Commissioning Directorate

Minutes

Schools Forum

Wednesday 18 June 2014
Civic Centre
at 5.30pm

Present:

Mr Greg Oates  Headteacher Beever School
Mrs Sue Crowson  Headteacher Horton Mill Primary School
Mr Mike Aston  Primary School Governor and Vice-Chair
Mr John Meagher  Headteacher Failsworth School
Mr Matthew Milburn  Headteacher Saddleworth School
Ms Ruth Minton  Business Manager Bluecoat School
Mr George Herbert  Governor Oldham Academy North
Mr Jo Brownridge  Academy Accountant Oldham Academy North
Councillor Brian Lord  Governor Saddleworth
Mr Graham Quinn  Headteacher Newbridge School
Mr Kevin Fennerley  Governor Kingfisher
Mrs Lynda Thompson  Headteacher PRU
Mr Iain Windeatt  Trade Union Representative
Mrs Bev Beaumont  Director of Finance and Business Development Oldham Sixth Form College
Mr Paul Cassidy  Director of Adult and Children’s Services
Mr Steve Edwards  Interim Assistant Executive Director Learning and Attainment
Mr Paul Clarke  Finance Manager Commercial Services
Mrs Wendy Lees  Senior Account Commercial Services
Mrs Liz Caygill  Finance Manager Commercial Services

Also Present:  Miss Maria Unwin  Clerk to the Forum
WELCOME AND APOLOGIES

1.1 Apologies for absence were received from Mr Dave Mycock, Mrs Julie Hollis and Councillor A Chadderton.

MINUTES AND MATTERS ARISING

2.1 The minutes of the meeting held on 15 January 2014 were approved as a true and accurate record.

2.2 Arising from item 4 (School Forum Constitution), there is now a representative for the 16-19 sector.

NEW SPECIAL SCHOOL

A briefing paper on the new special school in Oldham had been circulated prior to the meeting.

Main points referred to:

3.1 Following the SEN trends in Oldham, the Local Authority had submitted a bid for funding for a 140 space special school.

3.2 Any new school now has to become an academy or free school. New Bridge has been successful in bidding for this school, which will be built on their existing site.

3.3 The key issue is that the revenue funding will have to come from the Council’s DSG high needs block unless funding is secured from elsewhere. Further down the line, the forum will need to make some decision about funding.

3.4 By December 2014, there needs to be a business case put together to the EFA for some additional funding.

3.5 It has been identified that further revenue funding can be fund from the movement of high needs pupils from mainstream schools to the new special school, to increase in the overall number of school places and the reduction in out of borough special schools DSG budget allocation.

3.6 It is not envisaged that the school will be full immediately.

3.7 The EFA has requested that a further report on how to find / secure funding be brought back.

3.8 Question: How confident are we with the bid? Will we be picking up the tab to keep the school going?

Those involved will try their best to put forward a good business case. There has not been enough detailed research yet to say. This will be updated on at the next meeting.

3.9 Children that attend the new school are not currently catered for in
Oldham. They are attending mainstream schools with significant needs that require additional support.

3.10 **Question:** Are the pupils not attending school at all, or are they attending schools in other Local Authority areas?

Both scenarios are true. Some children are presently out of borough (10 children). There are a number of other children that are attending mainstream schools within the borough but are struggling and are at risk of not attending school completely.

3.11 It was noted that the school will be a through school, catering for children aged 4 – 19.

3.12 **Question:** How will parents be directed to move from a mainstream school to the special school?

The school will have its own identity and will be bespoke for the targeted children. Work is being carried out on the curriculum that will be followed. It is hoped that families needing this type of support will be made available of what the school is about. Last week, it was estimated that there are around 30 children identified for the first year. There will be a gradual intake each year which will eventually take the school up to the full capacity of 140.

4 **BUDGET OUTTURN REPORT 2013-14**

4.1 The 2013-14 final outturn was discussed.

4.2 There had been £213m Dedicated Schools Grant (DSG) for 2013-14, of which the breakdown was included in the report. There had been an overall underspend of £1.922m.

4.3 A breakdown was included in relation to the £1.258m Carry Forward to 2014/15 for Planned Central High Needs.

4.4 The carry forward value of £281,000 in the Central Expenditure column relates to the two year olds offer within the Early Years block. The £383,000 within the ISB column consists of unutilised growth funding (£116,000) and an underspend on the de-delegated contingencies of £267,000. These amounts will be carried forward and added to the funding for this expenditure in 2014-15.

4.5 There are some significant financial risks to the DSG, for example, the school ASD school, schools turning into academies etc. There is currently no proposal on how funding will be allocated at this stage.

4.6 A representative questioned the underspend in the de-delegated contingencies and asked whether this means schools will pay less this year. It was thought that schools will pay the same amount.

**RESOLVED:** (i) that the forum note the Dedicated Schools Grant outturn for 2013/2014; and

(ii) that the forum note the disclosure of the Dedicated Schools
SCHOOL BALANCES

5.1 The purpose of this item was to inform members of the level of actual school balances for 2013-14.

5.2 Schools can carry any surplus of deficit that is in line with the rules of percentages allowed.

5.3 A table in the report summarised school balances for 2013-14 by sector and the change from 2012-13. The table identified that school balances have reduced by £1.058m or 11.94% from 2012-13.

5.4 It was noted that, in 2013-14, five primary schools converted to academy status and therefore their figures are not included in the 2013-14 figures.

5.5 The number of schools with a surplus above the limit has gone from seven to four.

5.6 There are no schools that have had funding removed due to surpluses being too high; all schools are adhering to the rules. It was noted that there are no maintained schools in Oldham with a deficit; all have surpluses.

