

MEETING:

DATE: MeetingDate

TIME: MeetingTime

VENUE: MeetingLocation

Member

Substitute

Councillor

Councillor

MembersExpectedShortCllrRolesR AllNotRequiredShortCllrRows
ows

COMMITTEE OFFICER: MeetingContact
MeetingContact_2
Telephone: CommitteeTel
Fax: CommitteeFax
E-mail: CommitteeEmail

If you have any special needs that may require arrangements to facilitate your attendance at this meeting, please contact the Committee Officer named above, who will endeavour to assist.

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AGENDA

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Sefton Council

Sefton Schools Forum Minutes

Minutes of Sefton Schools' Forum Meeting Monday 12th March 2018 1.30pm PDC, Formby

Forum Members present:- Isobel MacDonald-Davies (**Chair**), Ian Raikes, Toni Oxtan Grant (on behalf of Sue Clare), Malcolm Parry, Cathy Earley, Matt Symes, Sharon Cowey, Niki Craddock, Jon Horrocks, David Jones, Danny Macareavy, Nicola Walsh, Sandra McKay, John Baden, Jacqueline Kerr, Michael Mainwaring, Debbie Rayfield and Brenda Hayes

In attendance:

Colette Jones - Clerk to Sefton Schools Forum (CJ)
Mike McSorley - Head of Schools and Families (MM)
Kevin McBlain - Corporate Finance CS Finance (KM)

Actions

1 Apologies

Dorothy Lee-Ogden, Brenda Porter, Paul Tomlinson, Cllr Richard Hands, David Jones, Anna James, Peter Hennessy Simon Penney, Sue Kerwin, Mary Johnson, Jon Horrocks, Sue Clare

2 Minutes of the last meeting

Minutes from the last meeting were agreed

3 Matters arising from Minutes

(7) Kevin McBlain provided a written response to the information Cathy Early requested

(4) DSG allocations-funding models are being prepared and will be presented to representatives from SASH/SAPH and Governors by finance in May. Ian Raikes, Matt Symes and Isobel MacDonald Davies volunteered to attend the meeting.

4 High Needs budget monitoring forecast as at January 2018

High Needs Budget overspend has increased to £2.2m, including additional spend for out of borough of £428k and the increase in Comp Education fees. It is expected that there will be a similar overspend on the HN budget in 18/19. Sefton is not the only LA struggling with demands on the HN budget and Wigan £1.6m, Warrington £1.9m and Lancashire £8.5m all reporting overspends due to increasing budget pressures, limited places, expensive day places at a cost of £40k per child pa and the increase in pupil numbers. Sefton has used DSG and Early Years reserves to balance the budget this year. Some LA s are considering proposals to reduce budget deficits by;

- Reducing dependence on Non Maintained and Independent school places and raising in-house provision
- Reducing Top ups to Special schools from a range of between 5% and 20%
- Removing spare places from Special Units and Resourced Provision
- Review Special School budgets and resourced place banding mechanism
- Funding Top ups on a pro-rata basis for provision that is not full time (i.e less than 25 hours per week)
- Reduce High Needs Central commissioned budgets.
- Reducing outreach provision

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- Central savings where possible
- Exhausting reserves
- Requiring schools to fund up to 1% of their funding to High Needs with permission of the DfE through a disapplication
- Contribution from the Council matching the schools block funding to High Needs (Sefton has no resource to support something like this)
- Reducing the bandings on new EHCP s by 20%
- Stop all short term placements in Pupil Referral Units intended to reduce permanent exclusions (Sefton PRUs currently charge schools a daily rate or pre exclusions)
- Closure of a Special School and reductions in Sensory services.

All proposals will need to be discussed and decided on at a strategic level. If running a deficit year on year, the first call on funding is to meet that deficit. KMc stated that action to address the deficit is required urgently else the situation may ratchet up sharply beyond 2018/19 if not addressed. There are no more balances to bail out an overspending situation in next year and it was suggested that a number of savings options be considered and discussed at either a High Needs sub group or as part of the strategic group undertaking the High Needs review. Whatever the decision, urgent action is necessary to start addressing the situation. Some actions may need to be agreed before the High Needs review is completed.

5 Charging Schools for Complimentary Education services

There has been a significant increase by schools using the complimentary education service. This paper informed schools that from 1 April 2018 a charge will be imposed on schools for each pupil referred to complimentary education. The additional funding will pay for the extra teaching provision and transport costs for the vulnerable pupils incurred as a result of the growing numbers.

The charge will be reviewed in 6 to 9 months. A letter will be sent to all schools informing them of the charge.

Kevin McBlain to send letter to schools

6 Funding for capacity to develop an ambitious and improved nursery school model

Early Years Sub Group has made a request to Forum to use £40k of Early Years DSG reserves to assist maintained nurseries to develop an ambitious and improved model of service provision and to create a federation of nurseries. The headteachers of the Maintained Nursery schools have sought approval from Dwayne Johnson, DCS, to progress a business case for change, which will align the schools with the Council's new locality model of service for early help/intervention. The funding will be used to backfill the headteachers posts whilst the model is being developed and any remaining money will be returned to the budget. One of the nurseries has applied to become a teaching school.

Forum approved the request for £40k fund for nursery model

7 SEN Review

SEND Team have received a small amount of funding to conduct a review of the service over a four month period. The review is to understand demand and provision to develop a balanced model, increase parental confidence and support schools to provide better outcomes for SEND children and young people. Although it is cheaper to provide funding for SEND in mainstream schools it has to meet the needs of the children and even the most expensive provision may not be the most appropriate or result in better outcomes. A small group of volunteers will conduct the review and Jacqui Kerr will circulate the list of volunteers. The result of the review with any system changes or

Minutes of any review meetings to be sent to Schools Forum for comment

Agenda Item 2

efficiencies savings will be reported back to Schools forum and the High Needs Sub Group (this will be re-established) before implementation. Over the summer term the High Needs Panel will only be focussing on transitions eg new schools entrants, Y6 to Y7 and new families moving to the area.

8 **Income from unauthorised fines**

The income generated from unauthorised fines equates to £58K and the staff costs, including legal costs equate to £96k which is non profitable and labour intensive for both schools and the LA officers. Issue raised over the process as it has not stopped parents taking children out of school as the levy is less than the savings made on holidays out of school time. Some of the Primary schools had requested detailed report of the costs of running the unauthorised fine process.

MM to send note to schools

9 **Apprenticeship levy**

Michael Mainwaring and Debbie Rayfield informed Forum of the apprenticeship levy and how schools can access funding for training for staff development or to employ an apprentice. Sefton have funding for 136 apprentices and have recruited 66 with 10 more joining in March. The period before funding is taken back by HMRC is 24 months, with any unused funds going back to the HMRC and being recirculated towards SME business. Training is available for apprentices and existing Sefton staff and includes courses such as AAT, an accountancy qualification for schools bursars, business admin and childcare. If schools require further information please contact Emma Finnegan, emma.finnegan@sefton.gov.uk or Debbie Rayfield, debbie.rayfield@sefton.gov.uk

10 **AOB**

SASH/SAPH have agreed to send letters to parents and MP's concerning schools budgets and the impact cuts will have on schools. The letter requires generic figures for Sefton schools from finance

Kevin McBlain to check for any useful financial information in support to SASH/SAPH

Date of Next Meeting

Monday 11th June 2018, 1.30pm-3.30pm, PDC, Formby

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Salix Funding

Anne-Marie Clegg & Steph Jukes



Eco Savers

- Specially designed support programme
- Free to **ALL** schools in Sefton on the Energy Contract (Inc. Academies/Free Schools)
- Site Energy Audit & Report
- Signposted support
- Training/education/supporting materials
- Website information available



Salix Finance - Overview

Salix Finance

- 100% interest free loan – repaid through direct debit
- Funded by Department for Education
- Criteria
- Sefton must sign off the loan
- Process – Apply to Sefton Council

Academy & Community, VA, VC and Foundation Special Schools

- Special Salix Finance streams
- 100% interest free loan – repaid through energy bill.
- Academy do not require Sefton Council sign off
- Accepted that Special schools may have higher energy demand



Salix Finance - Overview

- £50 million allocated to over 1,250 schools in England;
- Common works and Paybacks:
 - Lighting 1-3 years
 - Cavity Wall Insulation 3-5 years
 - Loft insulation 3-5 years
 - Boiler Controls 3-7 years
 - Boiler Replacement 7 years upwards

- Ave Sefton School Spend per year:

	Primary	Secondary	Special
Electricity	£14,000	£55,400	£20,800
Gas	£6,800	£22,500	£15,000



Sefton Proposal

- Payback period of 1-5 years;
- Payments by Direct Debit;
- Academisation - loan transferred;
- Expressions of interest welcome.

Any Questions?

Anne-Marie Clegg – Environmental Education Officer
Steph Jukes – Sustainability Officer

Anne-Marie.Clegg@sefton.gov.uk

Stephanie.Jukes@sefton.gov.uk

0151 934 4743 & 0151 934 4552

- <https://www.salixfinance.co.uk/loans/maintained-schools-and-sixth-form-colleges>
- Academies:
<https://www.salixfinance.co.uk/loans/SEEF>

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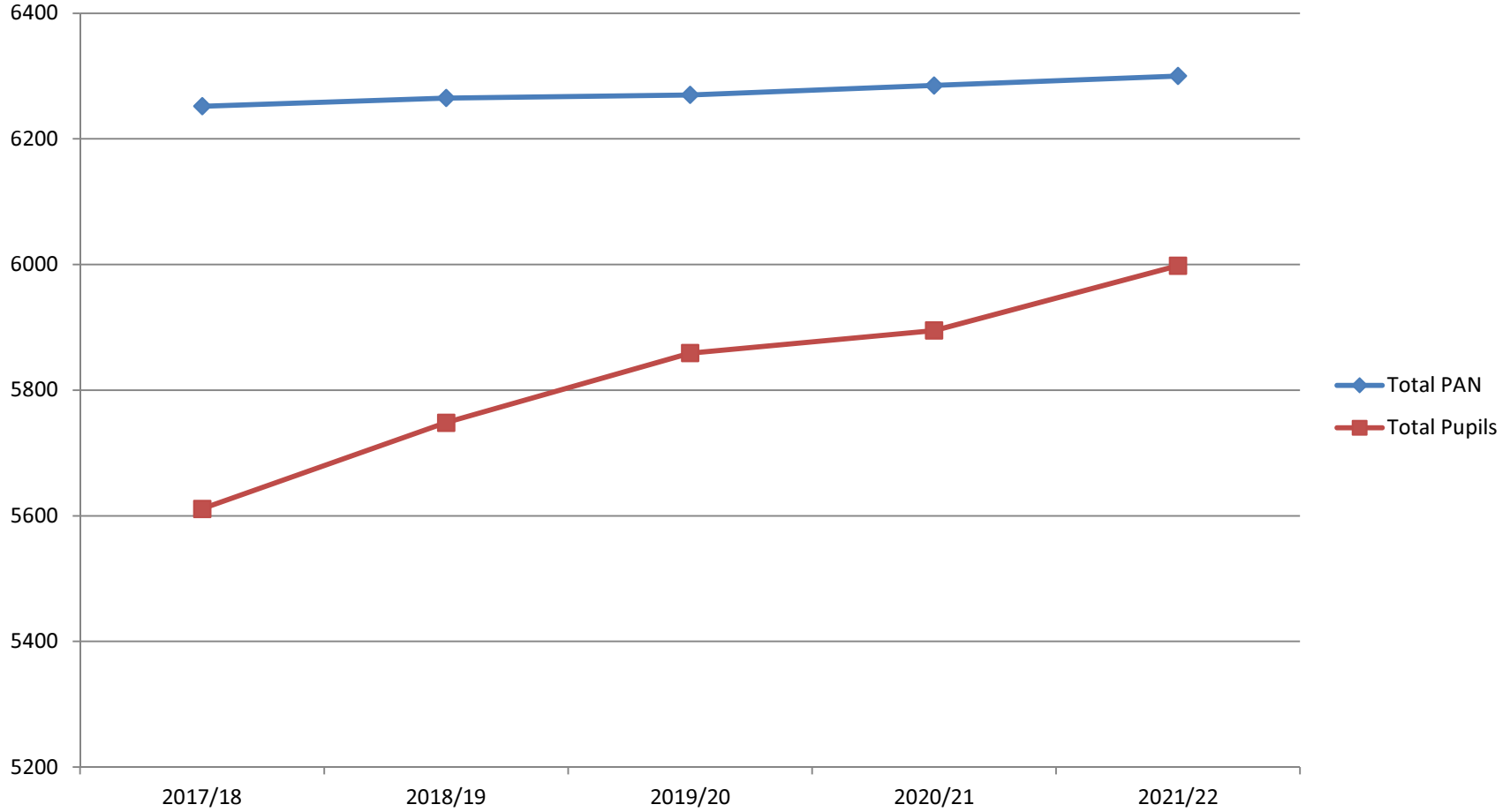
Pupil Numbers 2017-21

June 2018

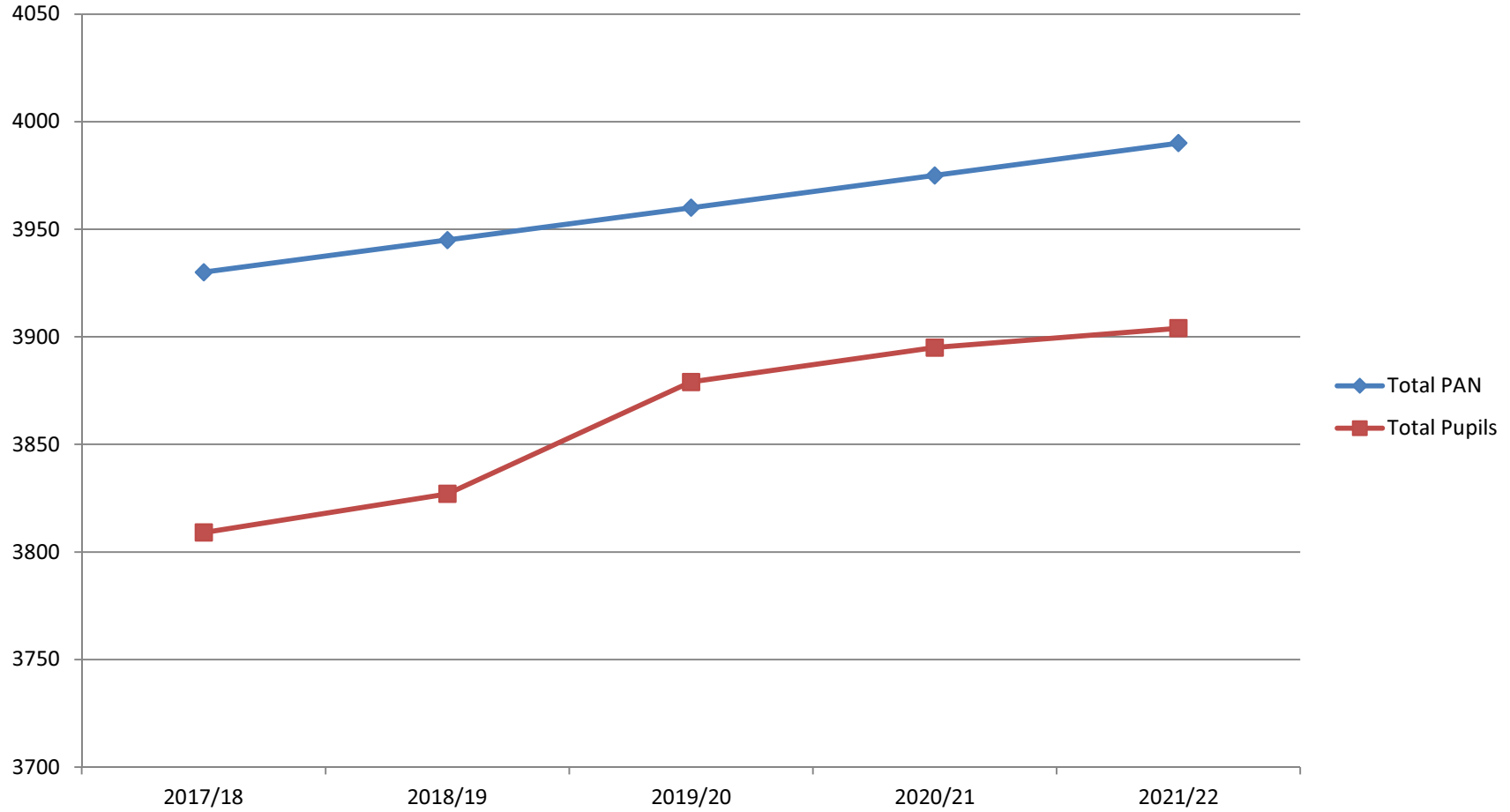
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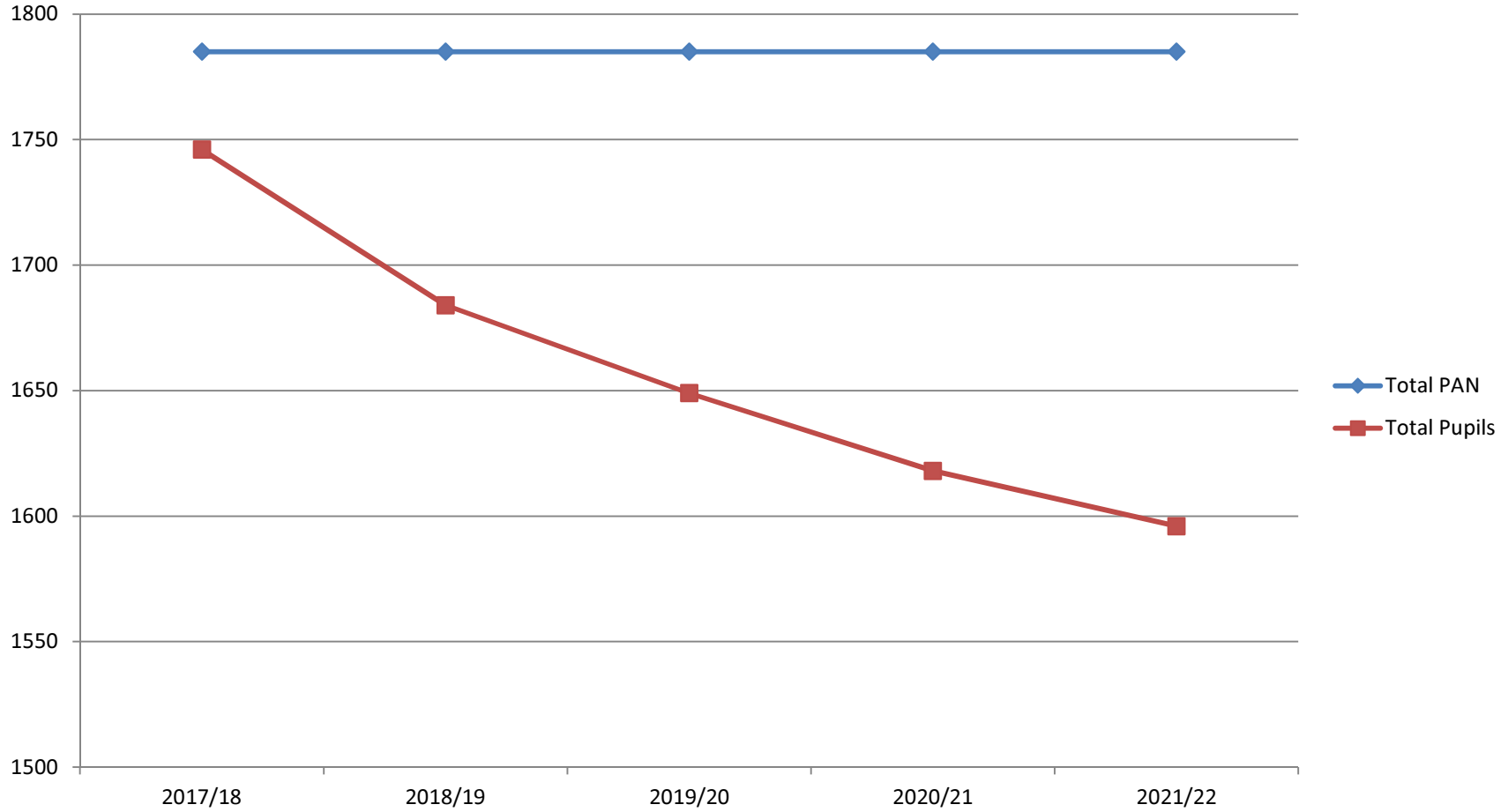
Bootle & Litherland Primary



