f40 viewed the overall outcome as another step towards fairer funding.

However, regrettably the group continues to have fundamental concerns about the new formula and that the government has replaced one unfair system with another. The NFF falls short of what was expected, does not deliver true fairness and is, therefore, in need of fundamental change. Particular concerns are that the formula does not give enough to basic entitlement, allows too much for add-ons and that the arrangements lock in existing inequalities.

In the table below we have summarised our main concerns along with how these could be resolved. This list does not include all of our detailed and sometimes technical concerns and if you would like more information please contact us.

MAINSTREAM SCHOOLS

	WHAT?	WHY?	HOW?
45 1	f40 seeks a significant increase in the amount invested in education funding to meet the cost pressures facing all schools	<p>Cost pressures are significant for all schools, but those in the lowest funded areas have been forced to prioritise funding to meet core costs at the expense of improving outcomes for vulnerable pupils.</p> <p>Pay and inflationary cost pressures, such as teachers pay increases (which are only partially funded) are significant. Cuts in local government have pushed cost burdens to schools for aspects of youth work, parental support and social care. Equally, low funding for post-16 courses in schools have created additional pressures.</p>	<p>The government must take account of f40's index linked activity-led formula which sets out the true costs of delivering to Ofsted standards. This clearly shows the real cost of running a school. F40 believes the current funding shortfall in schools is £2bn pa.</p>
2.	f40 continues to argue for an index-linked activity-led formula to ensure sufficient funding in the system, which is correctly balanced to meet needs.	<p>Funding continues to be directed on historic considerations and the average of decisions made by local authorities that had different spending powers. There is no rationale: there is no understanding of the needs of schools or the needs of children.</p> <p>Providing an activity-based formula allows for future changes of policy direction and allows the government to create a world class system of education to allow our pupils to compete in the post-Brexit age with the rest of the world. Index linking this means that the activity-led formula can keep pace with the cost changes occurring around them.</p>	<p>f40 believes funding should be appropriately and correctly targeted to specific needs or ages with reference to an activity-led formula such as the well regarded f40 model.</p>

	WHAT?	WHY?	HOW?
3.	f40 seeks a review of the amount of funding for basic entitlement relative to the educational additional needs.	Schools cannot provide appropriate support for pupils with additional needs, from deprived backgrounds or with special educational needs if they cannot afford to run a core education for all. The basic entitlement funds the core cost of schools (e.g. teachers and heating) and must be sufficient to run the school before the costs of additional support are added to school budgets.	The NFF should be underpinned by f40's index-linked activity-led formula to set out the basic entitlement funding to meet the core cost of running a school and the extra cost of additional services for SEN and deprivation.
4.	f40 seeks one National Funding Formula (NFF) without the need for Minimum Funding Levels (MFL) and long-term locked-in protections.	One of the key principles set out in the early NFF consultations, supported by f40, was that pupils of similar characteristics should attract similar levels of funding wherever they are in the country (allowing for the area cost adjustment). Therefore, NFF should be applied to all schools on a consistent basis. However, the protections applied, such as the 0.5% funding floor, 'lock in' some of the historical differences for those schools which have been comparatively well funded for several decades.	The government must continue to develop the national formula so that it is fit for the future i.e. is fairer, more easily understood, transparent and adjustable. Transition to the new formula is sensible but locking in past inequalities is not.
5.	If the Minimum Funding Level is here to stay, then it should be fairly applied to take account of the additional educational needs (AEN) of individual schools.	The MFL is unnecessary. An activity-led NFF should undertake this role. The MFL is applied to bring schools up to an artificial minimum level, but schools with pupils with few additional needs are being funded at the same level of funding as a school with a greater number of additional needs pupils. This is not fair.	Ultimately, we wish to see the removal of the MFL, or in the short term it should be modified to take account of varying levels of additional education needs in the calculation.
6.	The NFF needs to cover all the funding for mainstream schools, not just the pupil-led elements.	Within the NFF there will always be elements that are individual to each school such as property related costs, e.g. business rates and sparsity. Funding for these cannot continue to be based upon historical costs.	The government must introduce mechanisms to deal with exceptional premises funding. Exceptional premises should be funded at realistic, not historical levels. F40 believes that all schools should be exempted from business rates with a one-off compensating cost adjustment nationally for local government.

	WHAT?	WHY?	HOW?
7.	f40 seeks continued funding flexibility to support specific local issues or organisational requirements.	No two schools in the country are exactly the same, but the formula assumes all schools are almost identical. There are good local reasons why some schools have costs that others do not have, and an inflexible national system cannot support these schools equitably. Some local flexibility is essential in achieving a fair formula that works and stands the test of time.	The government should allow an element/percentage of the formula to be targeted using local discretion (via the Schools Forum or similar representative group).
8.	f40 seeks to see plans for the funding formula beyond 2020 and the establishment of rolling 3-4 year budget settlements for schools which are inflation-proofed, including funding for cost-of-living increases.	<p>We understand what the final values of the NFF may be, though these are not yet achievable because of the funding shortfall. There is no information about funding for 2021-22, yet schools are expected to plan 3-5 years ahead. If there are changes to be made, schools need time to plan and achieve that change.</p> <p>School funding is dependent on Comprehensive Spending Reviews, but the education of children doesn't stop in the interim. The reality is that the vast majority of school budgeting is pre-determined. Why then is it necessary to hold back the whole school funding announcement in such circumstances.</p>	Whilst the CSR is an important government control, there is enough known about the system to make an educated estimate of future pupil numbers and future funding requirements. A 3-4 year rolling settlement could be achieved for the vast majority of funding without Parliament losing control of what it wants to achieve.

