

MEETING

SCHOOLS FORUM

DATE AND TIME

THURSDAY 12TH MAY, 2016

AT 4.00 PM

VENUE

**BEST HUB, CONFERENCE ROOM 1
LANACRE AVENUE, GRAHAME PARK, COLINDALE, LONDON NW9 5FN
([MAP & DIRECTIONS](#))**

TO: MEMBERS OF SCHOOLS FORUM (Quorum 11)

Chairman: Gilbert Knight
Vice Chairman: Anthony (Tony) Vourou

Andrew McClusky	Hasmonean High	Keith Nason	National Union of Teachers
Angela Trigg	London Academy		
Anthony Vourou	St Johns CE N11	Lesley Burgess	Northway School
Clare Rees	Sunnyfields Primary	Lesley Ludlow	Moss Hall Infants
David Byrne	Barnet & Southgate Col	Matthew Glenn	St Mary's & St John's
Elizabeth Pearson	Holly Park/ Livingstone	Maureen Kelly	St Theresa's Catholic
Gilbert Knight	Oakleigh	Michael Whitworth	Wren Academy
Jack Newton	Grasvenor Infants	Nigel Taylor	Wessex Gardens
Jane Beaumont	Copthall	Perina Holness	Moss Hall Nursery
Jeanette Adak	Monkfrith Primary	Robin Archibald	Broadfields Academy
Jo Djora	The Hyde Academy	Sally Lajalati	Colindale Primary
Joanne Kelly	Pavilion PRU	Sarah Vipond	Middlesex Uni. Nursery
Jude Stone	Cromer Road	Seamus McKenna	Finchley Catholic
		Simon Horne	Friern Barnet

Councillors

Reuben Thompstone

Officers

Chris Munday	Commissioning Director for Children and Young People
Ian Harrison	Education & Skills Director
Val White	Lead Commissioner
David Monger	SEN Consultant
Nick Adams	CSG – Financial Services
Carol Beckman	CSG – School Funding
Catherine Peters	CSG – Head of Finance
Claire Gray	School Funding
Cinzana Khan	(Clerk) CSG – School Funding

Substitute Members

Tom Brighton (for Angela Trigg)
Cllr Brian Salinger (for Elizabeth Pearson)
Marc Lewis (for Michael Whitworth)

Ian Stewart (for Andrew McClusky)
Siobhan O'Connell (for Sarah Vipond)

Observers

EFA

You are requested to attend the above meeting for which an agenda is attached.

Service contact: School Funding Team, 020 8359 7377/7378, schoolfunding@barnet.gov.uk

ORDER OF BUSINESS

Item No	Title of Report	Pages
1.	Welcome to new members	
2.	Apologies	
3.	Declarations of Interest	
4.	Minutes of Previous meeting	1 - 8
5.	Matters arising	
6.	Items for information	
a)	<p>2016/17 Schools Budget</p> <p>The Schools Budget for 2016/17 was presented to the Schools Forum on 11th February 2016 and agreed by the council on 16th February 2016. It was subsequently submitted to the Department for Education on 31st March with the Section 251 Budget return.</p> <p>The budget is subject to change during the year for many reasons, including the following:</p> <ul style="list-style-type: none">• Additional allocation for Menorah High School becoming voluntary aided (already estimated)• Adjusted early years block allocation, using data from the January census of all providers (already estimated)• Academy recoupment – this will not change the gross amount of the Dedicated Schools Grant, but will affect the amount of money going through Barnet's accounts (net budget).• In year school expansion decisions• In year EFA allocations for school 6th forms	

The next round of DSG adjustments is expected in June 2016 so further information should be available at the next meeting of the Schools Forum.

b)

Growth funding for new school places in Barnet

April 2016

This report updates the Schools Forum on:

- a) pupil place planning in Barnet and
- b) the estimated revenue funding required to fund new school places through the growth fund.

a) Pupil place planning:

Over the last five years, in excess of 7,500 new school places have been provided in Barnet through a mix of expansions and new schools.