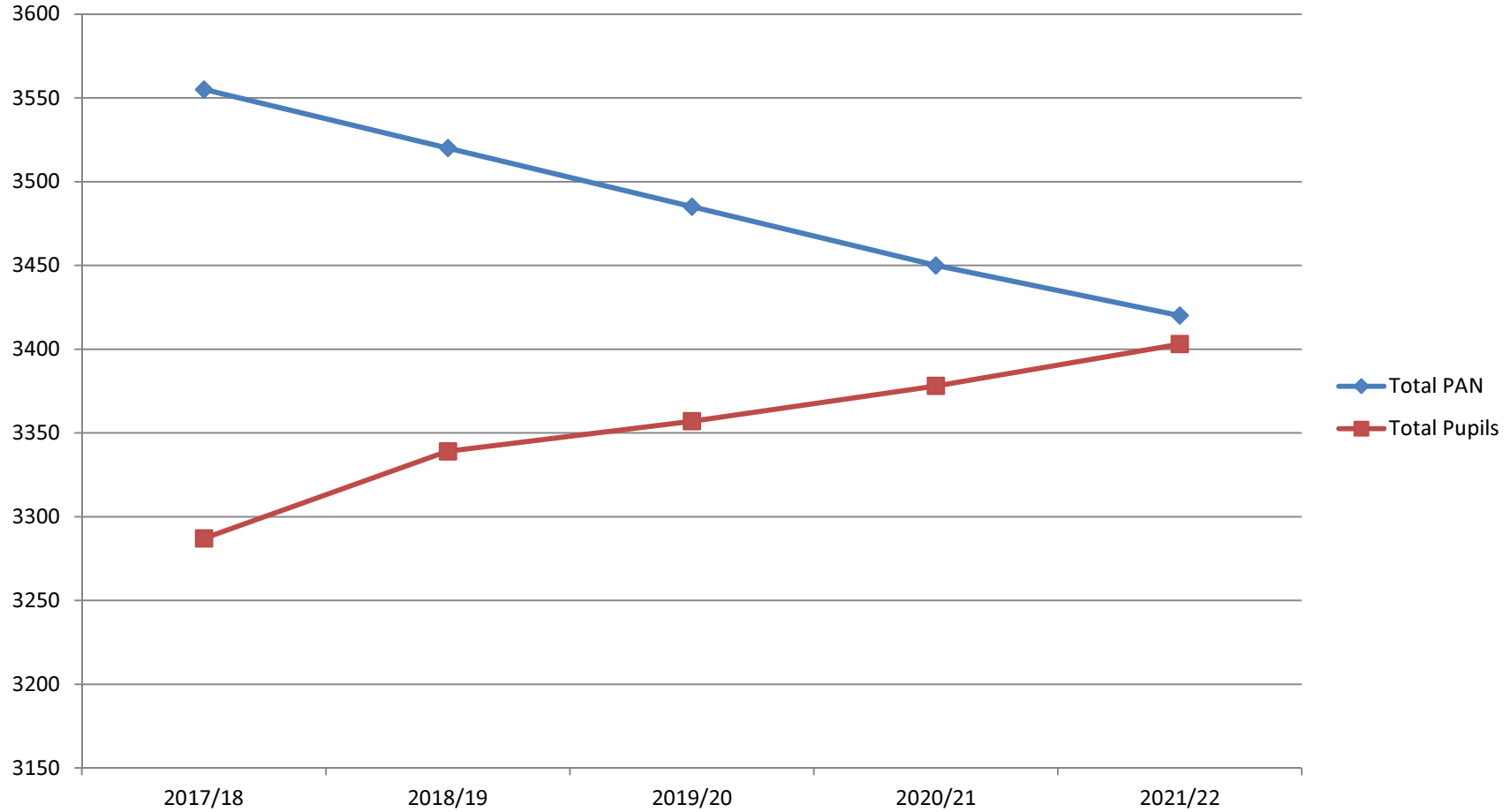
Crosby Primary



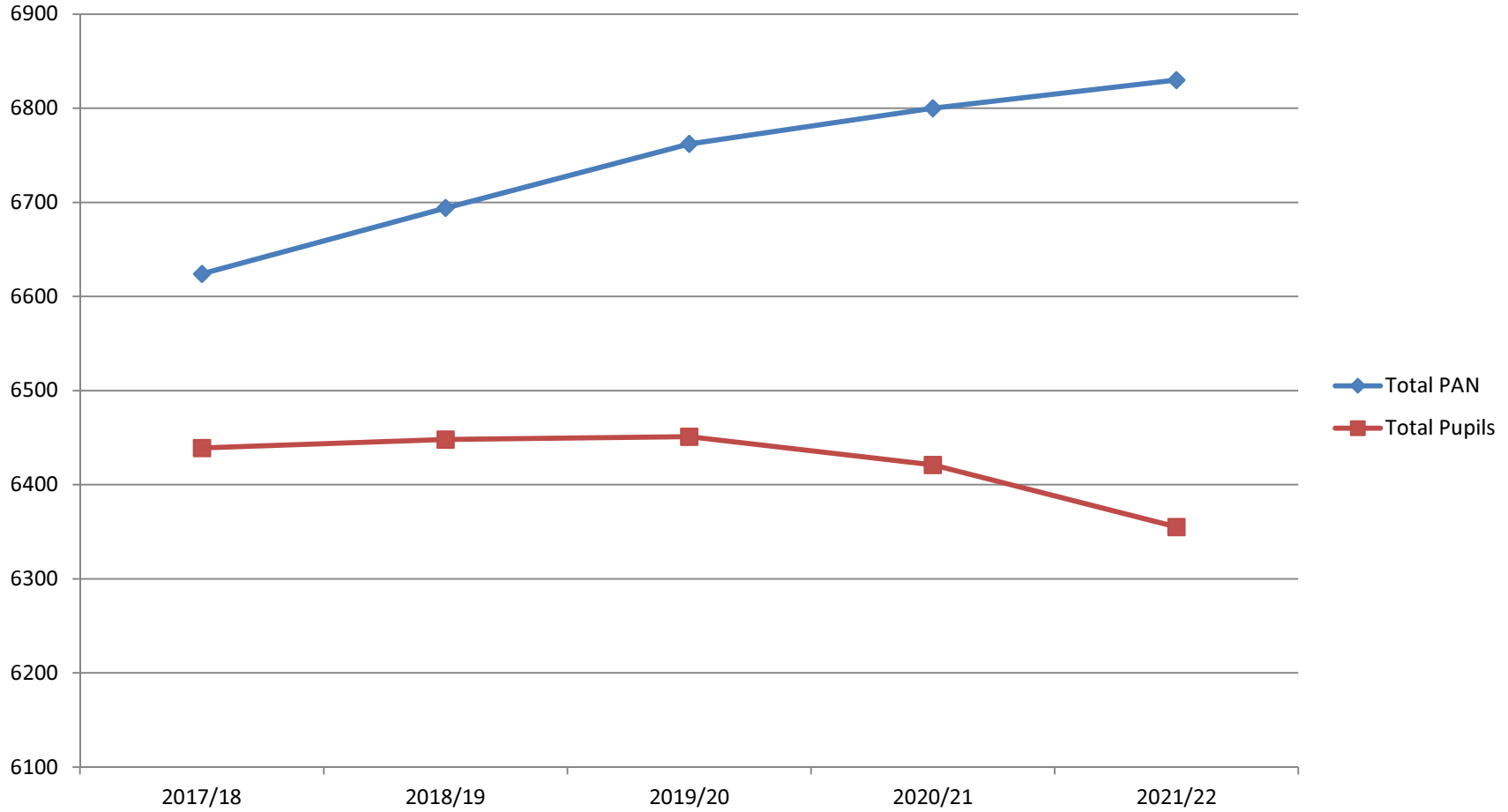
Formby Primary



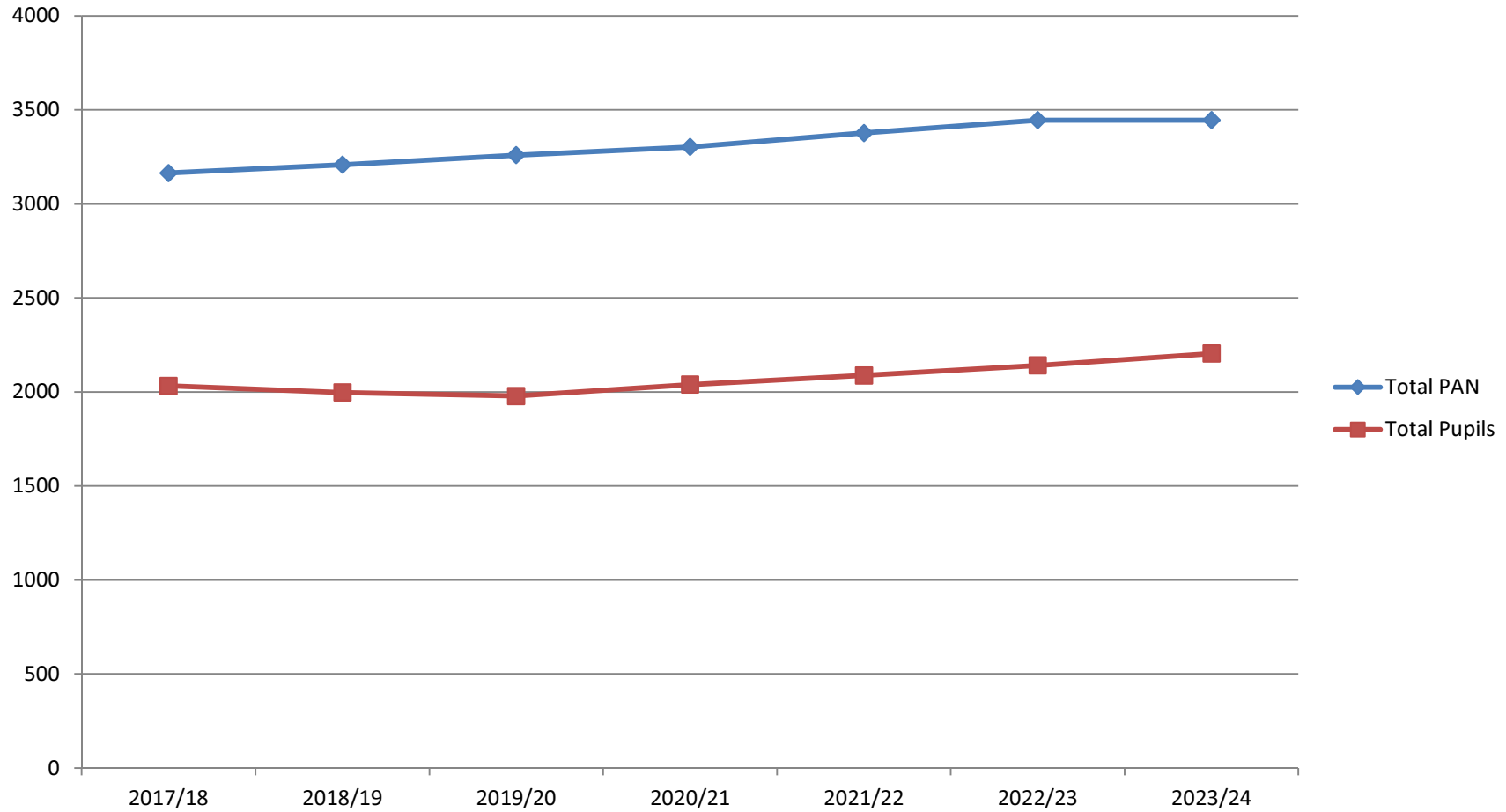
Maghull & Aintree Primary



Southport Primary

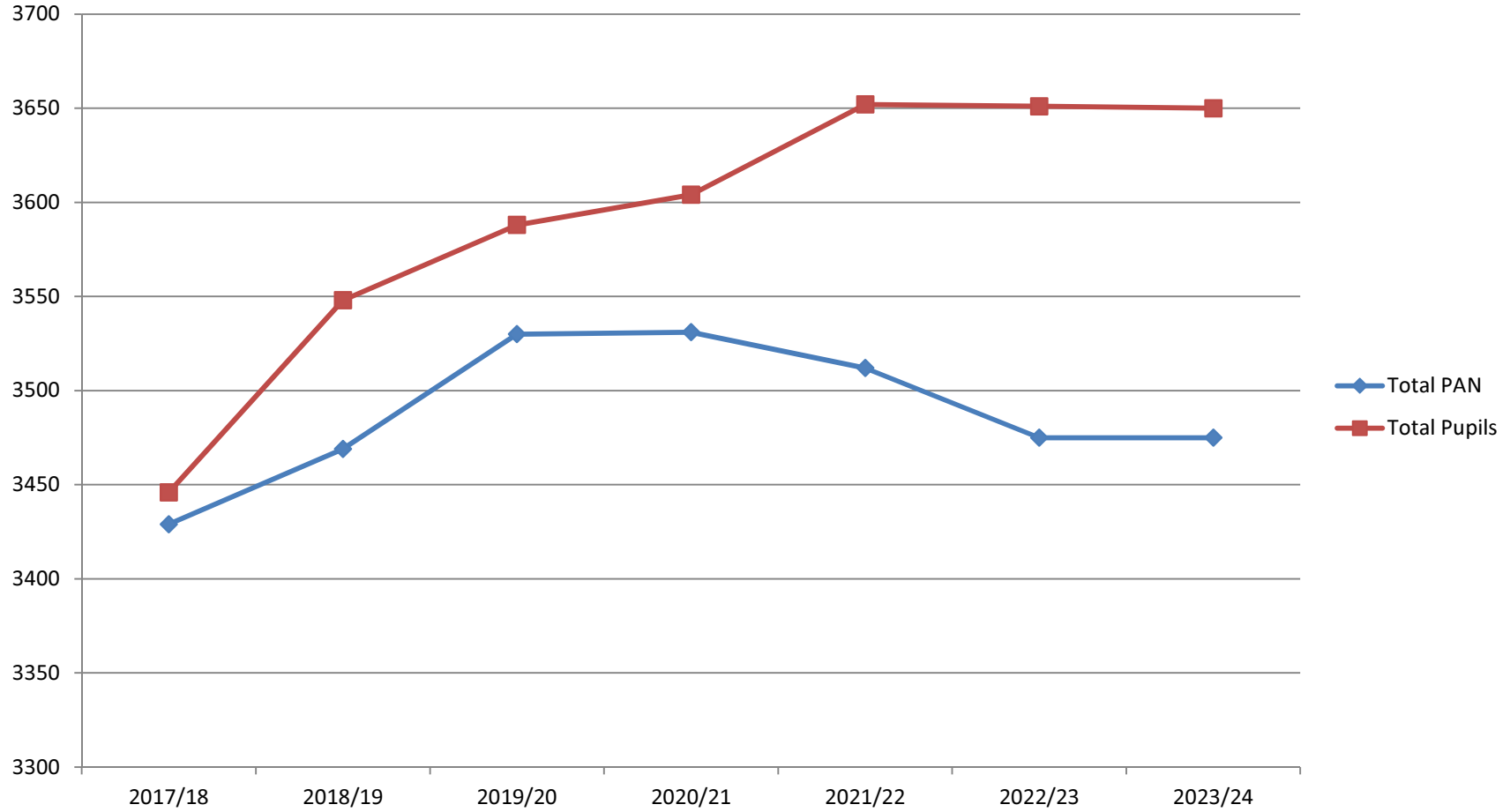


Bootle & Litherland Secondary

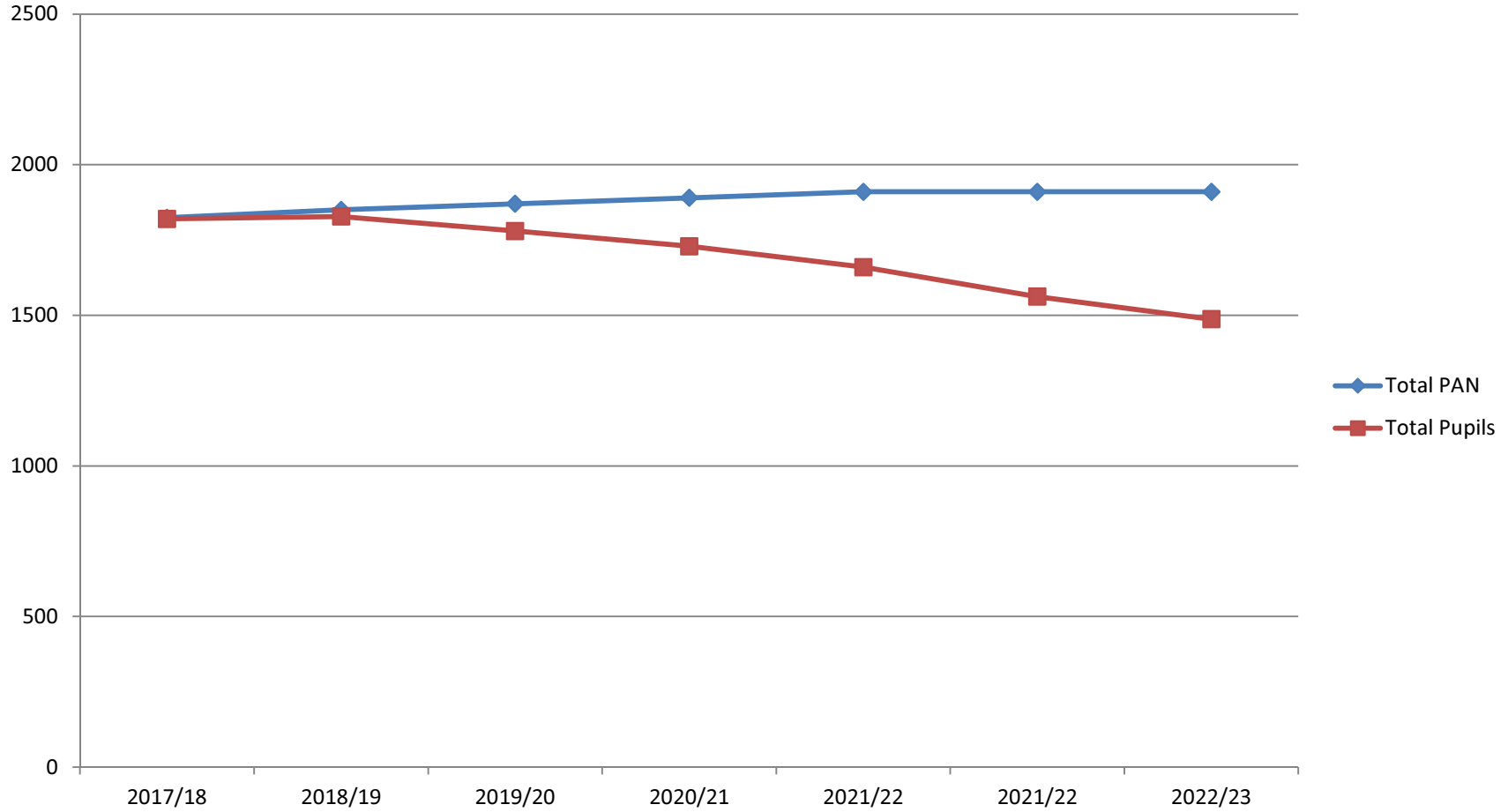


Crosby Secondary

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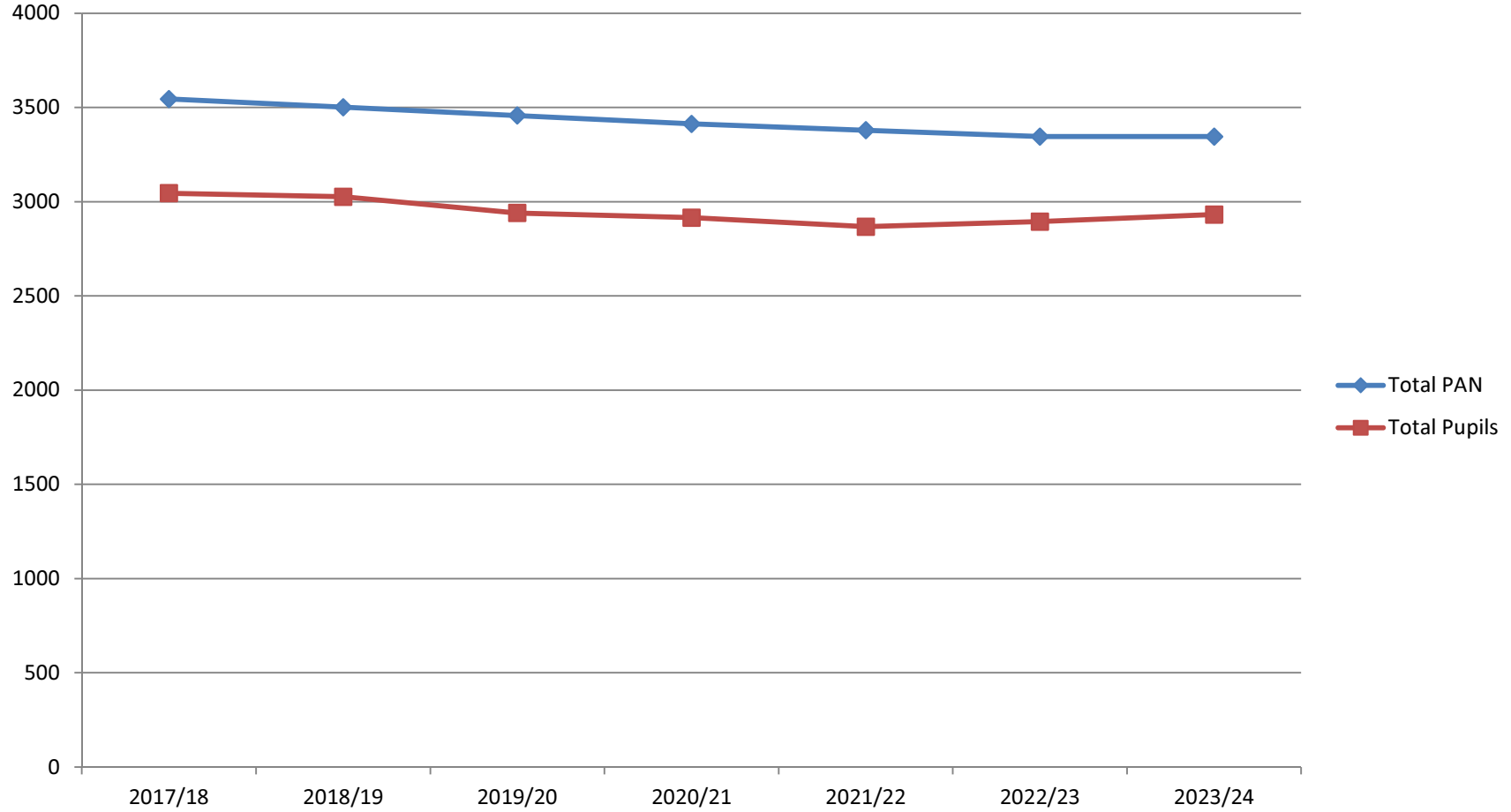


Formby Secondary

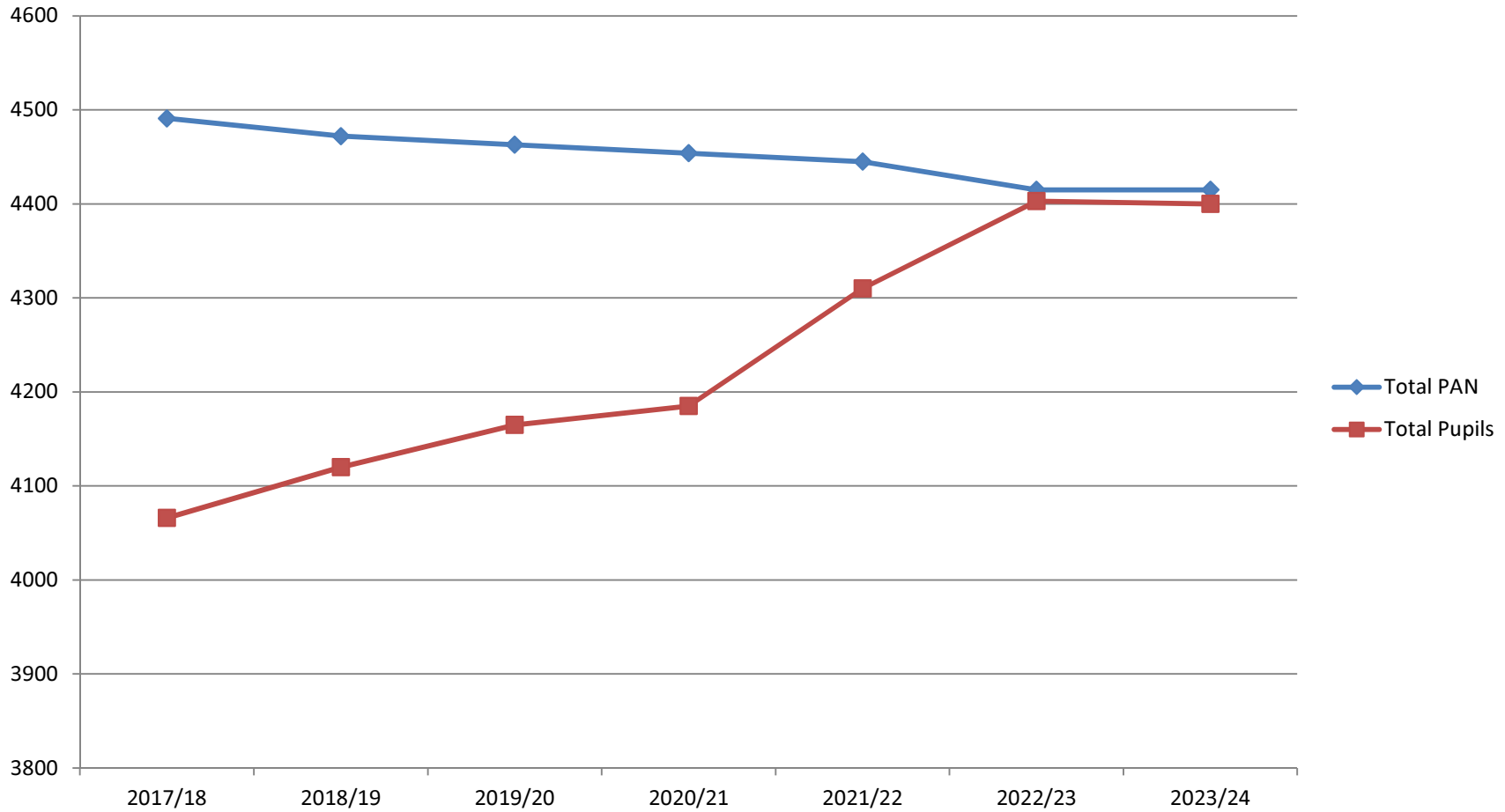


Maghull & Aintree Secondary

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Southport Secondary



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Pupil Place Plan
2016/2017 to 2021/2022

December 2017

Agenda Item 5

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Introduction

The data in this booklet is based on the School Census January 2017 and May 2017, the School Capacity Return 2017 (formerly known as the Surplus Places Return) and the birth data for 2016 and previous years from the Office for National Statistics (ONS). The pupil projections are the figures supplied to the Education Funding Agency as part of the School Capacity Return 2017.

School Organisation Team
Sefton Council
Email: school.organisation@sefton.gov.uk

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Structure and Characteristics of School Provision

At the beginning of the 2017//2018 academic year there were 18 (11 to 16 and 11 to 18) secondary schools including 11 academies and 1 free school, 70 primary schools, 3 infant schools, 2 junior schools, 5 special schools and 4 nursery schools in Sefton. 47 primary and infant schools have nursery classes. There were 10 secondary schools with sixth forms.

Table1: School Provision in Sefton

	Academies	Community	Voluntary Aided	Voluntary Controlled	Foundation	Free School
Nursery		4				
Primary		34	35	6		
Secondary	11	1	5	0		1
Special		4			1	
Pupil Referral Unit		2				

In addition to this the two FE colleges in Sefton now teach 14-16 curriculum.

The denominational sector is very strong in Sefton, particularly in the primary phase where community schools form 45.4% of the total, 33.3% of the schools are Catholic and 21.3% are Church of England. In the Secondary phase, five of the 18 (28%) high schools are Catholic aided schools and only one high school (5%) which is now an academy has Church of England status. The Hawthorne's Free School opened on 1 September 2012. In September 2017 another high school converted to become an academy and there is a second high school and six primary schools in the process of converting.

All except two of the 18 secondary schools in Sefton are co-educational. Two academies in Southport are single sex, one for boys and one for girls.

Ten of the secondary schools have a sixth form. South Sefton College provides post-16 education for pupils in the Bootle and Litherland areas. The college merged with Hugh Baird FE College on 1st December 2017. The remaining 11-18 schools are located in the central area of the Borough with the exception of one in Southport. In Southport the vast majority of sixth formers attend sixth-form college whilst provision is made for Catholic students at Christ the King High School. In all parts of the Borough a number of sixth formers continue their studies in one of the two further education colleges.

There are two pupil referral units which provide education for excluded pupils and those at risk of exclusion. One provides for primary pupils (KS1-KS2) and the other secondary (KS3-KS4).