PUPILS WITH SPECIAL EDUCATIONAL NEEDS (SEN) OR OTHER ADDITIONAL EDUCATIONAL NEEDS

9.	f40 seeks an appropriate quantum of funding be made available for the high needs block (which should be index-linked).	<p>The demand for high needs funding is out-stripping the budgets available to local authorities across the country, resulting in serious deficits in the high needs block in over half of all local authorities. Many are finding it extremely difficult to recover these deficits and cuts to existing high needs services and pupil top-up funding makes what provision that is available simply unsustainable.</p> <p>There is an emerging crisis in high needs funding, created in part by the continued use of historic funding levels, that f40 urges the government to address before permanent damage is done to very many vulnerable pupils. The Department for Education's short-term attempts to fix the problem are woefully inadequate.</p> <p>The complexity of the high needs services demanded by more and more children (and their parents) is far greater than was the case just a few years ago, more accurate medical assessment and improved methods of treatment increase demand still further. Such increasing needs requires recognition through the national high needs formula.</p>	f40 is calling for an immediate injection of new funding, estimated on increased costs and demand since 2015 as at least £1.5bn pa, and the introduction of an annual index-linked review for this block. This is the block of funding that supports the most vulnerable pupils in our schools: those with complex SEN, those who are excluded or at risk of exclusion and those that cannot access education for medical reasons. A review of SEN policy and guidance is also required to help manage down demand more effectively.
----	---	--	--

EARLY EDUCATION FOR PUPILS UNDER 5 YEARS OLD

	WHAT?	WHY?	HOW?
10.	f40 seeks a review of the early years national formula to make it fit for future use, together with an increase in the quantum of funding for early years providers to take account of the pressures of the living wage and the impact of 30 hours.	<p>There have been no universal increases in funding rates for early years providers, yet the cost of introduction of the living wage and separately increased employer costs are having a significant impact on the nursery sector, which traditionally employs a higher proportion of low paid workers than many other employment sectors. Providers are expected to implement 30 hours for working parents which means more of their working week at the national rate, with fewer opportunities to cover any shortfall in costs. Thus, providers are finding it increasingly difficult to provide early education.</p> <p>Many f40 nursery schools are outstanding and are set in areas of disadvantage. Nursery schools are required through regulation to have unique cost factors so moving to a single hourly rate across all providers will not be sustainable. The uncertainty over future plans is causing turbulence in our schools which is unhelpful.</p>	<p>There must be an immediate injection of new funding and the introduction of an annual index-linked review for this block.</p> <p>The government must change the rules so that local authorities are able to properly fund nursery schools.</p>

OTHER

48	11.	f40 seeks clarity on the way that the Central Schools Services Block will work and be increased in future.	Not all funding to support education is directed via the NFF. Funding that is directed by the Central Schools Services Block for services such as combined budgets are being funded at historic levels and not keeping pace with the requirements that are made on them.	The central services block should be index linked to meet increasing costs.
	12.	f40 wants to see parity with Multi Academy Trusts	f40 understands that MATs are different to maintained schools and are part of the future landscape for schools, but we would like to see MATs being held more accountable for some of the decisions that they make, especially with regard to pay and distribution of funding between individual academies in the MAT. A national funding formula means equality for all schools, including those in MATS. .	Through appropriate legislation.
	13.	f40 seeks a review of the way that Home to School Transport is funded and used.	<p>We recognise that Home to School Transport is not part of the Dedicated Schools Grant. However, it is an ongoing problem for rural authorities, particularly as more schools become academies. Costs are rising faster than funding leading to significant restrictions on school transport locally. Local authorities have lost strategic control but are required to provide services in accordance with the legislation but with declining funding. SEN Transport is also a growing problem with costs continuing to rise as a result of the growing SEN population and the challenge in finding available appropriate placements.</p>	Through legislative change and additional funding. Government needs to recognise the real impact of reducing school transport on pupil choices.

The f40 group represents 41 English local authorities with historically low funding for education, representing over 2.83 million pupils in over 9,000 schools. We have been campaigning for a fairer system for the allocation of funding for schools for over two decades. f40 is a cross-party group which has the support of MPs, councillors, education directors, governors, head teachers, parents and teaching union representatives. A full list of member authorities is available on our website at www.f40.org.uk

Budget Planning 2019/20

1. Schools Budget

Estimated pupil numbers 22,346	£100.6m
--------------------------------	---------

National Funding Formula 2018/19 factor + 1/2 % increase	£100.5m
---	---------

Potential unallocated	£100k
-----------------------	-------

As this covers the additional thresholds of £6,000 that are paid from the schools block to primary schools- can this be used to fund the primary SEN protection scheme? Note – no impact on secondary school budgets. Views of BWG?

It is proposed that consultation with schools will be through Spotlight.

2. High Needs Block

Provisional high needs allocation	£14.835m
-----------------------------------	----------

Actual 2018/19 allocation	£14.577m
---------------------------	----------

Potential increase (+1.7%)	£257k
----------------------------	-------

3 High needs budget pressures – to be found

a. <u>One-off funding from schools block</u>	£324k
--	-------

b. Pupil Referral Unit

Increased LGPS pension costs PRU/H3	£62k
-------------------------------------	------

TP increased employer costs +7.12% Sept 19	£30k pa
--	---------

c. SEN Support Services

teachers pay award average 2.25%	£12k
----------------------------------	------

(Assume not funded as pay grant on pupil numbers)

TP increased employer cost (incl H3)	£35k
--------------------------------------	------

d. potential growth in H3/PRU

based on 2018/19 PRU £60k H3 £20k	£80k
-----------------------------------	------

e. Special school numbers

10 places at £10k +£10k top ups £200k

f. Independent special places

current forecast overspend £100k

Total Cost pressures £844k

Less additional DSG -£257k

High needs savings target £586k

Hence working savings target	£600k.
-------------------------------------	---------------

Options - for discussion and further development

1. Restructure PRU to statutory places only

Early in Summer term 2018 we commissioned an external consultant to conduct a review of our SEMH provision. This report will be available in the near future with management response from the council. In relation to the work of the PRU it recommends that we provide clarity on the council's statutory duty to provide services to permanently excluded pupils and the responsibility of schools for all other pupils.