Primary phase: In September 2015, new permanent primary provision was provided at the Wren Academy, London Academy, Watling Park, St Joseph's and Monkfrith. For September 2016, Ashmole Academy's new free school is opening, offering an additional 60 permanent reception places. At present, it is anticipated that there are sufficient places for September 2016 through offering additional bulge places at Childs Hill (15 places), St Agnes (15 places), Pardes House (20 places), Underhill (30 places) and Tudor (30 places). Feasibility studies have been commissioned to progress potential permanent expansions at St Agnes and Childs Hill to increase provision in this part of the borough over the longer term. The proposed Ark Pioneer at Underhill opening in September 2018 is seeking to provide new primary provision as part of an all through school and will help meet long term demand in the east of the borough. As part of the regeneration scheme in Colindale, there is a new three form entry school being planned at the Peel Centre but the timescale is not yet confirmed. It is anticipated that this programme of activity will meet demand through to the end of the decade although the position is being closely monitored and if necessary, further expansions will be commissioned.

Secondary phase: Although there is some spare capacity at the secondary level (concentrated in a small number of schools), there is projected to be a significant shortfall in secondary school places by the end of the decade and beyond. For September 2016, some secondary pressure has been felt in the west of the borough although all children have been placed.

We have developed a low, medium and high forecast projection of pupil places required up to the end of this decade, based on a

margin applied to allow for parental preference and pupil mobility. The figures below are based on the requirement over and above the current number of places and do not assume any new provision that is being planned (see below).

Table 1: New secondary school places (forms of entry FE) required

Academic Year	Low forecast (+3%) FE	Medium forecast (+5%) FE	High forecast (+8%) FE
2017-18	-4.9	-7.8	-12.0
2018-19	-10.9	-13.9	-18.3
2019-20	-23.0	-26.2	-31.1
2020-21	-21.5	-24.6	-29.4
2021-22	-25.2	-28.5	-33.3
2022-23	-31.3	-34.7	-39.7
2023-24	-32.2	-35.6	-40.7
2024-25	-24.5	-27.7	-32.6

** margin applied to allow for parental preference and pupil mobility. The projections do not assume any new provision being planned, described below*

Meeting the projected secondary demand: Additional places can be provided through either:

- a) Expansion of existing schools.
- b) New local authority commissioned schools, funded by the local authority.
- c) New Free Schools approved and funded by central government.

The intention to meet the need in Barnet is to use a combination of a) and c). We are not proposing to build any new local authority commissioned and funded secondary schools ourselves as we anticipate that the Free School programme approved and funded through central government, will deliver a number of new secondary schools in the Borough.

Expansions: Having already expanded three existing secondary schools (all Academies providing non-denominational places), there are two further secondary expansion projects that are in progress that will provide additional Church of England and Catholic places.

- a) St Mary's and St John's (SMSJ) Church of England: The new SMSJ offer is proving very popular with parents. The school is currently offering 4 forms of secondary entry each year and we are now commissioning 2 additional forms of secondary entry, starting in September 2016. It will then offer 6FE each year.

- b) St James Catholic High: An expansion of St James Catholic High is being commissioned along with the re-location of Blessed Dominic primary school onto the secondary school site. St James will then offer 8FE each year.

Hasmonean has recently consulted the public on plans to re-locate and expand by 2 FE. Several other secondary schools have also approached the council wanting to expand provision (or to sponsor a new free school). One of the drivers for schools looking now to expand is the financial pressures in school revenue budgets. However, due to the high number of free school applications submitted, we are waiting to see the outcome of the free school applications before committing any more of the council's capital monies in expansions.

New Free schools: Free school applications are made directly to the DfE and applications are decided by the Regional Schools Commissioner

The Ark Academy Trust has already been approved to open a new all-through school in Barnet – to be known as Ark Pioneer. The school will provide 6 forms of entry at secondary and 3 forms of entry at primary (as well as nursery and sixth form provision). The Ark Pioneer school will open in September 2018.

The DfE has advised the council that they have received six free school applications for Barnet in the last bidding round. Four relate to secondary school places (including an all-through school), one relates to a new SEN special school and the sixth related to an application by an existing Academy to open a sixth form.

As the approval of free school applications is not in our hands it is difficult to have certainty over the future programme. However, assuming that at least two of the free school proposals are approved, the following could be considered to be a realistic programme of activity (subject to securing land). The expansion of SMSJ is now underway and the Ark Pioneer is preparing to submit its planning application. It is likely that 'bulge' classes at secondary level will be required as the programme is delivered – for example, East Barnet is offering an additional form of entry for September 2016 and September 2017, ahead of the opening of the Ark. Of course, the DfE may approve all four applications for new secondary free schools and then the number of forms of entry provided would rise to 34FE.