5.7 A member commented that schools should be using the funding in their budgets for the pupils that are attending the school at that time. There are concerns if the schools are holding that budget/funding for five years, which should have served pupils who are no longer at the school.

5.8 **Question:** Does Oldham annually publish school budgets to the forum?

They have in the past. The finance team does hold copies of the budgets and they are available and can be brought to future meetings if requested.

A member commented that it would be useful to see where the funding has been used in Oldham schools.

5.9 A member commented that academies should be asked to do this as well as maintained schools, to ensure consistency across the board.

An academy representative agreed to take this comment/suggestion to the other academies for consideration.

**ACTION:** George Herbert

5.10 **Comment:** In 2013/14, there will be five schools less in the figures due to them converting to academies. Are these schools included within the 2012-13 data? If so, could these schools be the ones that contribute to where it appears figures have improved, e.g. carrying surpluses below the limit.

It was agreed that this would be confirmed and fed back to members.

**ACTION:** Liz Caygill
POLICY EARLY RETIREMENTS OR REDUNDANCIES

6.1 The Local Authority has been seen as the compensator for early redundancies and pensions.

6.2 The balance of responsibility will now go to schools. Historic cases will continue to be honoured. Redundancies will be reviewed on a case by case basis. Premature costs should be met from the school budget share, whilst redundancy costs will only be charged to the Local Authority’s budget where there is no good reason to deduct these from the school’s budget share.

6.3 Schools are expected to put plans together to fund redundancies, however, if they are unable to do so, the Local Authority will review this case by case.

6.4 The Local Authority can give schools an indication of how much it will cost them, and it is wise that this is planned in by schools.

6.5 The de-delegated contingency will be used for maintained schools, only to support individual schools where a governing body has incurred expenditure which it would be unreasonable to expect them to meet from the school budget share.

RESOLVED: (i) that the forum note the contents of the report and approve the proposals.

SCHOOL FUNDING UPDATE

7.1 The purpose of the report was outlined to update members on the latest consultation from the Department for Education on Fairer Schools Funding 2015-16 and the analysis of Oldham’s formula allocation compared to minimum funding levels.

7.2 This year there has been some minor changes and consultation will be needed for any changes for 2015/16. The changes were lead through.

7.3 Previously, there were 37 factors considered for funding; now there are 12.

7.4 There are lots of changing to high need funding and post 16 funding.

7.5 The government is now proposing that Local Authorities are funded on a fairer level. It is proposed that this is done on a minimum funding level; this is different to the minimal funding guarantee.

7.6 The proposal is based upon a national minimum funding level based on the national average of all the local funding formula factors. The minimum funding level had been sent for the areas identified within the report.

7.7 The basic minimum entitlement per pupil is:

Primary - £2,845
Secondary - £3,951
Key Stage 4 - £4,529
The government has stressed that no school will see cuts by following this funding formula.

The formula factor sheet was circulated. Using the data the Local Authority has, Oldham Local Authority would be entitled to £176m funding. Per pupil in Oldham, this equates to £4,773 per pupil. The Local Authority is already being funded at £4,778 per pupil and will therefore not be able to access any of this funding available.

Further information from section 4 of the report was discussed.

The secondary IDACI (Income Deprivation Affecting Children Index) looks low. But locally, Oldham have made a decision to use less funding for IDACI and more funding for Free School Meal pupils. The IDACI relates to the postcodes of pupils. A decision had been made previously to focus 50% of the funding on IDACI pupils and 50% on FSM pupils. This can be reviewed again in 2015.

A member asked was there was a simple breakdown of what IDACI is. Other members guided on this. There is an IDACI scale from 1 to 6. Postcodes are put in to each category and this determines a pupil’s level of deprivation based upon their postcode. Conversation on IDACI ensued.

Members discussed the funding breakdown for FSM and IDACI. If there are areas that need to be reviewed, this can be done.

It was noted that the government is not proposing any changes.

The Local Authority had undertaken a review of its Discretionary Rate Relief Policy during 2013/14 and has approved a revised policy which applies from 1 April 2014. Under the revised policy, applicable from 1 April 2015, to those organisations in reception of Discretionary Rate Relief (DRR) during 2013/14, Voluntary Aided Schools, Academies, Trust and Foundation schools will be entitled to make a claim for 20% DRR top up, it will take into account all of the circumstances of each claim. However, the starting position of the policy is that Voluntary Aided schools, Academies, Trust and Foundation schools are unlikely to be successful in their application for DRR top up unless there are extenuating circumstances.

Schools need to apply for this now. The cost is estimated to be around £130,000 for this, which will be paid from the DDG.

A typo had been noted and would be corrected.

RESOLVED: that members note the contents of this report.

The purpose of this paper was to provide an update on the requirement for schools to complete the self-assessment process against the Schools Financial Value Standard by 31 March 2014.

This is only required from maintained schools and has to be completed on
an annual basis by 31 March 2014.

8.3 The self-assessment tool consists of 23 questions across four areas. It is straight-forward to complete.

8.4 The returns are monitored by the Local Authority and if they are not up to standard, they will be acted upon.

8.5 Out of the 79 primary schools in Oldham, 71 have been submitted on time. All special schools and secondary schools completed on time.

8.6 It was noted that the reasons for not meeting the deadline had been genuine, for example, Business Manager absence. Since this report was published, there have been further returns and there remains only five outstanding. Those schools will be contacted regarding this. When the returns are received, they will be sent to the Department for Education; the Local Authority is required to do this by 31 May 2014.

RESOLVED: that the forum note the content of the report.

9

FORWARD PLAN

9.1 The next meeting will be held on 17 September 2014 at 5.30pm.

9.2 Suggested agenda items for the next meetings were circulated.

(There being no further business, the members of the Schools Forum were thanked for their attendance and the meeting was closed at 6.22pm.)