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Pre-school provision is provided through a combination of nursery schools, nursery units in primary schools, private nurseries and playgroups etc. There are 11 Children's Centres and 8 satellite centres in some of the most deprived areas of the Borough.

TRENDS IN PUPIL NUMBERS

Each year, the Authority produces five year forecasts for primary schools and seven year forecasts for secondary schools based on information from a variety of sources. The figures for primary pupil numbers are for January whilst those for secondary are for September when numbers are at their highest.

Methodology Used for Forecasting Pupil Numbers

Each year, following the completion of the January School Census Return which provides details of pupil numbers, projections of primary and secondary pupil numbers for the following years are updated.

The projections are based upon:

- the number of births in Sefton in the relevant year;
- pupil numbers, based upon School Census in January and October;
- trends in the pattern of admissions.

Primary Pupil Numbers

Forecasts of primary pupil numbers are based upon actual and estimated birth data provided by the Office for National Statistics (ONS). Each year, the LEA receives details of the actual births and all projections are updated accordingly. This however does not allow pupil numbers to be estimated for the whole of the planning period. Forecasts for these later years are based upon birth estimates provided by ONS and trends for each area.

The birth projections provided by ONS are updated every couple of years. The most recent projections available are the 2012 based figures. The most recent figures for actual births are for 2013 which are less than the 1993 based and 2010 based ONS projections but slightly higher than the 2012 based figures. The complexity of the relationship is indicated by the figures in Table 2.

Table 2: Actual and Projected Births in Sefton

Year	Actual Births	ONS 1993 Based Projections	ONS 1996 Based Projections	ONS 2004 Based Projections	ONS 2010 Based Projections	ONS 2012 Based Projections
1993	3,325	*	*	*	*	*
1994	3,176	3,536	*	*	*	*
1995	3,030	3,530	*	*	*	*
1996	3,018	3,512	*	*	*	*
1997	3,086	3,486	3,000	*	*	*
1998	2,879	3,449	3,000	*	*	*
1999	2,738	3,402	2,900	*	*	*
2000	2,701	3,354	2,900	*	*	*
2001	2,640	3,313	2,800	*	*	*
2002	2,557	3,277	2,800	*	*	*
2003	2,757	3,248	2,700	*	*	*
2004	2,727	3,226	2,700	*	*	*
2005	2,584	3,214	2,600	2,800	*	*
2006	2,713	3,208	2,600	2,700	*	*
2007	2,755	3,208	2,600	2,700	*	*
2008	2,718	3,209	2,600	2,600	*	*
2009	2,848	3,211	2,600	2,600	*	*
2010	2,862	3,212	2,500	2,600	*	*
2011	2,802	3,212	2,600	2,600	2,900	*
2012	2,795	3,210	2,600	2,700	2,900	*
2013	2,844	3,207	2,600	2,700	3,000	2,800
2014	2,778	3,200	2,500	2,700	3,000	2,800
2015	2,777	3,191	2,500	2,700	3,000	2,800
2016	2,805	3,176	2,500	2,700	3,000	2,800
2017		3,156	2,500	2,700	3,000	2,800
2018		3,131	2,500	2,700	3,000	2,800
2019		3,101	2,500	2,700	3,000	2,800
2020			2,500	2,700	3,000	2,800
2021			2,500	2,700	3,000	2,800
2022				2,700	2,900	2,700
2023				2,700	2,900	2,700
2024				2,700	2,900	2,700
2025				2,600	2,800	2,700
2026				2,600	2,800	2,700
2027				2,600	2,700	2,600
2028				2,600	2,700	2,600
2029				2,500	2,700	2,600
2030					2,700	2,600
2031					2,700	2,600
2032					2,600	2,600
2033					2,600	2,500
2034					2,600	2,500
2035					2,700	2,500
2036						2,500
2037						2,600

Birth data is adjusted to relate to school years (i.e. September to the following August) rather than calendar years and these figures are provided in Table 3.