Table 2: Potential secondary programme to meet projected long term demand

		Number of additional permanent forms of secondary entry	Potential date for first intake of (additional) pupils
Expansion	SMSJ	2FE to become 6FE school	September 2016
Expansion	St James	2FE to become 8FE school	September 2018
New school	Ark	6FE	September 2018
New school*	TBC	6FE	September 2018
New school*	TBC	6FE	September 2020
Total		22 FE	

* Subject to DfE Free School approval process

b) Growth funding for new and expanding mainstream schools (Reception to Year 11)

All mainstream schools receive formula funding for Reception to Year 11 classes based on the number of pupils recorded on the autumn census the year before.

New and expanding schools receive additional funding to cover the costs of extra classes on roll, for the first seven months (or 12 months at an academy), before the higher pupil numbers show on the autumn census.

Only schools expanding with the agreement of the local authority or DfE receive this extra funding from the growth fund. No in-year adjustments are made for increasing or decreasing rolls.

All funding for growth comes from the growth fund within the Dedicated Schools Grant with the exception of new free schools in the first year of opening.

For non-mainstream school provision, the arrangements are different in each case. Schools are funded for nursery children (2, 3 and 4 year olds) on a termly basis based on actual attendance. Special schools and alternative provision are place funded at £10K per place agreed with the local authority, plus top-ups which follow the child. Post 16 students are funded by a national formula with funded numbers each year agreed directly with the EFA.

Types of growth funding: Depending on their circumstances, mainstream schools receive different types of growth funding from the Dedicated Schools Grant:

Table 4: Types of funding available through Barnet’s growth fund

Type	Details	Primary	Secondary
Bulge classes	One off additional class to meet demand for places	Maintained schools: £48,000 (for 7 months) plus £10,000 non-capital start-up grant. Academies also receive £34,286 in the following year.	Maintained schools: £61,000 (for 7 months) plus £10,000 non-capital start-up grant. Academies also receive £43,571 in the following year.
Permanent expansions in existing schools	Additional classes in existing year groups (eg expansion from 2 to 3 forms of entry)	Maintained schools: £48,000 (for 7 months). Academies also receive £34,286 in the following year but this is refunded to Barnet by the EFA.	Maintained schools: £61,000 (for 7 months). Academies also receive £43,571 in the following year but this is refunded to Barnet by the EFA.

New year groups		Estimated additional pupils added to census numbers used in funding formula.	
Diseconomies of scale – lump sums (excludes free schools opened by the EFA not meeting basic need)	New schools filling from the bottom or existing schools opening a new phase to become all-through	New primary phase: £5375 per empty year group; new school £10,750 per empty year group.	New secondary phase: £13,500 per empty year group; new school £27,000 per empty year group.
New phases / schools (excludes free schools opened by the EFA not meeting basic need)		£50,000 for new primary phase in year before opening. (£100,000 for a new school)	£90,000 for new primary phase in year before opening. (£180,000 for a new school)

The table below shows the distribution of growth funding in 2015/16 and the planned growth funding for 2016/17

Table 5: Growth funding in the Dedicated Schools Grant 2015/16 and 2016/17

	2015/16 actuals	2016/17 planned		
Funding	Number	Cost	Number	Cost
Primary bulge classes (30 pupils per class)	8	464,000	2	116,000
Primary half class expansions (15 pupils)	-	-	2	76,000
Primary permanent expansions (30 pupils per class)	11	528,000	10	480,000
Secondary permanent expansions (30 pupils per class)	1	61,000	2	122,000
New class protection (for new classes that do not fill enough to be viable)	5	89,526	6	289,340
Diseconomies of scale	4	216,250	4	246,750
Start-up for new primary phase	2	100,000	-	-
Growth fund total cost		1,458,776		1,330,090
New primary year groups	6 schools, 236 places	696,868	7 schools, 326 places	1,006,561
New secondary year groups	3 schools, 370 places	1,165,876	3 schools, 420 places	1,343,965
Total cost of new year groups in funding formula		1,862,744		2,350,526
TOTAL GROWTH, excluding casual admissions		£3,321,520		£3,680,616

For future years, estimates of growth funding will depend on the actual demand for secondary places as well as the dates new schools open. In particular, the opening of new free schools is usually dependent on land acquisition and planning consent.