Consequently the following course of action is proposed for consultation:

Reduce PRU to statutory places only and pass financial responsibility for all other places to schools from September 2019. This will require schools and the PRU management committee to agree an operating model which meets the needs of schools and these pupils and yet is financially sustainable for the PRU. The financial implications are potentially as follows, for example:

Reduce places for PEX pupils from 80 to 50 £300k

Reduce top-ups pro-rata i.e. $\frac{3}{8} * 65 * £5,700$ £140k

Split reductions 3 ways for example, as follows:

50% as savings = £220k

Increase PRU top up by £1,000 per pupil -£50k

Delegate remainder to high schools who meet a minimum FSM threshold -£170k

Savings proposals for PRU from Sept 2019	£220k
--	-------

Note 1: These proposals will increase the non-statutory PRU charges to a minimum £15,700 (and potentially £16,700 including the increase in top-up) for discretionary places should schools place pupils.

Note 2: The council's expectation is that the PRU will save £100k in the next two- three years and recover the remaining £120k from charges for non-PEX places. Further financial modelling is necessary to ensure a sustainable PRU service. This will be done for the next BWG in consultation with the PRU Management committee and detailed analysis of the external consultant's report. DSG balances are available to support the implementation of the new operating model in the short term.

Note 3: Currently the council receives £265k income from PRU charges in 2017/18. This income will reduce under the proposed model and further consideration will be necessary as to how best to replace this income. Detailed proposals will be discussed at the BWG and with HASH.

2. Savings package for SEN support services (£1.3m)

Options include trading, maximising grants, vacancy savings,	
Reducing overheads and challenging recharges	£190k

Say 50% from April/ 50% Sept

3. Complex Needs Funding – proposed extra savings £50k

Additional to £80k in 18/19.

4. SEN protection scheme for Primaries

Already agreed to increase cap to £140/pupil on roll £40k

5. Addition £100k to be found to cover growth in independent special school placements.

6. In principle we only intend to use DSG balances to fund implementation/transition phasing.

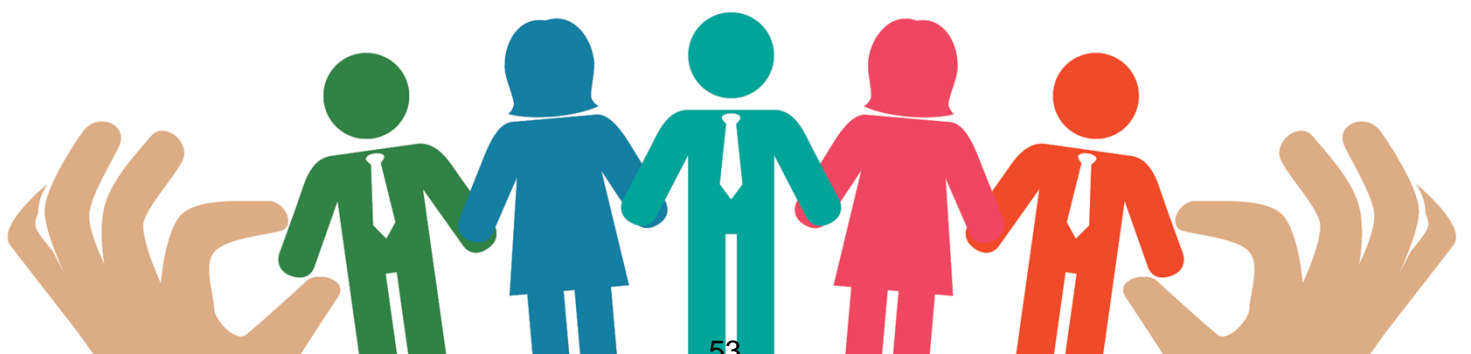
Apprenticeship Levy

Using the apprenticeship funding - Schools

Hoople Ltd

2nd October 2018

To provide an update on the apprenticeship levy and various options available to ensure optimised use of funds to support schools.



Apprenticeship Levy

1. Purpose of report

To provide an update on the Apprenticeship Levy and the approach which ensures the optimised use of it to support maintained (Community and Voluntary Controlled) schools in Herefordshire.

This paper is for the Budget Working Group to agree an approach to spending the levy which was approximately £130k in 2017/18. The forecast for 2018/19 is approximately £135k. Schools have used approximately £13k from the 17/18 levy funding. Figures are approximate as no accurate split between HC and schools funding is available via the digital portal. Funding is valid on a rolling 2 year period, ie funds added to the account in July 2017, if not used will be returned to HMRC in July 2019.

