



ANNUAL REPORT 2012/2013

1.0	<u>Purpose of Report</u>	
1.1	The purpose of the report is to provide an annual report of the work of the Forum covering the period 12 th June, 2012 to 26 th March, 2013.	
2.0	<u>Schools Funding Formula</u>	
2.1	Consultation took place on the Schools Funding Formula which saw a reduction in the number of factors that could be considered for distribution under the Dedicated Schools Grant. School budgets would be based on the October school census, therefore, children eligible for free school meals would need to be registered by September. A Funding Formula Group was set up to consider models and re-modelling until an appropriate formula, in line with DfE guidelines, could be consulted on by schools.	12.6.12
2.2	<u>Schools Funding Formula</u> A Funding Formula Group was set up to develop the principles of a new funding formula and approved consultation with all schools on the proposed new funding formula.	10.7.12
2.3	<u>Schools Funding Formula - SEN</u> The decisions by Government impacting on SEN introduced changes to the High Needs Block of Dedicated Schools Grant which would provide funding for pupils and students from birth to 25 years. High Needs pupils and students would be funded by a "place plus" approach. The three elements of funding would include "core education funding", the mainstream unit of per-pupil or per-student education for pre and post 16 provision. "Additional support funding" was a clearly identified budget for providers to enable additional support funding to be provided to support high needs pupils or students with additional needs up to an agreed level. Element three would provide "top up funding" above elements 1 and 2 to meet the total cost of the education provision required by an individual high needs pupil or student based on their assessed needs.	12.6.12

2.4	<u>Schools Funding Formula - Early Years</u> Free early education for three and four year olds would continue and the Local Authority could be responsible for those attending academies. Local Authorities will be required to publish a pro-forma on how their Early Years Single Funding Formula (EYSFF) was set out. An Early Years Funding Group would be organised to look at the current formula in the light of the recent consultation.	12.6.12
3.0	<u>Schools Forum Membership</u> 3.1 In view of the proposed changes to the funding formula, the membership and voting rights of Schools Forum were reviewed in line with the Department for Education requirements 2012. 3.2 <u>Walsall Schools Forum Constitution</u> A review of the Constitution took place to bring it in line with the changes of membership necessary following the changes in category of various schools.	12.6.12 10.7.12
4.0	<u>Schools Forum Consultation - The Local Offer</u> 4.1 Following previous consultation on the Department for Education "Support and Aspiration: A new approach to special educational needs and disability Progress and Next Steps", primary, secondary and special schools fora were requested to identify representatives to develop a draft local offer for wider consultation.	25.9.12
5.0	<u>Proposed process for decisions on de-delegation of funding</u> 5.1 Schools Forum nominated representatives from the maintained primary and secondary sectors to lead on the consultation process for voting on the de-delegation of funding.	25.9.12
6.0	<u>Arrangements for the funding of Early Years provision 2013/14</u> 6.1 Schools Forum noted the report in respect of free early education for 2 year olds. 6.2 Schools Forum agreed, with regard to the operation of the Early Years single funding formula, that a single hourly rate would apply to all private, voluntary and independent settings. From April, 2013,	25.9.12

	low cost SEN funding would be incorporated into the hourly funding applicable for the setting.	
7.0	<u>Schools Funding Consultation Responses</u>	
7.1	Schools Forum endorsed the principles of giving each school indicative impacts of the new funding formula and noted that primary, secondary and special heads groups were supporting the principles that had been proposed through the consultation.	25.9.12
7.2	<u>Final Schools Funding Formula</u> The final Schools Funding Formula was commended to Cabinet and a permanent Funding Formula Working Group was established to enable meetings to be called at short notice.	9.10.12
8.0	<u>Dedicated Schools Grant</u>	
8.1	Schools Forum noted that Grant Thornton had made no adverse statements regarding the 2011/12 DSG expenditure.	9.10.12
9.0	<u>Maintained Primary Schools De-Delegation</u>	
9.1	The maintained primary school Members of Schools Forum approved de-delegation of:- Free school meal eligibility service; Insurance service; Licences/subscriptions; Staff costs - maternity supply cover; Staff costs - Union and public duties; Behaviour support services; Library and museum services.	6.11.12
9.2	<u>Maintained secondary schools to make decisions on whether to retain centrally funded services (De-Delegation)</u> The maintained secondary school Members of Schools Forum approved de-delegation of:- Free school meal eligibility service (£20.10 per free school meal pupil); Licences/subscriptions (£2.63 per pupil); Staff costs - Union and public duties (£13.59 per pupil);	4.12.12