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Table 3: Actual and Projected Births in Sefton

Birth Year	School Admission Year	Total Number of Births	Status of Births Data
1995/1996	2000/2001	3,024	Actual
1996/1997	2001/2002	3,052	Actual
1997/1998	2002/2003	2,983	Actual
1998/1999	2003/2004	2,809	Actual
1999/2000	2004/2005	2,720	Actual
2000/2001	2005/2006	2,672	Actual
2001/2002	2006/2007	2,599	Actual
2002/2003	2007/2008	2,657	Actual
2003/2004	2008/2009	2,742	Actual
2004/2005	2009/2010	2,656	Actual
2005/2006	2010/2011	2,649	Actual
2006/2007	2011/2012	2,734	Actual
2007/2008	2012/2013	2,737	Actual
2008/2009	2013/2014	2,783	Actual
2009/2010	2014/2015	2,855	Actual
2010/2011	2015/2016	2,833	Actual
2011/2012	2016/2017	2,799	Actual
2012/2013	2017/2018	2,820	Actual
2013/2014	2018/2019	2,811	Actual
2014/2015	2019/2020	2,755	Actual
2015/2016	2020/2021	2,803	Actual

Where estimated, the Sefton totals are subdivided by area on the basis of the percentage of the total number of births which occurred in that area averaged over the last three years and adjusted as necessary to take account of trends; details are provided in Table 4. The area births, expressed as a percentage of Sefton births vary from year to year and this in turn affects the projected number of pupils admitted to reception classes in any year.

Table 4: Area Births as a Percentage of Sefton Births in 2016

Area	% of Sefton Births
Bootle	25.97
Litherland	12.20
Crosby	16.95
Formby	4.67
Maghull & Aintree	11.06
Southport	29.15
SEFTON	100.00

Overall reception pupil numbers are then determined by establishing the relationship between the number of pupils who actually entered reception classes in the last

three years and the number of births in the appropriate preceding years and then applying the three-year average to the births data.

For Sefton as a whole, this results in a slight increase in the number of pupils for whom primary school places must be provided. This increase in numbers varies slightly from year to year and is not evenly distributed across the different areas of the Borough as Table 5 shows.

Table 5: Relationship between Births and Intake into Reception Classes, 2016

Area	Reception Year Intake as % of Births in Appropriate Preceding Year
Bootle	78.8
Litherland	88.4
Crosby	119.9
Formby	149.1
Maghull & Aintree	163.9
Southport	98.7
SEFTON	105.6

Several factors contribute to this increase in pupil numbers. The shape of the Borough of Sefton and the extent to which a number of Sefton schools are located close to centres of population in neighbouring LEAs have resulted in a situation whereby a number of extra-district pupils are able to gain admission to Sefton schools on distance criteria. In January 2013 there were 1,046 (5.3%) primary pupils residing in other local authorities attending schools maintained by Sefton and 462 (2.4%) primary pupils residing in Sefton attending schools maintained by other local authorities.(Source: DFE Cross border movement LA tables_SFR21_2013). By January 2017 there were 1,144 primary pupils (5.5%) residing in other local authorities attending schools maintained by Sefton which was a slight reduction since January 2016 and 600 (3%) primary pupils residing in Sefton attending schools maintained by other local authorities which was a slight increase since January 2016.(Source: DFE Cross Border Migration Local Authority Tables SFR28-2017).

In addition, there is a marked south-north population movement within Sefton and the movement of families impacts upon the demand for school places in both the origin and destination areas. In the southern part of the Borough pupil turnover levels are very high. In some primary schools less than half of the pupils who entered as reception pupils are still on roll in Year 6. An increasing number of pupils are being admitted to Sefton schools from abroad, in particular from Eastern Europe, and these numbers can have a considerable effect on pupil projections.

The projected total number of primary pupils is calculated for each year by moving forward the numbers in the existing primary year groups and incorporating the projected number of reception pupils to be admitted in that year.

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Secondary Pupil Numbers

Forecasts of secondary pupil numbers are calculated in a similar way to primary pupil numbers but are based upon the Year 6 cohort and the relationship between this and the intake into secondary schools.

At Authority level, the number of pupils admitted to Year 7 classes in secondary schools in September each year is slightly higher than the Year 6 cohort that left the primary sector at the end of the preceding term. However, at area level the pattern is one of contrasts, with some areas gaining large numbers of pupils whilst others lose significant numbers. Details for the cohort that transferred to the secondary phase in September 2016 are provided in Table 6.

In January 2013 there were 1,904 (12%) secondary pupils residing in other local authorities attending schools maintained by Sefton and 340 (2.4%) secondary pupils residing in Sefton attending schools maintained by other local authorities. (Source: DFE Cross border movement LA tables_SFR21_2013). By January 2017 there were 1,637 (11.5%) secondary pupils residing in other local authorities attending schools maintained by Sefton which is a slight reduction since January 2016 and 542 (4.1%) secondary pupils residing in Sefton attending schools maintained by other local authorities which is a slight increase since January 2016. (Source: DFE Cross Border Migration Local Authority Tables: SFR28-2017).

Table 6: Changes in Pupil Numbers at Transition from Primary to Secondary Schools in 2016

Area	Year 7 Pupil Numbers (September 2016) as a % of Year 6 Pupil Numbers (January 2016)
Bootle	55.5
Litherland	52.3
Crosby	137.0
Formby	135.8
Maghull & Aintree	128.8
Southport	92.1
SEFTON	101.4

The projected total number of secondary pupils is calculated for each year by moving forward the numbers in the existing secondary year groups and incorporating the projected numbers of Year 7 pupils and post 16 pupils. However, as surplus places increase in some schools whilst other more popular schools remain full, adjustments are made to pupil projections to more accurately reflect these emerging trends.

Pupil yield from housing developments with planning permission have been included in the projections where Sefton's Planning Department have obtained information about proposed phasing from developers. There are a number of large

developments included in Sefton’s Local Plan which do not have planning permission so they have not been included in the current projections as directed by the Education Funding Agency but we will continue to monitor the progress on these sites.

Primary Pupil Numbers and Projections

Table 7: Primary Pupil Numbers in Sefton from 1996 to 2022

Academic Year	Total Number of Primary Pupils (January)
1999/2000	24,541
2000/2001	24,105
2001/2002	23,569
2002/2003	22,850
2003/2004	22,271
2004/2005	21,707
2005/2006	21,178
2006/2007	20,658
2007/2008	20,160
2008/2009	19,796
2009/2010	19,588
2010/2011	19,661
2011/2012	19,601
2012/2013	19,743
2013/2014	19,903
2014/2015	20,051
2015/2016	20,331
2016/2017	20,620
2017/2018*	20,892
2018/2019*	21,056
2019/2020*	21,195
2020/2021*	21,207
2021/2022*	21,256

* Projected

Table 8: Reception Pupil Numbers in Sefton from 1999/2000 to 2021/2022

Academic Year	Total Number of Reception Pupils (January)
1999/2000	3,123
2000/2001	3,142
2001/2002	3,186
2002/2003	3,018
2003/2004	2,899

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2004/2005	2,838
2005/2006	2,714
2006/2007	2,660
2007/2008	2,761
2008/2009	2,800
2009/2010	2,743
2010/2011	2,876
2011/2012	2,868
2012/2013	2,893
2013/2014	2,910
2014/2015	2,961
2015/2016	3,067
2016/2017	2,974
2017/2018*	3,053
2018/2019*	3,017
2019/2020*	3,001
2020/2021*	2,998
2021/2022*	3,001

* Projected

Secondary Pupil Numbers and Projections

Table 9: Secondary Pupil Numbers in Sefton from 1999/2000 to 2022/23

Year (January)	Total Number of Secondary Pupils (including sixth form)
2000	20,296
2001	20,676
2002	20,780
2003	21,281
2004	21,222
2005	20,919
2006	20,416
2007	19,962
2008	19,469
2009	19,300
2010	19,207
2011	18,869
2012	18,603
2013	18,365
2014	17,895
2015	17,461
2016	17,003
2017	16,642
2017*	16,342
2018*	16,437
2019*	16,439

2020*	16,510
2021*	16,598
2022*	16,679
2023*	16,709

* September forecasts

Table 10: Year 7 Pupil Numbers in Sefton 1999/2000 to 2022/23

Year (January)	Total Number of Year 7 Pupils
2000	3,769
2001	3,797
2002	3,850
2003	3,971
2004	3,661
2005	3,512
2006	3,362
2007	3,358
2008	3,349
2009	3,430
2010	3,265
2011	3,141
2012	3,049
2013	2,931
2014	2,859
2015	2,936
2016	2,900
2017	2,824
2017*	2,930
2018*	2,885
2019*	2,865
2020*	2,921
2021*	2,936
2022*	3,006
2023*	2,914

* September forecasts

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Table 11: Sixth Form Pupil Numbers in Sefton 1999/2000 to 2022/23

Year (January)	Total Number of Sixth Form Pupils
2000	2,038
2001	2,117
2002	1,998
2003	2,136
2004	2,089
2005	2,034
2006	2,027
2007	2,085
2008	2,230
2009	2,312
2010	2,463
2011	2,367
2012	2,371
2013	2,513
2014	2,694
2015	2,663
2016	2,437
2017	2,347
2017*	1933*
2018*	1918*
2019*	1988*
2020*	2038*
2021*	2021*
2022*	2028*
2023*	2036*

* September forecasts

SEFTON'S PLANNING AREAS

Sefton's planning areas are based on geographical and ward boundaries. Some of the planning areas were re-organised in 2017 following the closure of St Ambrose Barlow Catholic High school in August 2016. Two secondary schools in Bootle had already closed (Bootle High and St George of England High) leaving only three schools and St Wilfrid's High had closed in the Litherland secondary planning area leaving one school which was Litherland High. As a result of the secondary school closures some of the feeder primary schools have been moved to other secondary schools so the Bootle and Litherland secondary planning areas have been

amalgamated into one area to align them with Sefton’s admission areas. To correspond with this the three former Bootle and Litherland primary planning areas (Bootle North, Bootle South and Litherland) have been amalgamated to form the “Bootle & Litherland primary planning area”. There are now ten planning areas: five for primary and five for secondary as agreed with the Education Funding Agency for the SCAP 2017 return.

Table 12: Sefton’s Primary Planning Areas

Primary Planning Area	Schools
Bootle & Litherland	Bedford Community Primary Linacre Community Primary Netherton Moss Community Primary Springwell Park Community Primary The Grange Community Primary Thomas Gray Community Primary Christ Church CE Primary St Oswald’s CE Primary All Saints Catholic Primary Holy Spirit Catholic Primary Our Lady of Walsingham Catholic Primary St Benedict’s Catholic Primary St Monica’s Catholic Primary St Robert Bellarmine Catholic Primary Hatton Hill Community Primary Lander Road Community Primary Litherland Moss Community Primary St Philip’s CE Primary English Martyr’s Catholic Primary Our Lady Queen of Peace Catholic Primary Our Lady Star of the Sea Catholic Primary St Elizabeth’s Catholic Primary
Crosby	Forefield Community Junior Forefield Community Infant Valewood Community Primary Waterloo Community Primary Rimrose Hope CE Primary St John’s CE Primary St Luke’s Halsall CE Primary St Nicholas’ CE Primary Great Crosby Catholic Primary St Edmund’s & St Thomas’ Catholic Primary St Mary’s Catholic Primary St William of York Catholic Primary

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	Ursuline Catholic Primary
Formby	Freshfield Community Primary Redgate Community Primary Woodlands Community Primary St Luke's CE Primary Trinity St Peter's CE Primary Our Lady of Compassion Catholic Primary St Jerome's Catholic Primary
Maghull & Aintree	Aintree Davenhill Community Primary Green Park Community Primary Hudson Community Primary Lydiate Community Primary Melling Community Primary Northway Community Primary Summerhill Community Primary St Andrew's CE Primary St Thomas' CE Primary (Academy from 1.11.17) Holy Rosary Catholic Primary St George's Catholic Primary St Gregory's Catholic Primary St John Bosco Catholic Primary
Southport	Birkdale Community Primary Churchtown Community Primary Farnborough Road Community Junior Farnborough Road Community Infant Kew Woods Community Primary Kings Meadow Community Primary Larkfield Community Primary Linaker Community Primary Marshside Community Primary Norwood Community Primary Shoreside Community Primary Ainsdale St John's CE Primary Bishop David Sheppard CE Primary Holy Trinity CE Primary (Academy from 1.2.18) St John's CE Primary St Philip's CE Primary Holy Family Catholic Primary Our Lady of Lourdes Catholic Primary St Patrick's Catholic Primary St Teresa's Catholic Infant

Table 13: Sefton's Secondary Planning Areas

Secondary Planning Area	Schools
Bootle & Litherland	Hillside High (Academy) The Hawthorne's Free School Savio Salesian Catholic College Litherland High (Academy)
Crosby	Chesterfield High (Academy) St Michael's CE High (Academy) Holy Family Catholic High Sacred Heart Catholic High
Formby	Formby High (Academy) Range High (Academy)
Maghull & Aintree	Deyes High (Academy) Maghull High (Academy) Maricourt Catholic High
Southport	Birkdale High (Boys Academy) Greenbank High (Girls Academy) Meols Cop High Stanley High (Academy) Christ the King Catholic High

Planning areas are shown on the map at Annex 1.

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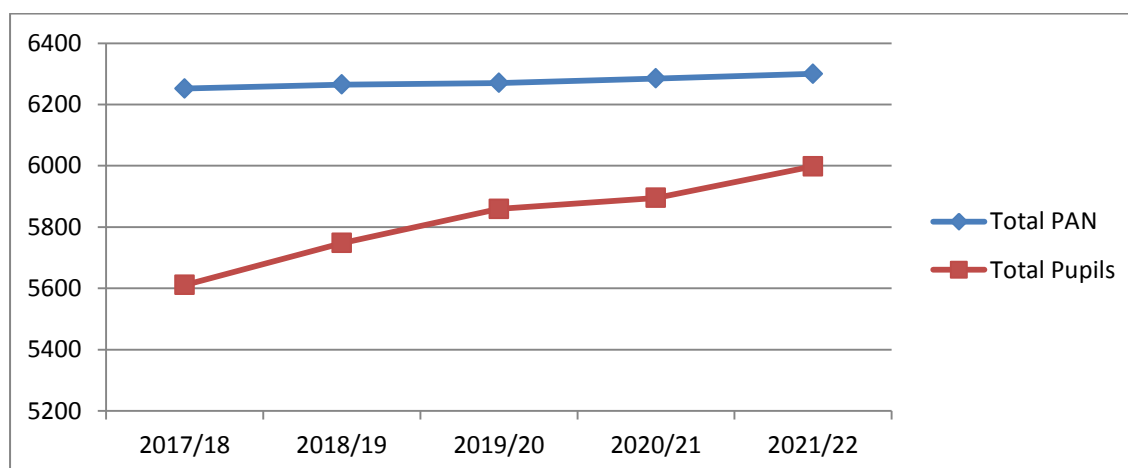
Pupil Projections by Planning Area

The following pupil projections were submitted to the Education Funding Agency as part of the SCAP 2017 return.

The Total Planned Admission Number (PAN) is calculated using the planned admission number for each year group in each school. This may vary from year group to year group depending on changes made in previous years. Future changes to PANs are included where these are known in advance. Some of the secondary academy schools in Sefton have started to cap or reduce their intake numbers in Year 8 to 11 as they are unable to admit further pupils after the entry year due to their internal school organisational arrangements. This makes planning future places very difficult as the situation may change on a yearly basis. Sixth Form numbers are not included in the secondary figures as there are no planned admission numbers for Years 12 and 13.

Table 14: Bootle & Litherland Primary

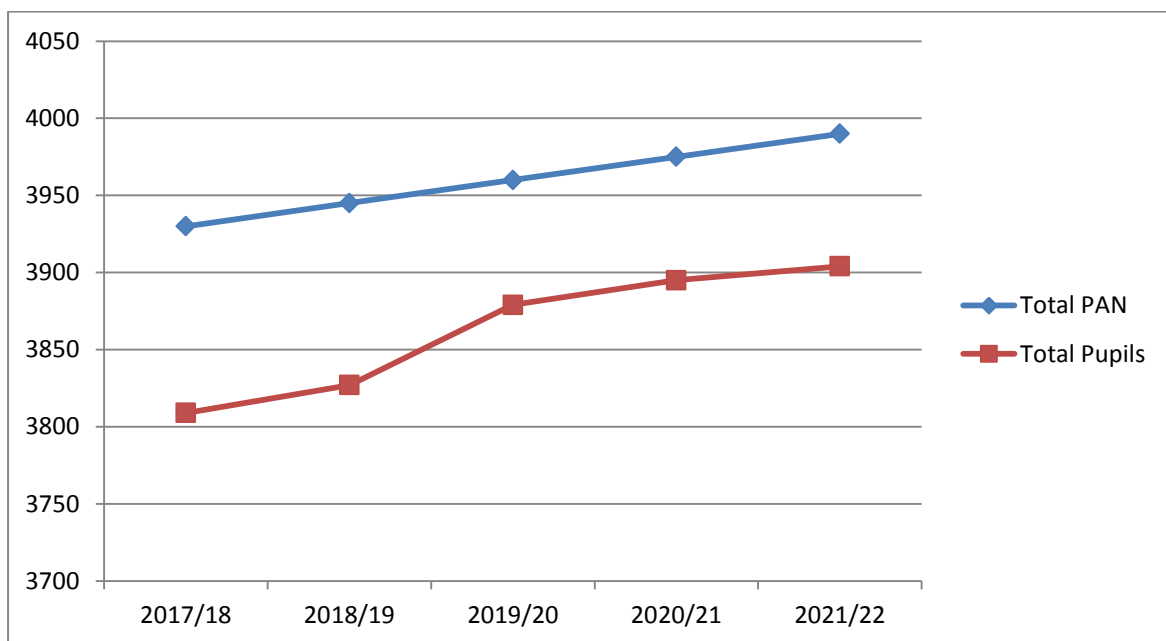
Year	Total PAN	R	Y1	Y2	Y3	Y4	Y5	Y6	Total
2017/18	6252	853	832	848	787	801	772	718	5611
2018/19	6265	851	856	835	851	790	790	775	5748
2019/20	6270	860	853	858	837	853	792	806	5859
2020/21	6285	858	860	853	858	837	837	792	5895
2021/22	6300	861	861	863	856	861	840	856	5998



Births in this area have remained stable. Overall intakes into Reception have also remained stable. Additional pupil yield has been included to allow for the housing developments in the area.