Schools which are excluded from the recommendations of this paper:

- Academies
- Voluntary Aided and Foundation
- Trust

2. Recommendations

Agree an approach to spending the levy by deciding to implement one of the following options:

- **Option 1** – schools only use what they pay in
- **Option 2** – Schools to utilise within School Clusters
- **Option 3** – first come first served
- **Option 4** – requests submitted at single point in year
- **Option 5** – do nothing and pay the levy

3. Relevance to Strategic Plans

The Government is committed to delivering three million apprenticeship starts by 2020. The aim and impact of the levy is to:

- Increase the number of apprenticeships in the public sector
- Improve the capacity and capability of the public sector
- Help to meet the government's commitment to delivery 3 million apprenticeships by 2020
- Ensure the public sector is leading by example in terms of the number and quality of apprenticeships

4. Background

The Apprenticeship levy came into effect on 6 April 2017 and applies to all employers with a pay bill of £3m or more. The key points specific to schools are:

- The levy is based on 0.5% of schools' total pay bill which is then credited to a digital account

- The cost of the levy to individual schools is reflected in school budgets
- A 10% top-up by government is made to the levy funds. This is paid monthly at the same time the funds enter the digital account
- Employers who pay into the levy will be able to use the money to fund training and assessment costs but not for wider costs such as salaries for apprentices
- Each monthly credit to the account is valid for a rolling 24 month period and is cumulative
- Schools cannot spend what has not been accrued in the digital account but could plan programmes accordingly
- If a school becomes an academy part way through the year then the academy's governing body or trust will be responsible for the apprenticeship levy from this point (assuming a £3m+ pay bill). Payments made into the digital account prior to conversion will not be transferable.

5. What is an apprentice?

- Apprentices are aged 16 or over and combine working with studying for a work-based qualification
- Working towards achieving a Government approved apprenticeship scheme
- Apprentices can be new or current employees
- An apprentice must be paid at least the minimum wage during their placement
- 20% off the job training
- An apprentice must:
 - Work with experienced staff
 - Earn job-specific skills
 - Study for a work based qualification during their working week

There are a number of existing apprenticeships relevant to schools that include:

- A teaching apprenticeship – replicates standards of Initial Teaching Training Programmes
- School business manager apprenticeship
- Teaching assistant apprenticeship

Apprenticeship level:

- Intermediate apprenticeships – Level 2 (equivalent to 5 GCSE passes)
- Advanced apprenticeships – Level 3 (equivalent to 2 A level passes)
- Higher apprenticeships – Level 4-7 (equivalent to Foundation degree and above)
- Degree apprenticeships – Level 6 & 7 (equivalent to full Bachelor Master's degree)

There are 15 proposed funding bands ranging from £1,500 to £27,000 set by government for each apprenticeship dependent on level and estimated cost of training.

6. Proposals

The average value for each levy paying school is unlikely to be sufficient to fund most training programmes. Therefore, the following four options are proposed to use the funding held in the digital account:

	Options	For	Against
1.	Individual schools only use funds from the digital account that they have paid in	Fair in that no school uses another school's levy contribution	i) Average levy payment would not fund an apprenticeship ii) Real possibility given average size of contribution that schools may not maximise use of levy iii) Small schools will lose their funding before accumulating sufficient funds to spend
2.	Schools to utilise within School Clusters	i) Clear plan as to where to target the training need ii) Should maximise the use of the levy iii) Planned through School Clusters	i) Schools may not have opportunity to use the levy ii) Would require an added layer of governance/decision making
3.	Use on a first come first served basis.	i) Promotes schools to be proactive in securing apprenticeship (confirmation of funding by HC) ii) Maximises spend and minimises any funds being returned to government iii) Easy to administer	i) Unfair distribution of funding ii) Some schools may not have immediate need for apprenticeships
4.	Requests for apprenticeships made at start of financial year (or at a given point in the year)	i) Benefits as Option 3 (above) but fairer ii) Money allocated based on need iii) Equal opportunity for all	If not planned at start of year, further funding unlikely to be available
5.	Do nothing – pay the levy and take no further action	Minimal governance or control required	Loss of approximately £130k of funding each year

7. Next steps

The fairest of all the above options would seem to be Option 4. HR can undertake the administration provided that there are headteachers representatives to agree the priority order of applications.



Meeting:	Herefordshire schools forum
Meeting date:	Friday 12 October 2018
Title of report:	Local management of schools directed changes
Report by:	Director for children and families

Classification

Open

Decision type

This is not an executive decision

Wards affected

(All Wards);

Purpose and summary

The Department for Education has issued a directed change to the council's local scheme for managing schools. Schools Forum is asked to approve the change. The directed change is to ensure that loans agreed by the council with schools in future are for capital purposes only.

Recommendation(s)

That: The Herefordshire scheme for financing schools be amended as follows

(a) Add a new para 4.10 (f) as follows:

“Loans will only be used to assist schools in spreading the cost over more than one year of large one-off individual items of a capital nature that have a benefit to the school lasting more than one financial or academic year. Loans will not be used as a means of funding a deficit that has arisen because a school's recurrent costs exceed its current income. If loans are made to fund a deficit and a school subsequently converts to academy status, the Secretary of State will consider using the power under paragraph 13(4)(d) of Schedule 1 to the Academies Act 2010 to make a direction to the effect that such a loan does not transfer, either in full or part, to the new Academy school.”

(b) Replace the existing paragraph 4.8 as follows

“Where in the funding period, a school has been established or is subject to a prescribed alteration as a result of the closure of a school, a local authority may add an amount to the budget share of the new or enlarged school to reflect all or part of the unspent budget share (including any surplus carried over from previous funding periods) of the closing school for the funding period in which it closes”

(c) Add an additional paragraph to Annex F as follows

“A local authority can retain a central budget within the schools budget to fund the costs of new early retirements or redundancies by a deduction from maintained school budgets (excluding nursery schools) only, where the relevant maintained school members of the school forum agree to a de-delegated budget in accordance with Schedule 2 Part 7, of the Finance Regulations.”

Alternative options

1. The Secretary of State may by direction revise the whole or any part of the scheme for financing schools from such date as specified in the direction. There are no alternatives.