Given the projections above, the following estimates may be conservative and the profile of spend is likely to change. The figures will be kept under review as the outcome of the DfE's free school programme become known.

Table 6: Estimated projected level of growth funding required in future years

	17/18	18/19	19/20	20/21
Lump Sums from growth fund	783,750	1,031,750	1,650,500	1,116,375
Formula funding	3,018,750	2,023,117	2,039,100	1,977,850
	3,802,500	3,054,867	3,689,600	3,094,225

Action:

To note the growth expenditure for 2015/16, the planned spend in 2016/17 and the estimated projected spend 2017/18 to 2020/21.

7. Items for discussion

a) National Funding Formula consultation

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DfE consultation on a National Funding Formula for schools

The Department for Education (DfE) launched two consultations on 7th March 2016, one on a Schools National Funding Formula and the other on High Needs Funding (SEN). Both consultations will be in two stages, the first stage invited submissions by 17th April and the second at a date to be announced later in 2016.

The department also plans to consult on Early Years Funding later in 2016.

This first stage of the consultation only covers the principles, methodology, and the framework of a national funding formula. Crucially, the detail that will allow us to calculate the impact on the local authority and individual schools in Barnet will not be released until the second stage of the consultation.

A national funding formula for schools

The government proposes to introduce a national funding formula for schools that ensures a consistent and fair approach to funding schools across the country based on needs rather than historic patterns of expenditure. It is consulting on the factors that should

be included in the formula and the approach to introducing it.

The DfE plans to have a 'hard' national funding formula in place for all mainstream primary and secondary schools and academies from April 2019, with the aim of distributing funding fairly and consistently across the country. It uses the term 'hard funding formula' to distinguish between what will happen in 2019 and what will happen in the two previous financial years.

From 2019/20 the national formula will determine the funding for each school and schools will be funded directly by central government. In 2017/18 and 2018/19 the Schools Block paid to local authorities will be determined by aggregating the amounts that individual primary and secondary schools would get under the national formula. However, in order to allow some local management of the phasing in of the new national formula, local authorities, advised by their Schools Forum, will be able to use a local formula to determine how much each school will actually receive. In other words it will be a hybrid model, referred to as a 'soft' national funding formula.

The government plans to base the national formula on various factors that will be common across the country and has been consulting on those factors. The only adjustments for the location of any school will be an area cost adjustment to take account of higher costs in some areas, particularly London, and the sparsity factor which helps isolated rural schools.

Funding blocks

During this period, between April 2017 and March 2019 the Schools Block of the Dedicated Schools Grant (DSG) funding must be passed in its entirety to schools.

There will also be a new, formula-based Central Schools Block to support central local authority services. This will cover some of the duties previously funded through the Education Services Grant (ESG). The ESG contributes towards the funding of some central functions that are not funded through the DSG (Dedicated Schools Grant) such as school improvement for maintained schools, education welfare statutory work and asset management.

The department proposes to provide specific funding for Pupil Number Growth but the consultation document proposed that this should be funded on historical expenditure, which many local authorities may find difficult, especially at this time when the expansion of secondary schools is about to begin. Our concerns over this have been expressed in our response to the consultation.

The Pupil Premium, Universal Infant Free Meals, Devolved Formula Capital and other grants will continue.

The government also proposes to reform High Needs funding so that it is distributed more fairly through a formula that is based on factors relating to need rather than on historic patterns of expenditure and provision. To that end it proposes, and has consulted on, the factors that should be taken into account in determining the formula.

At the same time it recognises the need to phase in any changes in order to avoid disrupting provision and to give local authorities time to plan, and make the necessary adjustments to, their SEN arrangements and provision. Local authorities will continue to have responsibility for identifying, placing, and providing funding (including top-up funding) for, children with Education, Health and Care Plans.