Table 15: Crosby Primary

Year	Total PAN	R	Y1	Y2	Y3	Y4	Y5	Y6	Total
2017/18	3930	561	538	557	553	546	520	534	3809
2018/19	3945	562	561	538	557	553	546	520	3837
2019/20	3960	562	562	561	538	557	553	546	3879
2020/21	3975	562	562	562	561	538	557	553	3895
2021/22	3990	562	562	562	562	561	538	557	3904

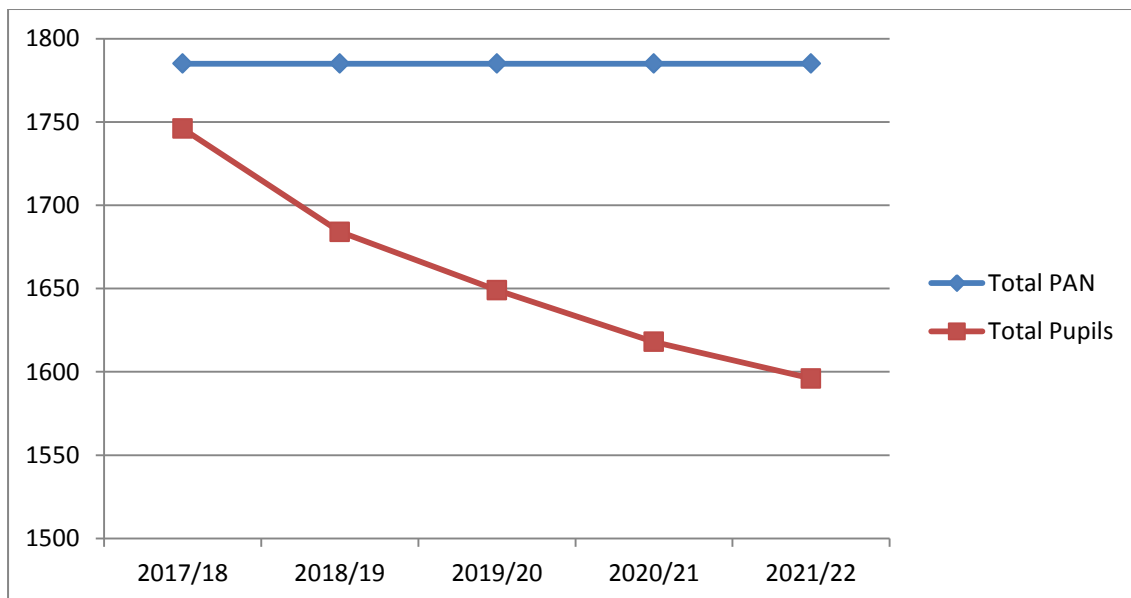


Births in the area continued to rise until 2014/15 when they dropped but rose again the following year. Pupil projections indicate that pupil numbers will continue to rise. Pupil places have risen year by year since September 2015 due to the additional places added in the Catholic sector but this will stabilise by 2021/22.

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Table 16: Formby Primary

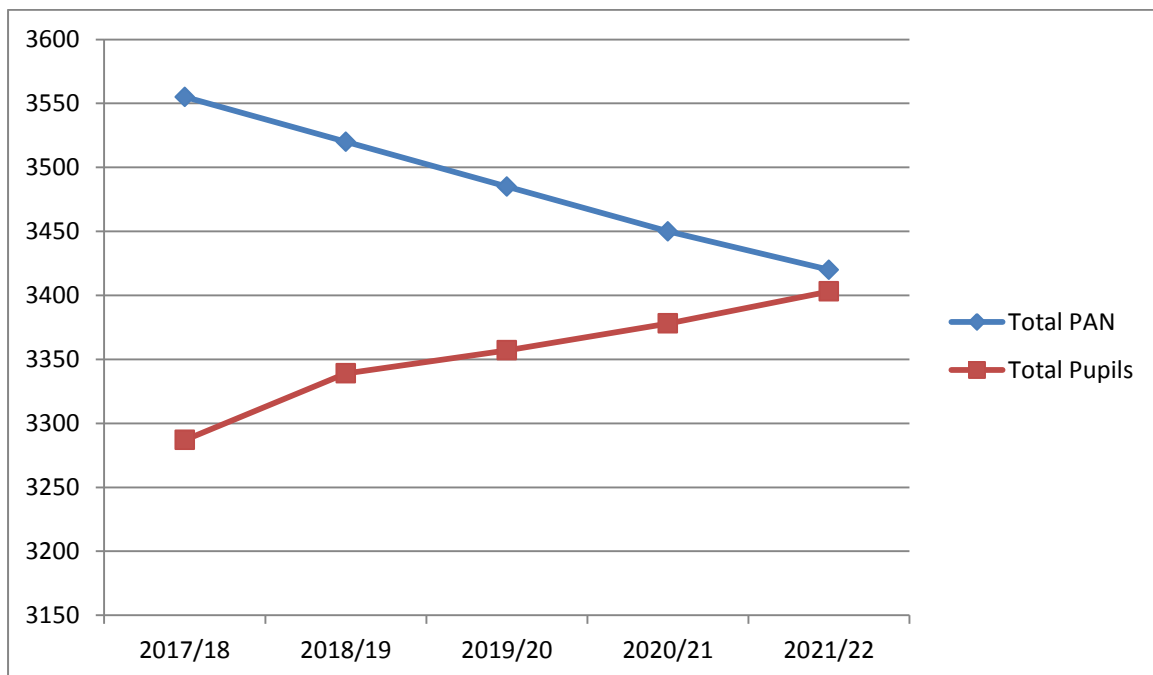
Year	Total PAN	R	Y1	Y2	Y3	Y4	Y5	Y6	Total
2017/18	1785	229	234	234	244	253	257	295	1746
2018/19	1785	227	230	235	235	245	254	258	1684
2019/20	1785	223	227	230	235	235	245	254	1649
2020/21	1785	223	223	227	230	235	235	245	1618
2021/22	1785	223	223	223	227	230	235	235	1596



Births in this area have been reducing since 2007/08 and intakes into Reception have reduced overall since 2015. These trends are causing the pupil projections to start to reduce over the next five years even though additional pupil yield has been included for proposed housing developments in the area.

Table 17: Maghull & Aintree Primary

Year	Total PAN	R	Y1	Y2	Y3	Y4	Y5	Y6	Total
2017/18	3555	471	485	491	457	462	474	447	3287
2018/19	3520	481	474	488	494	460	465	477	3339
2019/20	3485	483	483	476	490	496	462	467	3357
2020/21	3450	482	484	484	477	491	497	463	3378
2021/22	3420	482	483	485	485	478	492	498	3403

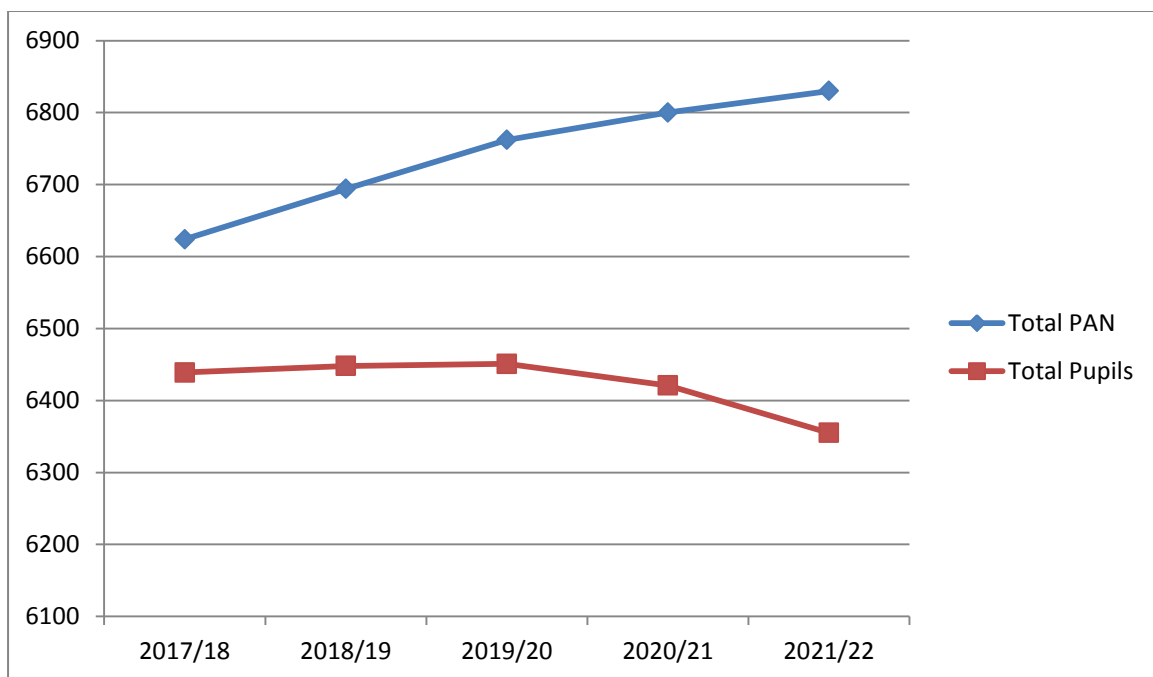


Birth rates have remained stable for this area which is also subject to pupil migration from other local authority areas. Intakes to Reception have also increased overall since 2015. The total PAN is reducing year by year as one of the schools has reduced their PAN by 1FE (30 places) from 2017/18 onwards and this change is working through the year groups. Additional pupil yield has also been included to allow for housing developments in the area.

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Table 18: Southport Primary

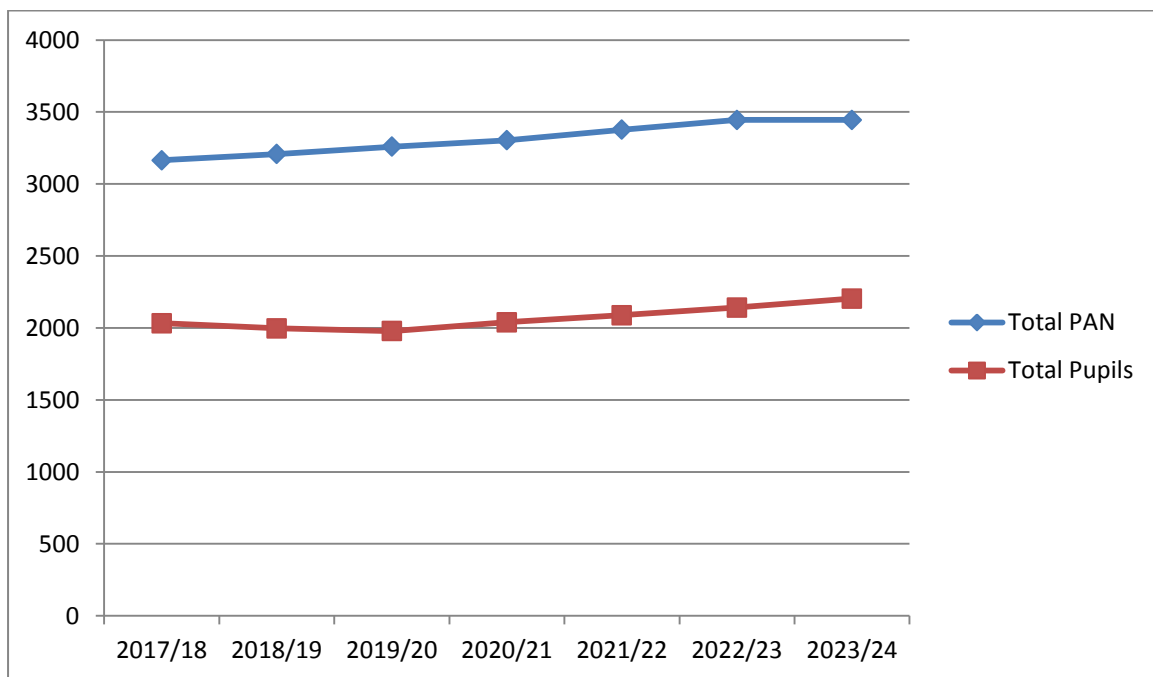
Year	Total PAN	R	Y1	Y2	Y3	Y4	Y5	Y6	Total
2017/18	6624	939	900	956	943	916	886	899	6439
2018/19	6694	896	941	902	958	945	918	888	6448
2019/20	6762	873	899	944	905	961	948	921	6451
2020/21	6800	873	876	902	947	908	964	951	6421
2021/22	6830	873	875	878	904	949	910	966	6355



Birth rates for this area have been reducing since 2009/10 and overall intakes into Reception have also reduced since 2015. This trend has resulted in a reduction in the pupil projections towards the end of the five year period. Additional pupil yield has been included in the projections to allow for housing developments in the area. Pupil places continue to rise due to additional places being added in central Southport from 2016/17 onwards. This should stabilise by 2022/23.

Table 19: Bootle & Litherland Secondary

Year	Total PAN	Y7	Y8	Y9	Y10	Y11	Total
2017/18	3164	405	383	376	439	429	2032
2018/19	3208	382	408	386	379	442	1997
2019/20	3259	425	383	409	384	377	1978
2020/21	3303	434	426	384	410	385	2039
2021/22	3377	426	436	428	386	412	2088
2022/23	3445	459	428	439	430	385	2141
2023/24	3445	446	460	429	439	430	2204

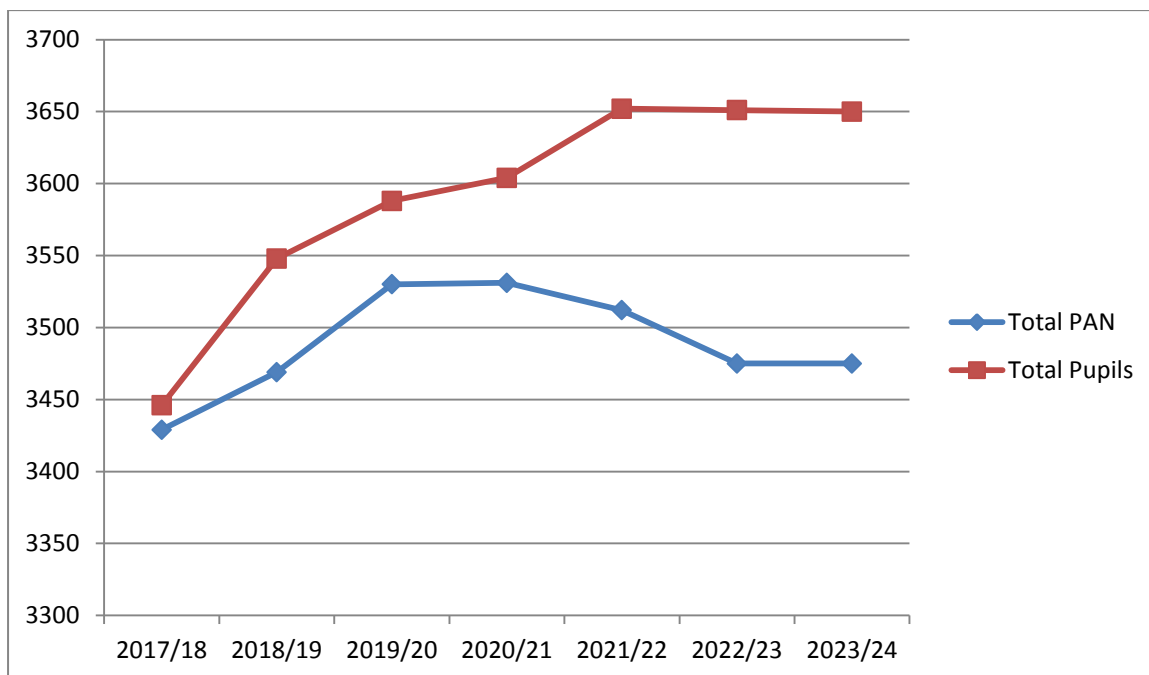


Pupil projections indicate that numbers will start to increase from 2020/21 onwards. Additional pupil yield has been included in the projections to allow for housing developments in the area.