Key considerations

2. In order to make a directed revision to schemes, the Secretary of State is required by provisions in the Schools Standards and Framework Act 1998, to consult the relevant local authorities and other interested parties. Following consultation, the Secretary of State directs that from 22 March 2018 the text below shall be incorporated into the schemes of all local authorities in England.

Loans will only be used to assist schools in spreading the cost over more than one year of large one-off individual items of a capital nature that have a benefit to the school lasting more than one financial or academic year. Loans will not be used as a means of funding a deficit that has arisen because a school's recurrent costs exceed its current income. If loans are made to fund a deficit and a school subsequently converts to academy status, the Secretary of State will consider using the power under paragraph 13(4)(d) of Schedule 1 to the Academies Act 2010 to make a direction to the effect that such a loan does not transfer, either in full or part, to the new Academy school.

3. Updates have been made to the DfE's guidance, to mirror changes in the Schools and Early Years Finance (England) regulations 2018. Paragraph 4.8 has been updated to reflect changes on balances of closing schools as detailed under Regulation 25(9) as follows:

4.8 Where in the funding period, a school has been established or is subject to a prescribed alteration as a result of the closure of a school, a local authority may add an amount to the budget share of the new or enlarged school to reflect all or part of the unspent budget share (including any surplus carried over from previous funding periods) of the closing school for the funding period in which it closes.

4. Annex B: Responsibility for redundancy and early retirement cost has been updated to reflect changes under Schedule 2 Part 7, of the Finance Regulations. This details how a local authority can retain a central budget within the schools budget to fund the costs of new early retirements or redundancies by a deduction from maintained school budgets (excluding nursery schools) only, where the relevant maintained school members of the schools forum agree.
5. This is a directed revision and as such all local authorities must update their schemes and ensure any new loans are in line with the criteria. From the 22 March 2018, DfE expects new loans to be made in line with the provision in schemes. Where a maintained school converts to academy, it will only continue to repay any new loan or changes to an existing loan agreed between the local authority and its predecessor maintained schools if it meets the criteria below

“to assist the school in spreading the cost over more than one year for a large one-off individual item of capital nature that has had/will have, a benefit to the school lasting more than one financial year “
6. From the 22 March 2018, the Secretary of State would consider whether to make a direction under paragraph 13(4)(d) of the Academies Act 2010, to the effect that a new loan would not transfer to the new academy school on a case by case basis and all applications would be viewed on their own merits. Every decision will take into account the purposes of the loan and if it is compliant with revised guidance. The revision to the criteria for agreeing loan schemes will not be applied retrospectively to existing loans when schools convert.
7. The recommended changes to the Herefordshire scheme for financing schools are set out in the appendix.

Community impact

8. In accordance with our code of corporate governance, Herefordshire Council is accountable for how it uses the resources under its stewardship, including accountability for outputs and outcomes achieved. In addition the council has an overarching responsibility to serve the public interest in adhering to the requirements of legislation and government policies. The council is committed to ensuring openness and transparency and the recommendations of this report demonstrate the reasons for a policy change being made.

Equality duty

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

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

- (a) eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act;
- (b) advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;

- (c) foster good relations between persons who share a relevant protected characteristic and persons who do not share it.
10. As this is a directed revision by the Secretary of State, we do not believe that it will have an impact on our equality duty

Resource implications

11. Currently outstanding loans total £835,917 and are split 20.7% capital and 79.3% revenue. There are 14 loans in total and 9 loans are each less than £20,000. All loans are on track to be repaid.

Legal implications

12. The recommended amendments to the Scheme are in accordance with updates to the Department for Education Guidance to reflect changes in the Schools and Early Years Finance (England) Regulations 2018. Department for Education Schemes for financing schools Statutory Guidance for local authorities March 2018 states that councils are required to publish schemes for financing schools setting out the financial relationship between them and the schools they maintain. In making any changes to their schemes, councils must consult all schools in their area and receive the approval of members of their schools forum representing maintained schools. Councils must take this guidance into account when revising their schemes, in consultation with the schools forum.

Risk management

13. The council will fully comply with the revisions to the scheme in so far as only capital loans that comply with the scheme requirements will be approved.

Consultees

14. All locally maintained schools have been consulted and no comments received. A copy of the amended scheme will be distributed to all locally maintained schools in September 2018. The council's S151 officer has been consulted and is content with the proposed changes to the scheme of delegation to schools.
15. This matter was considered by the Schools Forum at its meeting of 6 July 2018. As the meeting was inquorate the forum was not able to make a binding decision but members present indicated their support for the recommendations.

Appendices

Summary of recommended changes to the Scheme for financing schools in Herefordshire

Background papers

None

Summary of Recommended changes to the Scheme for financing schools in Herefordshire

4.8 Balances of closing and replacement schools

New text:

Where in the funding period, a school has been established or is subject to a prescribed alteration as a result of the closure of a school, a local authority may add an amount to the budget share of the new or enlarged school to reflect all or part of the unspent budget share (including any surplus carried over from previous funding periods) of the closing school for the funding period in which it closes.