	<p>Behaviour support services (£63.08 per pupil) to be reviewed on an annual basis.</p> <p>The Forum Members eligible to vote on this matter agreed that the following would not be de-delegated:-</p> <p>Insurance, noting that a traded service would be available at the value of the delegation; Staff costs - maternity supply cover, funding to be retained by maintained secondary schools.</p> <p>It was noted that library and museum services for secondary schools had previously been de-delegated, therefore, no de-delegation decision was required.</p>	
9.3	<p><u>Music Service</u></p> <p>Schools Forum noted that it was possible to de-delegate the music service.</p>	6.11.12
9.4	<p><u>De-delegation of Music Service Funding</u></p> <p>As the Music Service in Walsall was unique it could be funded by top slicing school budgets rather than de-delegation. This would be a continuation of the arrangements for 2012/13. All Members of the Forum were eligible to vote on this issue and approval was given for a one year agreement to enable top slicing from the budget of all schools benefiting from the service.</p>	4.12.12
10.0	<p><u>Enlargement of Phoenix Primary ESD Special School</u></p>	
10.1	<p>The Forum noted proposals to re-structure the provision for primary aged children needing additional support to emotional, social and behavioural development which had led to the need to enlarge Phoenix Primary ESD Special School by 6 planned places. The places would be primary places and subject to a statutory assessment of special educational needs and statement prior to placement.</p>	4.12.12
11.0	<p><u>High Needs Funding Formula Update</u></p>	
11.1	<p>Schools Forum noted the proposed definition of Notional SEN budget as funding identified for a school to receive to enable it to provide SEN support. The Forum noted exceptional circumstances to support pupils with high needs and the progress of High Needs</p>	4.12.12

	funding.	
12.0	<u>Scheme for financing schools - premature retirement</u>	
12.1	Schools Forum noted that the change to the scheme for financing schools in respect of premature retirement would be discussed with teacher Unions and would form part of the consultation on a revised scheme for financing schools. It was also agreed that a Working Group be set up consisting of primary and secondary head teachers and the Union representative on the Forum.	4.12.12
12.2	<u>Premature Retirements</u> The Working Group set up to look into premature retirement costs met on three occasions to review various issues and options. In view of the concerns of Members, the Forum agreed to use some of its underspend on administration to enable external legal advice to be sought in respect of the definition of early and premature retirement as included in Annex 7 of the report. Notwithstanding this, Schools Forum noted that the premature retirement section of the scheme had been updated in line with the Department for Education default position.	12.2.13
12.3	<u>Teachers redundancies and premature retirement and scheme for financing schools</u> Schools Forum approved the revised Scheme for Financing Schools. The Forum agreed to discussions being held with two representatives of the Forum, Council officers and appropriate Trade Unions on increasing the premature retirement age for teachers from 55 to 58 years of age. The outcome of discussions to be submitted to Appointments Board for decision.	26.3.13
13.0	<u>Schools Funding Formula</u>	
13.1	Schools Forum noted that the Department for Education had received Walsall's School Funding Formula and believed that it complied with all Regulations. The Forum noted that the formula complied with all principles endorsed by schools throughout consultation. The concept that the cash value of minimum funding guarantee and the cap should be the same. The use of central expenditure limit surplus to support the schools block funding for 2013/14 was endorsed.	12.2.13

14.0	<u>Notional SEN funding - final definition for 2013/14</u>	
14.1	From April, 2013, Notional SEN for Walsall schools would consist of a proportion of funding taken from the age-weighted pupil unit (AWPU), the deprivation factor, the lump sum and the whole of the low-cost, high incidence SEN factor. In exceptional circumstances, core education funding, additional support funding and top up funding would support pupils with high needs. Schools Forum noted and endorsed the proposals for circulation to all schools.	12.2.13
15.0	<u>Walsall Scheme for Financing Schools 2013/14</u>	
15.1	Schools Forum recommended the draft Scheme for Financing Schools 2013/14 for consultation with all schools. The Forum endorsed potential further consultation on any required or potential revisions to the draft Scheme with particular reference to any updated advice from the Department for Education or around the Balance Control Mechanism.	12.2.13
16.0	<u>Balance Control Mechanism</u>	
16.1	Proposed changes to take out the Balance Control Mechanism were referred to the Primary and Secondary Heads fora for discussion.	12.2.13
16.2	<u>Balance Control Mechanism</u> Following the feedback from primary and secondary fora, the Forum has agreed an 8% threshold for the Balance Control Mechanism to apply to 12/13 year end balances onwards.	26.3.13
17.0	<u>Approval of Central School Budget Expenditure</u>	
17.1	Following the reforms to the school funding system, Schools Forum approved the level of central school expenditure, the level of central expenditure - early years and the criteria for allocating growth funding in 2013-14.	12.3.13

18.0	<u>High Needs - Top up rates 2013-14</u>	
18.1	Schools Forum had considered the proposed top up rates for 2013/14 to be used to fund the assessed needs of high needs pupils in maintained schools and academies. The Forum endorsed the proposed top up rates for mainstream schools and academies to be paid in real time. The Forum also endorsed the top up rates for special schools which included additional funding to meet assessed need. The basis of real time funding transfer was approved.	12.3.13
19.0	<u>High Needs - commissioned places and top-up rates for Additionally Resourced Provision/Units and Alternative Provision - PRUs</u>	
19.1	The number and type of commissioned high needs places by the Local Authority were noted. The Forum endorsed the proposed top-up rates for Additionally Resourced Provision/Units in mainstream schools, academies and special schools.	26.3.13
19.2	The Forum also noted that there would be a review of the funding basis of all high need place provision during 2013/14; the current progress towards delegated budgets for Alternative Provision in respect of Pupil Referral Units; the circumstances under which the Local Authority, schools and academies, as commissioners would make payments of top-up funding for provision made at Phoenix and PRUs.	