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Table 20: Crosby Secondary

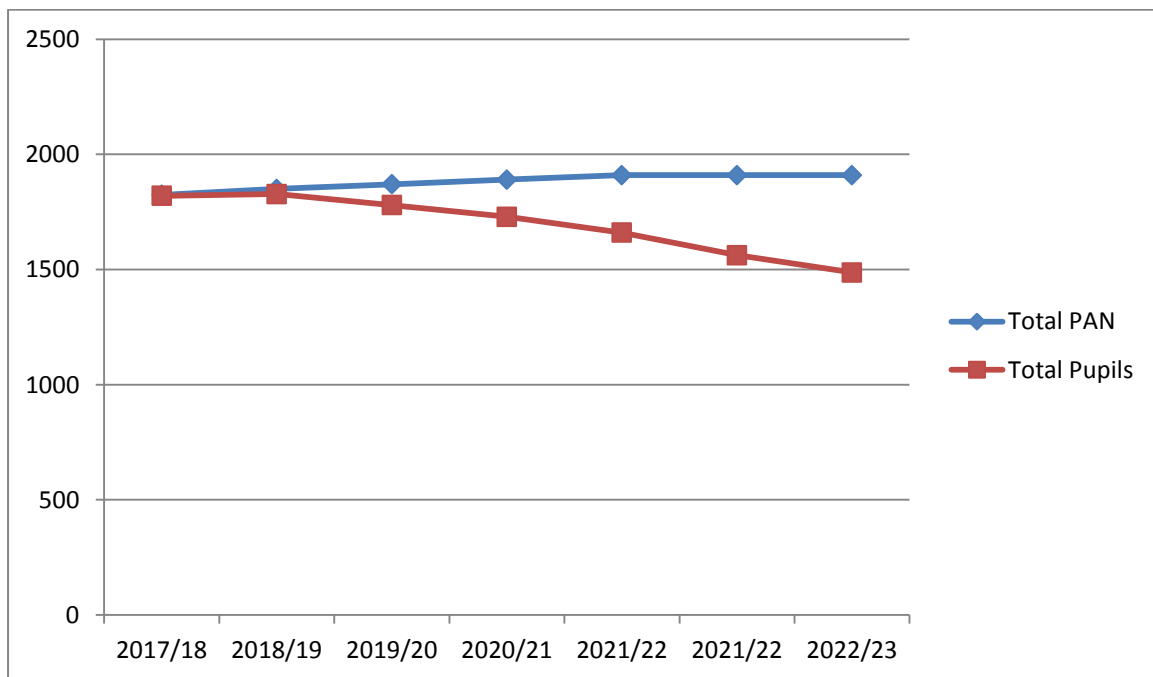
Year	Total PAN	Y7	Y8	Y9	Y10	Y11	Total
2017/18	3429	747	697	719	656	627	3446
2018/19	3469	729	747	697	719	656	3548
2019/20	3530	696	729	747	697	719	3588
2020/21	3531	735	696	729	747	697	3604
2021/22	3512	745	735	696	729	747	3652
2022/23	3475	746	745	735	696	729	3651
2023/24	3475	728	746	745	735	696	3650



Pupil projections continue to rise based on the pupil numbers in the primary sector in this area and have exceeded the total PAN. This is also partly due to intake numbers being capped by the two academies in the area which makes planning school places very difficult. The situation in Crosby will be kept under review

Table 21: Formby Secondary

Year	Total PAN	Y7	Y8	Y9	Y10	Y11	Total
2017/18	1824	382	366	359	362	351	1820
2018/19	1850	359	382	366	359	362	1828
2019/20	1870	314	359	382	366	359	1780
2020/21	1890	308	314	359	382	366	1729
2021/22	1910	297	308	314	359	382	1660
2022/23	1910	284	297	308	314	359	1562
2023/24	1910	284	284	297	308	314	1487

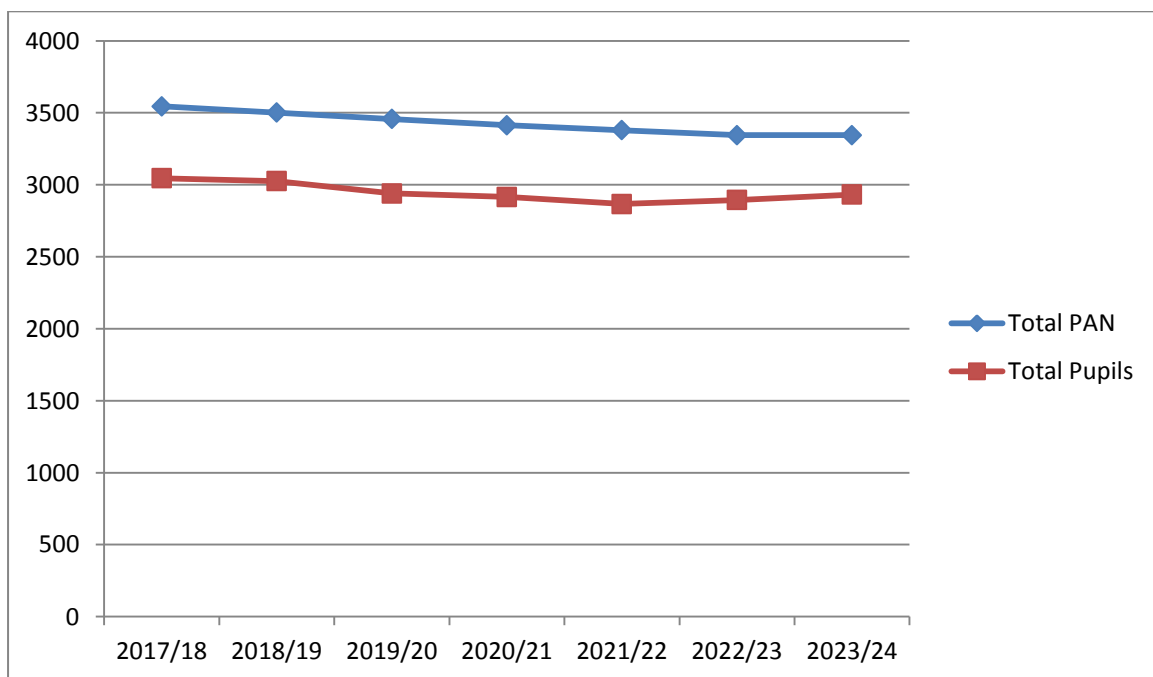


Pupil places are continuing to grow until 2021/22 due to changes in the school admission numbers while pupil projections are declining based on the current numbers of pupils in the primary sector. However, as the schools in this area are popular it is likely that places would be filled by pupils from outside the area. Additional pupil yield has been included in the projections to allow for housing developments in the area

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Table 22: Maghull & Aintree Secondary

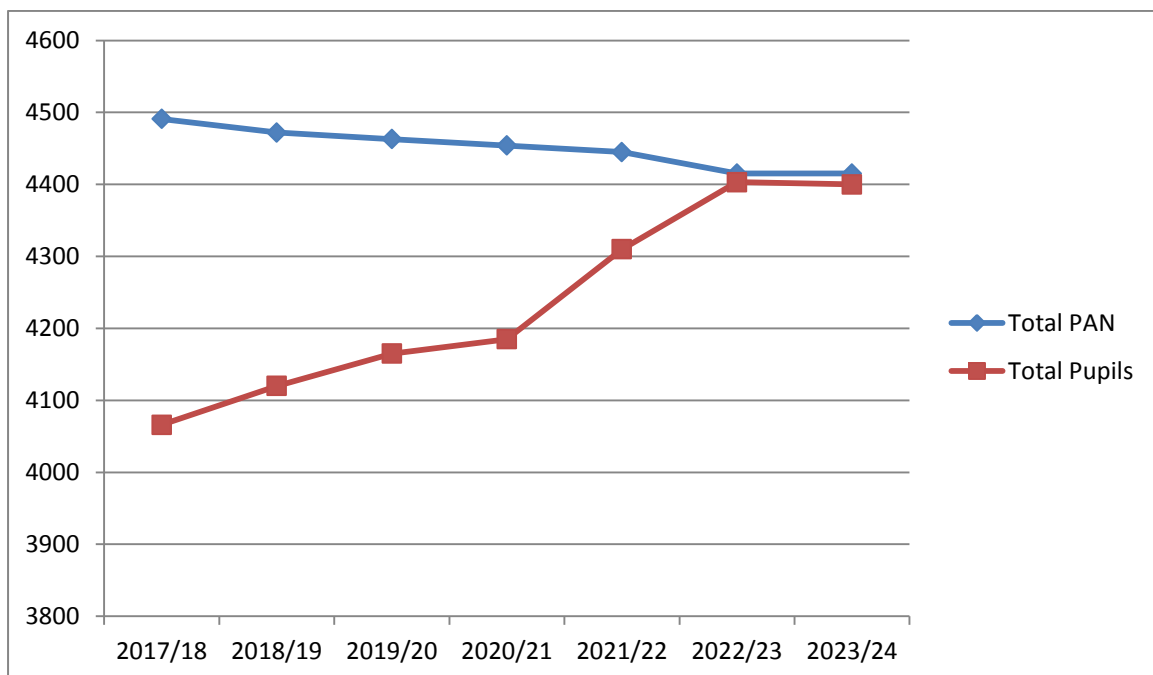
Year	Total PAN	Y7	Y8	Y9	Y10	Y11	Total
2017/18	3545	580	614	596	673	582	3045
2018/19	3501	557	580	616	598	675	3026
2019/20	3457	585	558	581	617	599	2940
2020/21	3413	570	586	559	582	618	2915
2021/22	3379	566	571	587	560	583	2867
2022/23	3345	606	567	572	588	561	2894
2023/24	3345	599	606	567	572	588	2932



Pupil projections in this area are reducing over the first five years based on the pupils currently in the primary sector and changes in the pattern of admissions. Additional pupil yield has been included in the projections to allow for housing developments in the area.

Table 23: Southport Secondary

Year	Total PAN	Y7	Y8	Y9	Y10	Y11	Total
2017/18	4491	816	776	859	807	808	4066
2018/19	4472	858	817	777	860	808	4120
2019/20	4463	845	860	819	779	862	4165
2020/21	4454	874	847	862	821	781	4185
2021/22	4445	902	875	848	863	822	4310
2022/23	4415	911	903	876	849	864	4403
2023/24	4415	857	912	904	877	850	4400



Pupil projections are increasing over the period while places are reducing due to changes in admission numbers. Additional pupil yield has been included in the projections to allow for housing developments in the area

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EMPTY PLACES & SURPLUS PLACES

Explanatory Note

The following tables provide details of the numbers of empty places and surplus places by school and area. Surplus Places are taken from the DFE School Capacity Survey (SCAP) formerly known as the Surplus Places Return. This return uses May pupil numbers from the School Census return.

In the primary sector, the number of places is determined by multiplying each school's admission number by the number of year groups in the school. Where the number has changed in a particular year the original admission number still applies to the existing year groups until they have worked their way out of the school. The new number applies to all new pupils admitted after that date.

In the secondary sector, the number of places is also determined from the admission number.

The Net Capacity is a measure of the number of places available based upon the teaching accommodation. For academies the capacity is based on the figure shown in their funding agreement.

The number of empty places is the difference between the number of pupils on roll and the number of school places. This can also give an indication of potential overcrowding.

The measurement of surplus places is based upon the Net Capacity which is determined by the sizes of individual teaching areas. If a school's Net Capacity exceeds the number of pupils on roll, the numerical difference is the number of surplus places. No adjustment is made to figures to take account of those schools where the number of pupils on roll exceeds the Net Capacity. **For individual sectors and areas, therefore, the number of surplus places is not the actual difference between the number of pupils on roll and Net Capacity.**

PRIMARY SCHOOLS: EMPTY PLACES & SURPLUS PLACES

School	NOR as at May 2017	No of Places 2016/17	Empty Places		Net Capacity as at May 2017	Surplus Capacity as at May 2017	%
			No	%			
Bootle Primary							
Bedford	400	420	29	6.90	392	0	0.00
Linacre	165	210	39	18.57	210	45	21.43
Netherton Moss	165	240	75	31.25	210	45	21.43
Springwell Park	387	420	33	7.86	420	33	7.86
The Grange	263	210	-35	-16.67	210	0	0.00
Thomas Gray	196	210	14	6.67	210	14	6.67
Christ Church CE	315	345	30	8.70	388	73	18.81
St Oswald's CE	200	210	10	4.76	210	10	4.76
All Saints Catholic	293	390	97	24.87	420	127	30.24
Holy Spirit Catholic	195	210	15	7.14	210	15	7.14
Our Lady of Walsingham Catholic	200	240	40	16.67	210	10	4.76
St Benedict's Catholic	200	210	10	4.76	297	97	32.66
St Monica's Catholic	410	420	10	2.38	420	10	2.38
St Robert Bellarmine Catholic	208	210	2	0.95	210	2	0.95
Community	1576	1710	155	9.06	1652	137	8.29
CE Controlled	315	345	30	8.70	388	73	18.81
CE Aided	200	210	10	4.76	210	10	4.76
Catholic Aided	1506	1680	174	10.36	1767	261	14.77
Total	3597	3945	369	9.35	4017	481	11.97

Litherland Primary							
Hatton Hill	341	420	79	18.81	420	79	18.81
Lander Road	210	210	0	0.00	210	0	0.00
Litherland Moss	155	210	55	26.19	210	55	26.19
St Philip's CE	195	210	15	7.14	210	15	7.14
English Martyr's Catholic	416	420	4	0.95	420	4	0.95
Our Lady Queen of Peace Catholic	121	210	89	42.38	168	47	27.98
Our Lady Star of the Sea Catholic	172	210	38	18.10	184	12	6.52
St Elizabeth's Catholic Primary	358	390	32	8.21	365	7	1.92

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Community	706	840	134	15.95	840	134	15.95
CE Controlled	195	210	15	7.14	210	15	7.14
CE Aided	0	0	0	0.00	0	0	0.00
Catholic Aided	1067	1230	163	13.25	1137	70	6.16
Total	1968	2280	312	13.68	2187	219	10.01
Crosby Primary							
Forefield Junior	364	360	-4	-1.11	360	0	0.00
Forefield Infant	270	270	0	0.00	267	0	0.00
Valewood	207	210	3	1.43	210	3	1.43
Waterloo	380	420	40	9.52	420	40	9.52
St John's CE	181	210	29	13.81	193	12	6.22
St Luke's CE Halsall	209	210	1	0.48	210	0	0.00
St Nicholas CE	211	210	-1	-0.48	210	0	0.00
Rimrose Hope CE	264	315	51	16.19	315	51	16.19
Great Crosby Catholic	658	660	2	0.30	675	0	0.00
St Edmund's & St Thomas's Catholic	309	315	6	1.90	315	0	0.00
St Mary's Catholic	106	105	-1	-0.95	105	0	0.00
St William of York Catholic	206	210	4	1.90	210	4	1.90
Ursuline Catholic	420	420	0	0.00	420	0	0.00
Community	1221	1260	39	3.10	1257	43	3.42
CE Controlled	264	315	51	16.19	315	51	16.19
CE Aided	601	630	29	4.60	613	12	1.96
Catholic Aided	1699	1710	11	0.64	1725	4	0.23
Total	3785	3915	130	3.32	3910	110	2.81
Formby Primary							
Freshfield	222	210	-12	-5.71	210	0	0.00
Redgate	144	210	66	31.43	210	66	31.43
Woodlands	319	315	-4	-1.27	315	0	0.00
St Luke's CE	431	420	-11	-2.62	420	0	0.00
Trinity St Peter's CE	214	210	-4	-1.90	210	0	0.00
Our Lady of Compassion Catholic	237	210	-27	-12.86	210	0	0.00
St Jerome's Catholic	211	210	-1	-0.48	210	0	0.00
Community	685	735	50	6.80	735	66	8.98
CE Controlled	431	420	-11	-2.62	420	0	0.00
CE Aided	214	210	-4	-1.90	210	0	0.00
Catholic Aided	448	420	-28	-6.67	420	0	0.00
Total	1778	1785	7	0.39	1785	66	3.70

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School	NOR as at May 2017	No of Places 2016/17	Empty Places		Net Capacity as at May 2017	Surplus Capacity as at May 2017	%
			No	%			
Maghull Primary							
Aintree Davenhill	403	420	17	4.05	420	17	4.05
Green Park	199	210	11	5.24	208	9	4.33
Hudson	150	210	60	28.57	180	30	16.67
Lydiate	295	335	40	11.94	351	56	15.95
Melling	193	210	17	8.10	210	17	8.10
Northway	285	315	30	9.52	315	30	9.52
Summerhill	201	210	9	4.29	210	9	4.29
St Andrew's CE	328	420	92	21.90	420	92	21.90
St Thomas's CE	210	210	0	0.00	175	0	0.00
Holy Rosary Catholic	418	420	2	0.48	415	0	0.00
St George's Catholic	188	210	22	10.48	210	22	10.48
St Gregory's Catholic	204	210	6	2.86	210	6	2.86
St John Bosco Catholic	200	210	10	4.76	204	4	1.96
Community	1726	1910	184	9.63	1894	168	8.87
CE Controlled	328	420	92	21.90	420	92	21.90
CE Aided	210	210	0	0.00	175	0	0.00
Catholic Aided	1010	1050	40	3.81	1039	32	3.08
Total	3274	3590	316	8.80	3528	292	8.28
Southport Primary							
Birkdale	382	375	-7	-1.87	394	12	3.05
Churchtown	825	840	15	1.79	840	15	1.79
Farnborough Road Junior	481	480	-1	-0.21	480	0	0.00
Farnborough Road Infant	358	360	2	0.56	348	0	0.00
Kew Woods	385	405	20	4.94	411	26	6.33
Kings Meadow	188	174	-14	-8.05	205	0	0.00
Larkfield	293	315	22	6.98	311	0	0.00
Linaker	460	480	20	4.17	503	43	8.55
Marshside	185	210	25	11.90	210	25	11.90
Norwood	439	450	11	2.44	413	0	0.00
Shoreside	205	210	5	2.38	210	0	0.00
Ainsdale CE	214	210	-4	-1.90	207	0	0.00
Bishop David Sheppard CE	204	210	6	2.86	205	1	0.49
Holy Trinity CE	207	210	3	1.43	210	0	0.00
St John's CE	161	210	49	23.33	198	37	18.69
St Philip's CE	207	210	3	1.43	203	0	0.00

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Holy Family Catholic	201	210	9	4.29	209	8	3.83
Our Lady of Lourdes Catholic	541	540	-1	-0.19	515	0	0.00
St Patrick's Catholic	348	350	2	0.57	378	30	7.94
St Teresa's Catholic	82	90	8	8.89	90	8	8.89
Community	4201	4299	98	2.28	4325	121	2.80
CE Controlled	161	210	49	23.33	198	37	18.69
CE Aided	832	840	8	0.95	825	1	0.12
Catholic Aided	1172	1190	18	1.51	1192	46	3.86
Total	6366	6539	173	2.65	6540	205	3.13

Sefton Primary							
Community	10115	10754	660	6.14	10703	669	6.25
CE Controlled	1694	1920	226	11.77	1951	268	13.74
CE Aided	2057	2100	43	2.05	2033	23	1.13
Catholic Aided	6902	7280	378	5.19	7280	413	5.67
Total	20768	22054	1307	5.93	21967	1373	6.25

* For individual sectors and areas the number of surplus places is not the actual difference between the number of pupils on roll and Net Capacity as no adjustment is made to figures to take account of those schools where the number of pupils on roll exceeds the Net Capacity.