Deleted text:

When a school closes, any balance (whether surplus or deficit) reverts to the Council. It cannot be transferred as a balance to any other school, even where the school is a successor to the closing school except that a surplus transfers to an academy where a school converts to academy status under section 4(1)(a) of the Academies Act 2010. The allocation regulations make provision for successor schools to receive additional sums through the in-year supplement mechanism

4.10 Loan scheme – add new paragraph (f)

- a) The Council operates a form of loan arrangement for schools by way of actual payments to schools or expenditure in respect of a particular school, on condition that a corresponding sum is repaid from the school's formula budget (by the end of four years from the date of the loan). The loans are available to fund one-off purchases of equipment and certain types of capital works, and are allocated under arrangements determined by the Director of Children's Services and the Council's Chief Financial Officer. The maximum amount allowed for any one school is limited to 2% of the school's own formula allocation. Schools must be able to demonstrate their capacity to repay the loan and interest. Details of the loan scheme are included in Annex H.
- b) The loans will be financed in effect, subject to consultation with schools, by the balances in hand held within the Council's Accounts on behalf of the schools. The statutory right of schools to draw on their balances at any time will not be affected.
- c) The Council's budget statements show the amount centrally retained for devolved loan payments to schools, and the payments also appear in the out-turn statements.
- d) The loan scheme can operate only in respect of expenditure deductible from the ISB under the s.46 regulations.
- e) No provision has been made for any credit union approach to loans.
- f) Loans will only be used to assist schools in spreading the cost over more than one year of large one-off individual items of a capital nature that have a benefit to the school lasting more than one financial or academic year. Loans will not be used as a means of funding a deficit that has arisen because a school's recurrent costs exceed its current income. If loans are made to fund a deficit and a school subsequently converts to academy status, the Secretary of State will consider using the power under paragraph 13(4)(d) of Schedule 1 to the Academies Act 2010 to make a direction to the effect that such a loan does not transfer, either in full or part, to the new Academy school.

ANNEX F: add new final paragraph

RESPONSIBILITY FOR REDUNDANCY AND EARLY RETIREMENT COSTS

This guidance note summarises the position relating to the charging of voluntary early retirement and redundancy costs. It sets out what is specified in legislation and provides some examples of when it might be appropriate to charge an individual school's budget, the central Schools Budget or the local authority's non-schools budget.

Section 37 of the 2002 Education Act says:

(4) costs incurred by the local education authority in respect of any premature retirement of a member of the staff of a maintained school shall be met from the school's budget share for one or more financial years except in so far as the authority agree with the governing body in writing (whether before or after the retirement occurs) that they shall not be so met

(5) costs incurred by the local education authority in respect of the dismissal, or for the purpose of securing the resignation, of any member of the staff of a maintained school shall not be met from the school's budget share for any financial year except in so far as the authority have good reason for deducting those costs, or any part of those costs, from that share.

(6) The fact that the authority have a policy precluding dismissal of their employees by reason of redundancy is not to be regarded as a good reason for the purposes of subsection (5); and in this subsection the reference to dismissal by reason of redundancy shall be read in accordance with section 139 of the Employment Rights Act 1996 (c. 18).

The default position, therefore, is that premature retirement costs must be charged to the school's delegated budget, while redundancy costs must be charged to the local authority's budget. In the former case, the local authority has to agree otherwise for costs to be centrally funded, while in the latter case, there has to be a good reason for it not to be centrally funded, and that cannot include having a no redundancy policy. Ultimately, it would be for the courts to decide what was a good reason, but the examples set out below indicate the situations in which exceptions to the default position might be taken.

Charge of dismissal/resignation costs to delegated school budget

- If a school has decided to offer more generous terms than the authority's policy, then it would be reasonable to charge the excess to the school
- If a school is otherwise acting outside the local authority's policy
- Where the school is making staffing reductions which the local authority does not believe are necessary to either set a balanced budget or meet the conditions of a licensed deficit
- Where staffing reductions arise from a deficit caused by factors within the school's control
- Where the school has excess surplus balances and no agreed plan to use these
- Where a school has refused to engage with the local authority's redeployment policy

Charge of premature retirement costs to local authority non-schools budget

- Where a school has a long-term reduction in pupil numbers and charging such costs to their budget would impact on standards
- Where a school is closing, does not have sufficient balances to cover the costs and where the central Schools Budget does not have capacity to absorb the deficit
- Where charging such costs to the school's budget would prevent the school from complying with a requirement to recover a licensed deficit within the agreed timescale
- Where a school is in special measures, does not have excess balances and employment of the relevant staff is being/has been terminated as a result of local authority or government intervention to improve standards

A local authority can retain a central budget within the schools budget to fund the costs of new early retirements or redundancies by a deduction from maintained school budgets (excluding nursery schools) only, where the relevant maintained school members of the school forum agree to a de-delegated budget in accordance with Schedule 2 Part 7, of the Finance Regulations



Meeting:	Herefordshire Schools Forum
Meeting date:	Friday 12 October 2018
Title of report:	Review of Budget Working Group Membership
Report by:	Clerk to Herefordshire Schools Forum

Classification

Open

Decision type

This is not an executive decision

Wards affected

All wards

Purpose and summary

To review the membership of the budget working group.

The composition of the forum is reviewed annually to ensure that Local Authority maintained schools and academies are represented proportionately on the forum, based on the number of pupils registered in each category of school, and that the membership complies with regulations. The term of service of current members of the forum is coming to an end and arrangements must be made to elect the new membership for the next three year term.

Recommendation(s)

That:

- (a) **the allocation of seats on the budget working group be adjusted in line with the outcome of the proportionality review by reducing the number of seats allocated to local authority maintained secondary schools to one and increasing the number of seats allocated to academies to five.**

Alternative options

1. The forum could choose to disregard proportionality in respect of the budget working group and retain the current allocation of seats. This option is not recommended as it is preferable for the effective functioning of the working group that the different types of schools in Herefordshire are fairly represented and the forum has previously determined that the working group should be broadly proportionate.