Key issues in relation to the proposed National Funding Formula

The key issues for Barnet are:

- **School improvement** – The DfE is proposing to remove the LA role in school improvement after 2016/17. Barnet is one of the best performing LAs in the country in relation to the proportion of maintained schools that are good or outstanding (94%) but this involves a mixture of strategies. Increasingly it is a school-led system and the school improvement partnerships established across Barnet put Barnet schools in a strong position to respond to the proposed new agenda. However, the key question that the new approach must address is how to ensure a robust programme of monitoring and challenge, as well as support, for all schools, and appropriate intervention for the small number of Barnet schools that are a school causing concern. This is a particular concern in the five-year period between 2017, when it is proposed to remove the local authority role, and 2022, the date by which all primary and secondary schools must be academies, with the vast majority expected to be in Multi-Academy Trusts, where 'most school improvement will take place'.
- **The area cost adjustment** and whether that will be enough to cover the actual extra cost of living and working in London, taking account of both London weighting and how average school salaries tend to be higher in London, which they have to be due to housing costs etc.
- **The speed of introduction of any changes** – the DfE is sensibly proposing to phase in the new arrangements – with a gradual move to the national formula and a gradual move away from local formulae paid through LAs over 2 years. But whether the changes can be achieved without major disruption will depend on the scale of change for individual schools and LAs over those 2 years and on the actual phasing within those 2 years and the level at which they set the Minimum Funding Guarantee (MFG - currently set at -1.5%, meaning per pupil funding for any school cannot fall by more than 1.5% a year).
- **The creation of a new central block and the requirement to passport the schools block in full.** This may be achievable without detriment to key services if the central services are funded by top-slicing the school block first and the current High Needs block is protected – but otherwise it could mean big cuts to central services or SEN. It is not yet clear how the central block will be determined. However it is, it could mean

significant reductions to budgets for some central services. This must be a significant budget risk for Barnet – especially in relation to some of the historic protected budgets for Family Services (e.g. funding for support to troubled families) and the historic DSG contributions to SEN transport (£400k) and the EP service (£120k).

- **Growth Funds** –The documents say that growth funds will be based on historic spend in 2016/17 and 17/18, which probably helps Barnet because we have a high level of spend but we need to be sure it will cover actual growth costs as the pupil bulge feeds through to secondary.
- **High Needs funding** – There is not yet enough information on what the formula will look like to enable us to comment on the implications for Barnet. The proposed phasing of changes is certainly welcome.

Barnet's response to the consultation

Schools and local authorities were invited to respond to the consultation. Attached as an appendix to this report is the council's response to the DfE's consultation on both the schools' national funding formula and the High Needs national funding formula.

We will advise schools when the next stage of consultation begins on the government's proposals and the impact on Barnet and our proposed response. We will provide an update to chairs and vice-chairs of Governing Bodies at our next meeting on 25 May.

Early Years

The department has said it will consult later in the year on a new national funding formula for Early Years. In the meantime it has recently issued a consultation document, entitled 'Childcare free entitlement: delivery model' which can be seen at:

https://consult.education.gov.uk/early-years-funding/childcare-free-entitlement/supporting_documents/CONDOC.%20final%20version%2031st.pdf

This consults on the arrangements for the provision of 'free entitlement' childcare, including the planned extension of free entitlement for 3 and 4 year olds from 15 to 30 hours a week for working parents. The consultation is not about funding, though the document does highlight an increase in the 'national average funding rate to providers' for 3 and 4 year olds (rising from £4.56 to £4.88 by 2019/20. This rate is the average amount paid to local authorities, not providers, and varies depending on the location of the LA. Barnet's actual rate is higher.

Responses to this consultation have been invited by 6 June. The early years team has circulated it to all Private, Voluntary and Independent providers and we will alert schools to it in the Schools Circular. The early years team has invited providers to share their responses with the team, who will then also develop a local authority response. We will bring a report on Early Years funding to the Schools Forum when the DfE issues its consultation on the proposed Early Years National Funding Formula.

	<p>Ian Harrison, Education and Skills Director, Barnet with Cambridge Education, North London Business Park, Oakleigh Road South, London N11 1NP Tel: 020 8359 7943 Email: ian.j.harrison@barnet.gov.uk</p>	
8.	<p>Draft agenda for next meeting - 7th July 2016</p> <ol style="list-style-type: none"> 1. Welcome to new members 2. Apologies for absences 3. Declarations of interest 4. Minutes of the last meeting 5. Items for information <ul style="list-style-type: none"> • 2015/16 Budget Monitoring – Final Outturn • 2016/17 Budget 6. Items for decision/ discussion <ul style="list-style-type: none"> • National Funding Formula consultation 7. Draft agenda for next meeting – 29th September 2016 8. Any other business 	
9.	Any other business	

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