SECONDARY SCHOOLS: EMPTY PLACES & SURPLUS PLACES

School	Total NOR as at May 2017	NOR Years 7 to 11	No of places Years 7 to 11 2016/17	Empty places Years 7 to 11		Net Capacity as at May 2017	Surplus Capacity as at May 2017	%
				No	%			
Bootle & Litherland								
Hillside High	725	725	748	23	3.07	970	245	25.26
The Hawthorne's Free School	225	225	600	375	62.50	600	375	62.50
Savio Salesian College	491	491	720	229	31.81	809	318	39.31
Litherland High	683	683	1200	517	43.08	1200	517	43.08
Academy/Free School	1633	1633	2548	915	35.91	2770	1137	41.05
Catholic	491	491	720	229	31.81	809	318	39.31
Total	2124	2124	3268	1144	35.00	3579	1455	40.65
Crosby								
Chesterfield High	1191	1003	1036	33	3.19	1326	135	10.18
St Michael's CE High	644	582	548	-34	-6.20	864	220	25.46
Holy Family Catholic High	830	705	717	12	1.67	898	68	7.57
Sacred Heart Catholic High	1311	1051	1080	29	2.69	1354	0	0.00
Academy	1835	1585	1584	-1	-0.06	2190	355	16.21
Catholic	2141	1756	1797	41	2.28	2252	68	3.02
Total	3976	3341	3381	40	1.18	4442	423	9.52
Formby								
Formby High	1024	821	818	-3	-0.37	989	0	0.00
Range High	1175	934	941	7	0.74	1229	54	4.39
Academy	2199	1755	1759	4	0.23	2218	54	2.43
Maghull								
Deyes High	1387	1156	1180	24	2.03	1426	39	2.73
Maghull High	919	719	1100	381	34.64	1349	430	31.88
Maricourt High	1385	1191	1265	74	5.85	1528	143	9.36
Academy	2306	1875	2280	405	17.76	2775	469	16.90
Catholic	1385	1191	1265	74	5.85	1528	143	9.36

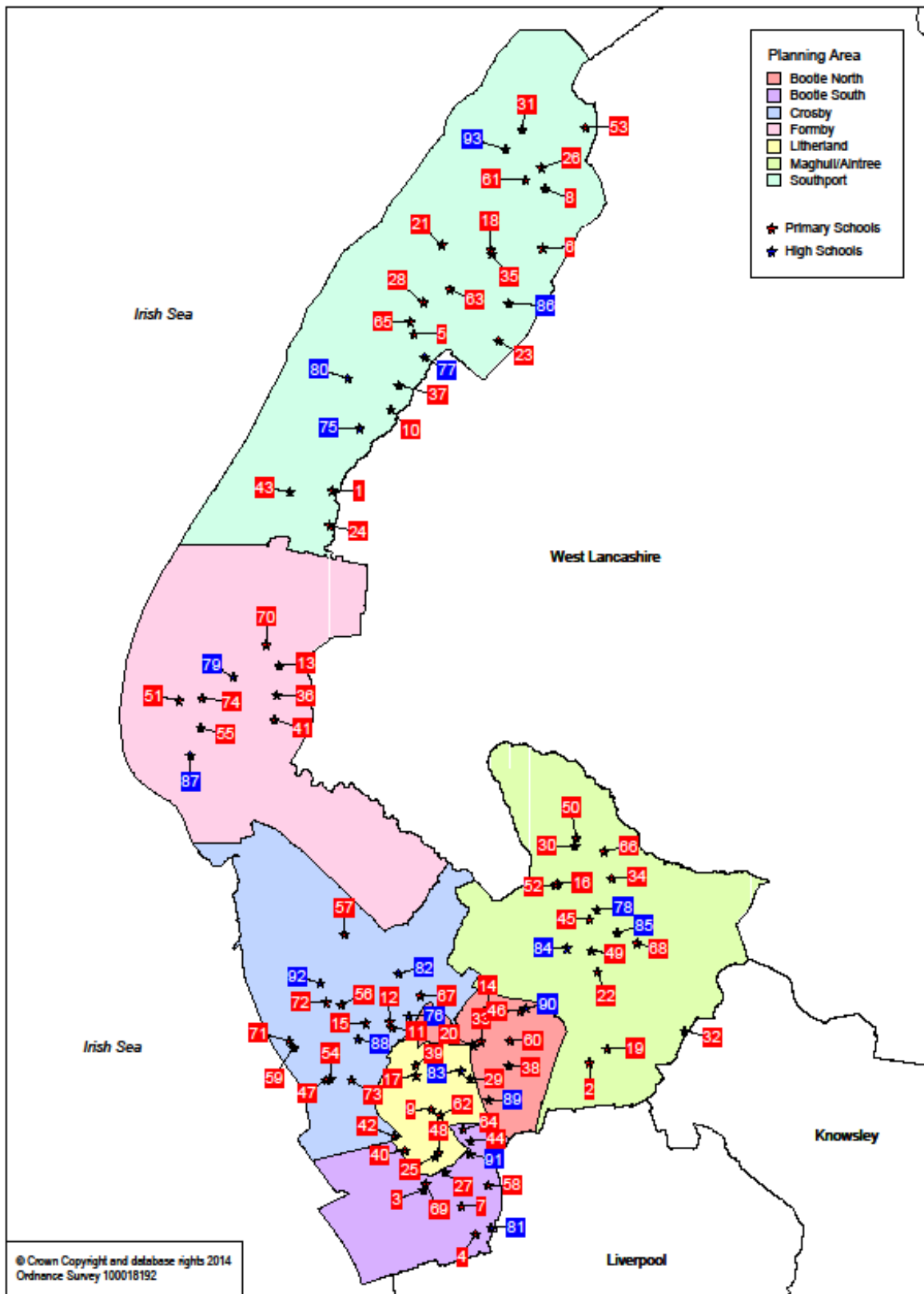
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Total	3691	3066	3545	479	13.51	4303	612	14.22
Southport								
Birkdale High	663	663	960	297	30.94	960	297	30.94
Greenbank High	940	940	1030	90	8.74	1030	90	8.74
Meols Cop High	792	792	777	-15	-1.93	755	0	0.00
Stanley High	669	669	788	119	15.10	753	84	11.16
Christ the King High	1159	1199	940	-259	-27.55	1223	64	5.23
Academy								
Catholic	1159	1199	940	-259	-27.55	1223	64	5.23
Community	1461	1461	1565	104	6.65	1508	84	5.57
Total	4223	4263	4495	232	5.16	4721	535	11.33
Sefton								
Academy	9576	8451	10161	1710	16.83	11943	2402	20.11
Catholic	5176	4637	4722	85	1.80	5812	593	10.20
Community	1461	1461	1565	104	6.65	1508	84	5.57
Total	16213	14549	16448	1899	11.55	19263	3079	15.98

* For individual sectors and areas the number of surplus places is not the actual difference between the number of pupils on roll and Net Capacity as no adjustment is made to figures to take account of those schools where the number of pupils on roll exceeds the Net Capacity.

ANNEX 1: MAP OF SEFTON'S PLANNING AREAS

Map of Sefton's Planning Areas



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Ref No	School
1	Ainsdale St John's CE Primary
2	Aintree Davenhill Primary
3	All Saints Catholic Primary
4	Bedford Primary
5	Birkdale Primary
6	Bishop David Sheppard CE Primary
7	Christ Church CE Primary
8	Churchtown Primary
9	English Martyrs Catholic Primary
10	Farnborough Road Infant and Junior
11	Forefield Infant
12	Forefield Junior
13	Freshfield Primary
14	The Grange Primary
15	Great Crosby Catholic Primary
16	Green Park Primary
17	Hatton Hill Primary
18	Holy Family Catholic Primary
19	Holy Rosary Catholic Primary
20	Holy Spirit Catholic Primary
21	Holy Trinity CE Primary
22	Hudson Primary
23	Kew Woods Primary
24	Kings Meadow Primary
25	Lander Road Primary
26	Larkfield Primary
27	Linacre Primary
28	Linaker Primary
29	Litherland Moss Primary
30	Lydiate Primary
31	Marshside Primary
32	Melling Primary
33	Netherton Moss Primary
34	Northway Primary
35	Norwood Primary
36	Our Lady of Compassion Catholic Primary
37	Our Lady of Lourdes Catholic Primary
38	Our Lady of Walsingham Catholic Primary
39	Our Lady Queen of Peace Catholic Primary
40	Our Lady Star of the Sea Catholic Primary
41	Redgate Primary
42	Rimrose Hope CE Primary
43	Shoreside Primary
44	Springwell Park Primary
45	St Andrew's CE Primary
46	St Benedict's Catholic Primary

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47	St Edmund's and St Thomas Catholic Primary
48	St Elizabeth's Catholic Primary
49	St George's Catholic Primary
50	St Gregory's Catholic Primary
51	St Jerome's Catholic Primary
52	St John Bosco Catholic Primary
53	St John's CE Primary, Crossens
54	St John's CE Primary, Waterloo
55	St Luke's CE Primary
56	St Luke's Halsall CE Primary
57	St Mary's Catholic Primary
58	St Monica's Catholic Primary
59	St Nicholas CE Primary
60	St Oswald's CE Primary
61	St Patrick's Catholic Primary
62	St Philip's CE Primary, Litherland
63	St Philip's CE Primary, Southport
64	St Robert Bellarmine Catholic Primary
65	St Teresa's Catholic Infant
66	St Thomas CE Primary
67	St William of York Catholic Primary
68	Summerhill Primary
69	Thomas Gray Primary
70	Trinity St Peter's CE Primary
71	Ursuline Catholic Primary
72	Valewood Primary
73	Waterloo Primary
74	Woodlands Primary
75	Birkdale High
76	Chesterfield High
77	Christ the King Catholic High
78	Deyes High
79	Formby High
80	Greenbank High
81	Hillside High
82	Holy Family Catholic High
83	Litherland High
84	Maghull High
85	Maricourt Catholic High
86	Meols Cop High
87	Range High
88	Sacred Heart Catholic College
89	Savio Salesian College
90	St Ambrose Barlow Catholic High
91	The Hawthorne's Free School
92	St Michael's CE High
93	Stanley High

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ANNEX 2: SPECIAL EDUCATIONAL NEEDS PLACES IN SEFTON

1. Special Schools in Sefton

School	Type of Special Needs Catered For	Age Range	Number of Places
Crosby High	Moderate learning difficulties	11-16	146
Merefield	Severe learning difficulties & autism	3-19	80
Newfield	Social, Emotional & behavioural difficulties	5-16	81
Presfield	ASD provision	11-19	88
Rowan Park (including Rowan High)	Severe learning difficulties & autism	3-19	146

2. Special Bases in Sefton

Primary School	Type of Base	Number of Places
Freshfield	Moderate learning difficulties	10
Grange	Moderate learning difficulties	3
Grange	Moderate learning difficulties/emotional & behavioural difficulties	8
Grange	Autism	21
Grange	Language Units	24
Hudson	ASD Provision	8
Kings Meadow	Language Unit	10
Our Lady of Lourdes	Autism	24
Rimrose Hope CE	Moderate learning difficulties (more complex needs)	20
Waterloo	ASD Provision	30

3. Secondary Resourced Units in Sefton

Secondary School	Type of Base	Number of Places
Meols Cop High	Asperger's Syndrome/Specific Learning Difficulties	20
St Michael's CE High (Academy)	Asperger's Syndrome/Specific Learning Difficulties	31

ANNEX 3: NURSERY PLACES IN SEFTON SCHOOLS

Bootle & Litherland

Nursery Class or School	Number of Places (FTE)
Bootle	
All Saint's Class	30
Christ Church Class	46
Holy Spirit Class	30
Linacre Class	30
Netherton Moss Class	40
Our Lady of Walsingham Class	30
Springwell Park Class	26
St Benedict's Class	30
St Monica's Class	30
St Oswald's CE Class	30
St Robert Bellarmine Class	30
The Grange Class	30
Thomas Gray Class	54
Cambridge School	40
Greenacre School	61
Total	537
Litherland	
English Martyrs Class	30
Hatton Hill Class	30
Lander Road Class	46
Litherland Moss Class	30
Our Lady Queen of Peace Class	30
Our Lady Star of the Sea Class	15
St Elizabeth's Class	38
Total	219

Crosby

Nursery Class or School	Number of Places (FTE)
Forefield Infant class	34
Great Crosby Class	30
St Luke's Halsall Class	30
St Edmund's & St Thomas'	26
St William of York Class	30
Rimrose Hope Class	30
Sand Dunes School	67
Total	247

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Formby

Nursery Class or School	Number of Places (FTE)
Freshfield Class	30
Redgate class	30
Woodlands Class	26
Our Lady of Compassion Class	30
Trinity St Peter's Class	26
Total	142

Maghull

Nursery Class or School	Number of Places (FTE)
Aintree Davenhill Class	30
Green Park Class	30
Hudson class	46
Lydiate Class	30
Northway Class	30
Holy Rosary Class	26
St George's Class	30
St Gregory's Class	15
Total	237

Southport

Nursery Class or School	Number of Places (FTE)
Birkdale Class	30
Bishop David Sheppard Class	72
Churchtown Class	36
Farnborough Road Class	84
Kew Woods Class	30
Kings Meadow Class	30
Linaker Class	30
Our Lady of Lourdes Class	30
St Teresa's Class	30
Crossens School	53
Total	425

Sefton Schools Forum Report

Date of Meeting:	11 June 2018
Title of Report:	Dedicated Schools Grant (DSG) Outturn 2017/18
Presenting Officer:	Mike McSorley/Kevin McBlain
Reason for Submission to Forum:	(4) ITEM FOR INFORMATION
Executive Summary:	To provide members with the DSG 2017/18 outturn position and level of Schools Balances and Centrally Managed / Retained DSG Reserves.
Budget/Risk Implications:	None
Recommendations:	1. Forum is asked note the 2017/18 outturn position and level of balances carried forward into 2018/19.
Appendices (to be attached)	Analysis of the 2017/18 DSG Individual Schools Budgets (ISB) and Centrally Managed / Retained Schools Budgets (RSB) spending and balances.
Background Papers (available on request)	Year end Revenue outturn 2017/18 Year end Head of Finance statement to DfE Schools Finance Regulations 2017
Report Originator and Contact Details	Name:Kevin McBlain Tele: 01519344049 E-mail: Kevin.mcblain@sefton.gov.uk

<p>SCHOOLS' FORUM POWERS & RESPONSIBILITIES</p> <p>1 ITEMS FOR APPROVAL (DfE can adjudicate where Forum does not agree LA proposal)</p> <p>2 ITEMS FOR CONSULTATION (Forum provides a view on LA proposal but LA decides)</p> <p>3 ITEMS FOR CONSULTATION (Forum provides a view on LA proposal but DfE decides)</p> <p>4 ITEMS FOR INFORMATION (No formal view of the Forum is sought)</p>

1.0 Background

- 1.1 The purpose of this report is to inform members on how the Dedicated Schools Grant was spent in 2017/18, and to indicate the levels of schools balances carried forward into 2018/19. In addition, to report on the Centrally Managed / Retained Schools budgets; High Needs and Early Years spending and year end DSG reserves.

2.0 Outturn 2017/18

- 2.1 Appendix 1 (a) to the report includes an analysis of Individual School Budgets (ISB) compared with outturn, and shows the opening and closing level of schools balances. Appendix 1 (b) includes an analysis of the Centrally Retained (RSB); High Needs and Early Years non schools Budgets and related outturn, along with carried forward DSG reserves.
- 2.2 ISBs represent the resources allocated to maintained schools through the schools formula funding, which is established by the Local Authority, in consultation with schools. RSBs represent resources agreed by Schools to be retained centrally by the Local Authority, to meet the costs of delivering education in settings other than its own maintained schools, as well as providing relevant pupil related support services. Central resources also include for provision of services, which may be delivered more effectively from a collective approach rather than through schools individually.
- 2.3 The allocation of DSG for 2017/18 was based on the three main spending blocks as for 2016/17 i.e Schools; High Needs and Early Years. Schools funding is based around weighted pupil numbers and a smaller range of deprivation factors using the October census data from the previous year (i.e October 2016 for 2017/18 funding). The formula excludes Special schools, which are covered by High Needs place funding allocations.
- 2.4 High Needs funding covers DSG for children with Special Education Needs and includes for place funding and additional top up funding as required for Pre16 pupils across mainstream Primary; Secondary and Special phases, including 2 Pupil Referral Units; and for Post 16 provision, funding to enable the Local Authority to pay top up costs only, with the EFA funding post 16 provision in schools and colleges directly. High Needs Funding also includes for payments to External and non-maintained schools funded by the Local Authority (for example independent special schools).
- 2.5 Early Years funding covers the provision of 3-4 year old entitlement to universal 15 hours per week free nursery education for all parents, and from September 2017, up to an additional 15 hours per week childcare for eligible parents in employment. In addition, it covers nursery provision for eligible 2 year olds in maintained nursery schools; nursery classes in Primary schools; and private, voluntary or independent nurseries, based on parental income.