Further information on the subject of this report is available from
Sarah Buffrey, Tel: 01432 260176, email: sarah.buffrey@herefordshire.gov.uk

- The forum could choose to adjust the number of seats on the working group in order to bring membership in line with proportionality. This is not recommended as the working group is currently an appropriate size to give a diverse range of input while remaining manageable for the detailed and technical work it carries out.

Key considerations

- The Budget Working Group is a permanent advisory sub-group of the forum. Regulations prescribe how the forum itself is to be constituted but these provisions do not apply to the composition of sub-groups. The composition of the Budget Working Group is therefore a matter for the forum itself. It is open to the forum to agree to disregard proportionality for the working group, amend the number of seats or set minimum representation for particular groups
- The forum agreed in October 2012 that the Budget Working Group would consist of 14 members. Two seats were allocated to early years settings and one to special schools. The remaining 11 places available to primary schools, secondary schools and academies, were to be allocated on a broadly proportionate basis based on pupil numbers in each category. The forum also agreed that there should be a minimum of one maintained school representative from the secondary sector and one academy representative from the primary school sector.
- Total pupil population in mainstream schools was 23,165, broken down as follows:

School category	Number of pupils	Proportion	Proposed number of seats (rounded)	Current number of seats
Maintained Primary	10,078	43.5%	4.79 (5)	5
Maintained Secondary	3,181	13.7%	1.51 (1)	2
Academies	9,906	42.8%	4.70 (5)	4
Total			11	11

- There has always been a need to round up or down to achieve the final allocation of seats. The proportion of pupils in maintained secondary schools has been falling since 2013 and it is increasingly difficult to justify rounding up the allocation of seats for this group while rounding the academies allocation down. In order to remain broadly proportionate to the numbers of pupils it is recommended that the number of seats allocated to the maintained secondary category be reduced from two to one and the number of seats allocated to the academies group is increased from four to five.

Community impact

- The items considered and decisions made by the forum should have regard to what matters to schools and settings in Herefordshire and how the forum can best contribute to managing the current changing and challenging financial circumstances.
- The constitution ensures that the membership of the schools forum continues to reflect the range of types of school and setting across Herefordshire and that all groups have the opportunity to shape the decisions of the forum.

Equality duty

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

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

 - (a) eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act;
 - (b) advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;
 - (c) foster good relations between persons who share a relevant protected characteristic and persons who do not share it.
10. The public sector equality duty (specific duty) requires us to consider how we can positively contribute to the advancement of equality and good relations, and demonstrate that we are paying 'due regard' in our decision making in the design of policies and in the delivery of services. In relation to schools finance it is the responsibility of individual governing bodies to commit expenditure according to the individual pupil need. However the decisions of the schools forum should have regard to this duty and the potential implications of any decisions made.

Resource implications

11. A budget of £12,000 has been allocated for administering the schools forum and associated activities for the 2018/19 financial year. This is funded from the dedicated schools grant received from central government and includes a modest budget for the commissioning of expert advice and reviews.

Legal implications

12. The schools forum is established under section 47A of the School Standards and Framework Act 1998. The current regulations pertaining to the operation and management of schools forums are set out in The Schools Forums (England) Regulations 2012.
13. The Education & Skills Funding Agency (ESFA) set out guidance on the operation of schools forums in September 2017. This document also gives examples of good practice which the EFA have drawn from a number of schools forums and the Department for Education. It is not designed to be prescriptive except where it refers directly to the Schools Forum Regulations 2012.
14. The council must ensure that the schools forum for their area is constituted in accordance with the regulations and is responsible for determining the size and composition of the forum, and the members' terms of office.

Risk management

15. There are no identified risks associated with approval of the recommendations contained in this report. If the recommendation to adjust membership of the working group is not supported there is a risk some categories of schools could feel that they are not fairly represented.

Consultees

16. Members of the budget working group have been consulted on the proposed adjustment to the allocation of seats.
17. This matter was considered by the Schools Forum as part of the annual membership review on 6 July 2018. As that meeting was inquorate no binding decision could be taken but members present expressed their support for the recommendation.

Appendices

None

Background papers

None



Meeting:	Schools Forum
Meeting date:	Friday 19 October 2018
Title of report:	Work programme 2018/19 and dates for future meetings
Report by:	Clerk to Herefordshire Schools Forum

Classification

Open

Decision type

This is not an executive decision.

Wards affected

(All Wards);

Purpose and summary

To confirm scheduled dates for meetings of the Schools Forum during 2018/19 municipal year and to consider the Forum's work programme for that period.

The schools forum needs to develop a manageable work programme to ensure that it operates efficiently and has sufficient information and time to properly consider the issues placed before it. A clear work programme will ensure that members of the forum and presenting officers know the pieces of work to be considered at each meeting and can prepare appropriately. It will also help to ensure that decisions are made at the appropriate time to meet external deadlines set by the Department for Education and others.

Recommendation(s)

- (a) **the work programme for the schools forum for 2018/19 at appendix A be considered and the forum advises of any amendments it wishes to make; and**
- (b) **the dates for meetings of the schools forum during 2018/19 be confirmed.**

Alternative options

1. The forum could choose not to establish a work programme for 2018/19 and rely on items being presented on an ad hoc basis for consideration at each meeting. This is not recommended as it could lead to the workload being spread unevenly across the year and to decisions not being taken in time to meet internal and external deadlines.

Key considerations

2. It is for the schools forum to determine its work programme to reflect the priorities and challenges of Herefordshire schools and settings. The forum needs to ensure that it fulfils its statutory role in relation to the implementation of the national schools funding formula and provides timely advice to the Local Authority on issues relating to the management of the schools budget.
3. In considering its work programme, the forum should be mindful of the key milestones during the financial and academic year and the decisions that surround these. Fixed deadlines, particularly those set externally by the Department for Education and others, must be taken into account.
4. In addition to the statutory items it is required to be consulted on, the forum may wish to undertake or be requested to undertake research and consultation on issues relating to the management of schools budgets including:
 - a. the national schools funding formulas;
 - b. ways for schools to use funds more effectively or efficiently;
 - c. arrangements for the education of pupils with special educational needs;
 - d. arrangements for the use of pupil referral units and the education of children otherwise than at school; and
 - e. arrangements for early years education.

Any such pieces of work should have a clearly defined remit and desired outcome and be appropriately resourced.

5. The budget working group is a permanent advisory sub-group of the forum which provides additional consideration of, and recommendations regarding, key budgetary options and related issues. In addition to the standard budgetary items the forum may refer other items for consideration by the budget working group or establish specific task and finish groups as it deems necessary. Items referred to any sub-group of the forum should be added to the work programme with a clear indication of when the sub-group is expected to report back to the forum.
6. The schools forum is required to meet at least four times a year. It is proposed that at least one meeting is set for each term. At its meeting of 23 March 2018 the forum agreed that a meeting be scheduled for 7 December 2018. There being no business presently identified for the meeting of 7 December 2018 it is proposed that this meeting be cancelled, unless the schools forum identifies additional items to be considered.
7. Proposed dates are as follows, each to start at 9:30am unless otherwise agreed:

Friday 25 January 2019
Friday 15 March 2019
Friday 14 June 2019

Community impact

8. The items considered and decisions made by the forum should have regard to what matters to schools and settings in Herefordshire and how the forum can best contribute to managing the current changing and challenging financial circumstances

Equality duty

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

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

- (a) eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act;
 - (b) advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;
 - (c) foster good relations between persons who share a relevant protected characteristic and persons who do not share it.
10. The Equality Act 2010 established a positive obligation on local authorities to promote equality and to reduce discrimination in relation to any of the nine 'protected characteristics' (age; disability; gender reassignment; pregnancy and maternity; marriage and civil partnership; race; religion or belief; sex; and sexual orientation). In particular, the council must have 'due regard' to the public sector equality duty when taking any decisions on service changes.
 11. Any potential detrimental impact on vulnerable pupils will be managed by school governing bodies prioritising vulnerable pupils within the school's grant income.

Resource Implications

12. A budget of £12,000 has been allocated for administering the schools forum and associated activities for the 2018/19 financial year. This is funded from the dedicated schools grant received from central government and includes a modest budget for the commissioning of expert advice and reviews.

Legal implications

13. The schools forum is established by virtue of S74A of the School Standards and Framework Act 1998 (as amended by the Education Act 2002). The Schools Forums (England) Regulations 2012 prescribe the functions of the forum and the duties of the local authority to consult with the forum on school funding issues. The Education Funding Agency provides a summary of powers and responsibilities of schools forums which includes decisions it can make on proposals put forward by the local authority.

Risk management

14. Approval of the recommendations will help to ensure that the forum fulfils its statutory functions and that the council complies with its statutory duty to consult the forum as specified in the regulations. Failure to approve the recommendations (or suitable alternatives) may lead to the forum not having adequate time and information to make

recommendations, which would require the council to make decisions in the absence of guidance from the schools forum. This could lead to action by the DfE or decisions being taken which are not in the best interests of, or supported by, schools and settings.

Consultees

15. The work programme is a live document which takes account of regulatory requirements and external deadlines. Changes and additions are reported to the forum via a regular item on the agenda of the meeting.

Appendices

Appendix A - Work programme 2018/19

Background papers

None identified

SCHOOLS FORUM WORK PROGRAMME 2018/19

Friday 19 October 2018	
Appointments	To appoint a chairman and vice-chairman for the Forum. To appoint a chairman for the Budget Working Group
Herefordshire schools budget 2019/20	To receive proposals for consultation on the 2019/20 schools budget and high needs budget 2019/20.
Local Management of Schools directed changes	<i>Deferred decision from 6 July</i> To approve a change to the local scheme for managing schools to ensure compliance with a national direction.
Review of membership of budget working group	<i>Deferred decision from 6 July</i> To review membership of the budget working group to ensure proportionality or else to agree to the group not being proportionate.
Budget Working Group	To receive a report on the activities of the Budget Working Group not covered elsewhere on the agenda. (recurring item)
Work programme 2018/19	To review the work programme and identify any additional items the forum wishes to consider.
Friday 7 December 2018	
Budget Working Group	To receive a report on the activities of the Budget Working Group not covered elsewhere on the agenda. (recurring item)
Friday 25 January 2019	
Dedicated Schools Grant settlement	To receive a report on the DSG settlement and consider proposed schools budget 2019/20 (subject to DfE national formula).
Budget Working Group	To receive a report on the activities of the Budget Working Group not covered elsewhere on the agenda. (recurring item)
Friday 15 March 2019	
High needs budget proposals 2019/20	To consider proposals for the allocation of the high needs funding block for 2019/20 (subject to DfE national formula).
Dates of Meetings	To agree dates of Schools Forum meetings for 2019/20
Work programme 2019/20	To approve the work programme for the forum for 2019/20 municipal year
Budget Working Group	To receive a report on the activities of the Budget Working Group not covered elsewhere on the agenda. (recurring item)
Friday 15 March 2019	

Summer term 2019	Date to be confirmed
National Funding Formula	To receive any updated on funding arrangements.
Annual review of membership	To review the membership of the Schools Forum to ensure proportionality.
Budget Working Group	To receive a report on the activities of the Budget Working Group not covered elsewhere on the agenda (recurring item)