- 2.6 Each year, the Local Authority has a statutory requirement to meet the Minimum Funding Guarantee (MFG) for schools. This states the minimum percentage by which individual schools budgets must increase or maximum decrease from the previous year, subject to pupil number changes. In 2017/18, the MFG was set at minus -1.5%.

3.0 DSG Individual Schools Balances 2017/18

- 3.1 Appendix 1(a) shows the 2017/18 ISB schools budget, expenditure and spending variations, along with the value of the opening and closing schools balances. Note that Maintained mainstream schools receive funding from the main Schools Block. The Central support service allocations are either funded specifically through de-delegated funding, taken out of the maintained schools funding; or for other Central provision items, funding is taken from all schools allocations, including Academies, from the total schools block funding.
- 3.2 High Needs and Early Years funding Blocks are separate DSG funding streams and include the funding of Maintained Special Schools and High Needs spending services and for provision of early years services including Maintained nurseries; Nursery classes within schools and PVI's to deliver 2-4 year old childcare.
- 3.3 During 2017/18, Maintained schools balances increased by a net £0.781m moving from an opening balance of £13.478m to a closing balance of £14.259m at 31 March 2018 (See Appendix 3 for full analysis). The closing balance includes a deficit of £0.742m in respect of the South Sefton Sixth Form College. This is to be written off against the Council's resources following the transfer of the College to Hugh Baird from 1 December 2017. Taking this write-off into account, closing schools balances increase to a figure of £15m. Closer analysis of the schools balances reveals the following:

	<u>Increase in balances year on year</u>	<u>Decrease in balances year on year</u>	<u>Net changes in balances year on year</u>	<u>Schools with deficit balances at 31.3.18</u>
	<u>£000m</u>	<u>£000m</u>	<u>£000m</u>	<u>£000m</u>
55 Primary Schools	£2.236m	£0	£2.236m	
20 Primary Schools	£0	£-0.482m	£-0.482m	
2 Secondary Schools	£0.156m	£0	£0.156m	
6 Secondary Schools (Incl SSSFC)	£0	£-1.475m	£-1.475m	
6 Special/AP Schools	£0.537m	£0	£0.537m	
1 Special/AP Schools	£0	£-0.042M	£-0.042m	

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1	Nursery School	£0.046m	£0	£0.046m	
3	Nursery Schools	£0	£-0.195m	£-0.195m	
95	Net movements in balances before SSSFC Deficit write-off (£0.742m)	£2.975m (64)	£-2.194m (31)	£0.781m (95)	
	<u>Incl in the above analysis</u>				
3	Secondary Schools (Incl SSSFC - See note below)				£1.642m
1	Nursery School				£0.137m
	Deficit Balances carried forward				£1.779m

- 3.4 In the year, 64 Schools, including special schools and maintained nurseries, had increased balances during 2017/18; whilst 30 schools saw balances decrease. 2 Schools have a licensed deficit balance to carry forward, and South Sefton Sixth Form College, which as mentioned above, is now under the control of High Baird College, and has had its deficit written off in 2017/18.
- 3.5 Members should also note that the schools balances relate only to Sefton's maintained schools. Academies maintain their own balances and are directly accountable to the DfE on an academic year basis. Individual maintained schools balances are attached at Appendix 3 for information. This information has been supplied to schools on an individual basis in May 2018.
- 3.6 Schools will be requested to provide details of how they intend to use their balances going forward, in particular, where they exceed Schools Forum agreed limits of 12% of a Primary school's DSG allocation and 8% of a Secondary/Special school's allocation. This process of accountability was reviewed during 2015 by consultation with SAPH and SASH and it was decided by a majority of Schools Forum members that this process should continue.

4.0 DSG Centrally Retained Reserves

- 4.1 Appendix 1(b) shows the analysis of DSG Centrally / Managed Retained balances, which are kept as earmarked reserves by the Local Authority to support future

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spending on specific spending block related issues in conjunction with the agreement of Schools Forum or, as necessary, by the Local Authority in support of budget pressures.

- 4.2 During 2017/18, the Centrally Managed DSG Budgets have overspent spent by a net £1.695mm (over spend £1.861m in 16/17). This is analysed below with main variations across each central funding block.

ITEM	£m
	<u>(-) Under spend / + Over spend</u>
<u>Early Years related</u>	
2 Year Old Offer	-0.049
3-4 Year old universal free entitlement and additional hours	0.336
Early Years Pupil Premium	-0.041
Disability Access Fund	0.015
Transitional funding – formula equalisation	-0.208
Early Years Inclusion Funding	-0.054
General admin support under spending	-0.026
<u>Items identified as committed against EY Reserves in 17/18</u>	
2 Year old place support funding for ineligible children	0.046
EY Training Post funding for 9 months	0.033
Redundancy support costs	0.032
Training initiatives	0.006
Net Over-spend on Early Years 2017/18	0.090
<u>Schools de-delegated items & Centrally related</u>	
Primary Schools Class Size Growth Fund overspend	0.011
Trade Union Facility Time / Public Duties Schools Support under-spend in 2017/18 (Actual take up)	-0.113
Ethnic minority achievement under spending in 2017/18	-0.065
Combined budgets under spend – closed schools mothballing / maintenance costs, grounds maintenance and PDC expenditure	-0.057
Net Under-spend on Schools de-delegated items & Centrally related Budgets 2017/2018	-0.224

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<u>High Needs related</u>	
Early Years Inclusion payment to PVI's for complex needs children – over subscribed	0.109
Primary Resourced Unit Places	-0.198
Primary Top Ups in Mainstream schools & Resourced Units overspend & Out of area top ups	0.360
Secondary Top Ups in Mainstream schools & Resourced Units overspend	0.277
Special School additional unit places	0.151
Special School Top ups including Post 16	0.927
Non Maintained Special School expenditure net of Health contributions	0.122
Professional services bought in	0.107
Other net variations	-0.026
Net Over-spend on High Needs Centrally Retained Budgets	1.829
Total Net Over-spending across DSG centrally managed budgets 2017/18	1.695

Early Years Block

- 4.3 Early Years provision overspent by £0.090m in 2017/18. This year was the first year using a formulaic approach to the national distribution of funding to Local Authorities for 3-4 year old childcare provision. Sefton was paid a rate of £4.30 per hour for the 3-4 year old universal and extra hours provision; and £5.22 per hour for 2 year old provision. This is before allocations to providers locally. Local distribution included a universal Base Rate for 3-4 year olds of £4 per hour and £4.90 per hour for 2 Year olds. The remainder of the funding was allocated to deprivation; support costs; transitional funding towards training; and SEND Inclusion. Separate allocation was made for Early Years Pupil Premium; Disability Access Funding and Maintained Nursery transitional funding.
- 4.4 The numbers of working parents taking up of the additional 15 hours 3-4 year old provision has been higher than DfE 's own estimates starting in September 2017 and the funding received has created a shortfall in funding of £0.336m.
- 4.5 This was offset by underspending on the 2 year old offer and other areas of the 3-4 year old provision including the transitional funding set aside for training; Early Years pupil Premium; Early Years inclusion funding; and administrative support costs of £-0.366m

- 4.6 A number of other Early Years spending initiatives incurred cost of £0.117m. These costs were already earmarked against Early Years reserves, and are separately identified in the table above.

Central School Services Block

- 4.7 The Central Schools Services block of services, consists of a number of de-delegated items agreed with maintained schools and centrally retained services, which are funded from a top-slice of the schools block allocation for services which are considered better managed corporately.
- 4.8 Overall, these items under spent by £-0.224m. A quick analysis includes under spending on Trade Union Facility Time / Public Duties support (£-0.113m); Ethnic Minority Achievement (£-0.065m); and combined budgets including the PDC and Grounds maintenance / mothballing and R&M costs of closed schools (£-0.049m). Primary infant class growth over spent by £0.011m, whilst support to schools causing concern spent to budget.
- 4.9 The surplus balance on central services will be carried forward into 2018/19 and its use considered during the year. A further report will be brought to the Schools Forum in the Autumn term if additional support is required in 2018/19 to support additional cost pressures against these budget areas.

High Needs Block

- 4.10 High Needs was forecast to overspend in 2017/18 by as much as £1.9m and ended slightly below this as £1.829m.
- 4.11 This overspend has required the full use of the High Needs DSG reserves brought forward from 2016/17 (£0.464m) and a further (£1.365m) taken from the Early Years reserves to balance.
- 4.12 The overspend is analysed in the table above, but in summary, consists of £1.626m Top up funding related additional costs; £0.122m Non maintained school places; Professional Fees bought in £0.107m; and a small net under spending across other High Needs areas of £-0.026m.
- 4.13 High Needs is currently under review but it expected that there will be an over spending in 2018/19 of around £2m unless any mitigating reductions in cost can be found over the coming months.
- 4.14 In summary, DSG Central reserves started the year with £2.210m and after the net over spending of £1.695m, end the year with £0.515m. An analysis of the Central DSG reserves is shown in appendix 1b below. Detailed schools balances are attached as appendix 2.

5.0 Future Commitments against Reserves

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- 5.1. The centrally managed DSG reserves at the end of 2017/18 are greatly reduced due to the significant overspend on the High Needs, as forecast in the year.
- 5.2. The Early Years reserves of £0.291m are almost fully committed in 2019/20 across three main areas of expenditure :
 - 2 YO support to PVI's to help place children with Disabilities who fall outside of eligibility criteria for free 2YO nursery entitlement (£0.104m)
 - Support to the Maintained Nursery schools towards a business case (£0.040m)
 - Committed spending against training for providers (balance of unused funding from 17/18) (£0.063m).

After these committed values, this leaves only £0.084m uncommitted in 2018/19 unless Forum agrees to change any of the commitments above.

- 5.3. With a forecast overspend of £2m on High Needs in 2018/19 it is likely that a significant deficit will need to be carried over into 2019/20. This cannot be found from Council balances and remains within the DSG, with first call on funding of it from the next year's funding, unless spending can be reduced significantly during 2018/19.
- 5.4. Pressures will no doubt be placed on the Central schools service reserve, as the number of schools causing concern will continue to grow and extra support will be required for those schools having very low balances, to help meet costs of redundancy.
- 5.5. With respect to Early Years, the shortfall on 2017/18 funding for the additional 15 hours provision for 3-4 year olds should be made partly good, with the expectation of extra funding from the DfE, if we take the fact, there was an increase in the numbers counted in the January 2018 census compared to the initial estimated numbers funded by the DfE in 2017/18. The extent of any extra funding will however, only be known in July 2018, when the DfE announce its mid year funding changes based on the headcount data.

6.0 Recommendations

- 6.1 Taking the above commitments into account against the 2018/19 opening balances, there should be available, net uncommitted resources, of around £-0.308m in 2018/19. Appendix 2 shows an analysis of the uncommitted DSG reserves for information.
- 6.2 The closing balance of all Centrally managed DSG reserves as a percentage of total 2017/18 DSG funding (both ISB & RSB and incl 6th Form Grant and PPG) represents around 0.26% (1.05% 2016/17)
- 6.3 Members are asked to note the outturn report for 2017/18 and levels of balances carried forward to 2018/19.

APPENDIX 1 (a)

(a) ANALYSIS OF DEDICATED SCHOOLS OUTTURN 2017/18 FOR INDIVIDUAL SCHOOLS BUDGETS AND (b) FOR CENTRALLY MANAGED / RETAINED SCHOOLS BUDGETS

INDIVIDUAL SCHOOLS BUDGETS

<u>Opening Schools Balances – Surplus (-) / Deficit 1.4.2017</u>	<u>SCHOOLS</u>	<u>Schools DSG - Individual Schools Budgets 2017/18</u>	<u>Outturn Net Expenditure – Individual Schools Budgets 2017/18</u>	<u>Outturn Variations – Under spend (-) / Overspend 2017/18</u>	<u>Closing Schools Balances 31.3.2018</u>
<u>£'s</u>		<u>£'s</u>	<u>£'s</u>	<u>£'s</u>	<u>£'s</u>
(-341,119)	Nursery	1,203,063	1,351,909	148,846	(-192,273)
(-9,942,957)	Primary	97,604,252	95,851,186	(-1,753,066)	(-11,696,023)
(-1,586,642)	Secondary	29,581,195	30,899,536	1,318,341	(-268,301)
(-1,597,197)	Special (incl. PRUs)	14,604,285	14,109,197	(-495,088)	(-2,092,285)
0	Academies	45,447,403	45,447,403	0	0
0	EFA 6 th Form Funding (Excl SEN Post 16)	4,837,938	4,837,938	0	0
(-13,477,915)	ISB DSG Funding	193,278,136	192,497,169	(-780,967)	(-14,258,882)
	<u>Extract from above figs</u>				
(-280,054)	Written down final deficit on South Sefton Sixth Form College against Council resources	(-1,192,527)	(-1,654,901)	(-562,374)	(-742,428)
(-13,757,969)	ISB Outturn 2017/18 & adjusted Schools Balances	192,085,609	190,842,268	(-1,243,341)	(-15,001,310)

APPENDIX 1 (b)

CENTRALLY MANAGED DSG EXTERNAL AND SUPPORT BUDGETS & DSG RESERVES

	<u>BUDGET AREAS</u>	<u>DSG - Retained Schools Budgets 2017/18</u>	<u>Outturn Net Expenditure - Retained Schools Budgets 2017/18</u>	<u>Outturn Variations - Under spend (-) / Overspend 2017/18</u>	
		<u>£'s</u>	<u>£'s</u>	<u>£'s</u>	
	Early Years	14,987,815	15,078,033	90,218	
	High Needs	26,711,964	28,540,666	1,828,702	
	*Schools de-delegated items & Centrally related Budgets 2017/2018- incl growth in class size (£150k) and Schools facing financial difficulties support (£178k) contingencies etc	1,835,814	1,611,730	(-224,084)	
		43,535,593	45,230,426	1,694,836	
	DSG Funding	(-43,535,593)	(-43,535,593)	0	
	<u>Net over spend 2017/18 on Centrally Managed DSG Budgets</u>	0	1,694,836	1,694,836	
	*Centrally retained figs grossed up for school licence costs, which are paid nationally by the DfE from a top-slice of schools budget allocations. Outturn figs are net of reclaimable VAT on licences.				

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<u>Opening DSG Retained Balances 1.4.2017</u>	<u>SUMMARY OF CENTRALLY MANAGED / RETAINED DSG RESERVES</u>	<u>Application of Reserve in 2017/18 (within Schools DSG analysis)</u>	<u>Contribution to Reserve in 2017/18 (See Centrally Managed / Retained analysis)</u>	<u>Net Movement in Reserves 2017/18</u>	<u>Closing DSG Retained Balances 31.3.2018</u>
<u>£'s</u>					<u>£'s</u>
(-1,745,865)	Early Years reserve	1,474,709	(-20,000)	1,454,709	(-291,156)
(-464,211)	High Needs reserve	464,211	0	464,211	0
0	Schools de-delegated items & Centrally related reserve	0	(-224,084)	(-224,084)	(-224,084)
(-2,210,076)	DSG Reserves @ 31.3.18	1,938,920	(-244,084)	1,694,836	(-515,240)

ANALYSIS OF DSG UNCOMMITTED RESERVES 2018/19 - APPENDIX 2

	<u>EARLY YEARS</u>	<u>SCHOOLS</u>	<u>HIGH NEEDS</u>	<u>TOTALS</u>
	<u>£</u>	<u>£</u>	<u>£</u>	<u>£</u>
Opening balance 1.4.2018	(-291,156)	(-224,084)	0	(-515,240)
<u>Committed use of reserves in 18/19:</u>				
2 YO support to PVI's to help place children with Disabilities who fall outside of eligibility criteria for free 2YO nursery entitlement	104,000			104,000
Committed spending against training for providers (balance of unused funding from 17/18)	63,000			63,000
Support to Maintained Nursery Schools towards a Business Case	40,000			40,000
Uncommitted DSG Reserves	(-84,156)	(-224,084)	0	(-308,240)

**Note that the LEA can decide how these centrally managed DSG reserves are deployed, subject to budget pressures across the spending blocks.

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School Balances 2017/18

APPENDIX 3

PRIMARY SCHOOLS

School	Funding 2017/18 £	School Expenditure 2017/18	Variance £	2016/17 (U/Spends) O/Spends Bals B/Fwd	2017/18 (U/Spends) O/Spends In Year Net	Cumulative (Underspend) O/Spends To March 2018
Linacre	941,095	908,183	(32,911)	(29,822)	(32,911)	(62,733)
Netherton Moss	1,037,722	1,089,979	52,257	(217,472)	52,257	(165,214)
The Grange	2,098,450	2,013,850	(84,601)	(284,627)	(84,601)	(369,228)
Birkdale	1,717,558	1,686,604	(30,955)	(38,798)	(30,955)	(69,752)
Churchtown	3,438,607	3,420,315	(18,292)	(343,302)	(18,292)	(361,594)
Farnborough Road Jnrs	1,908,487	1,868,638	(39,848)	(137,230)	(39,848)	(177,078)
Farnborough Road Infs	1,699,200	1,592,118	(107,082)	(107,771)	(107,082)	(214,853)
Linaker	2,215,038	2,090,343	(124,695)	(195,148)	(124,695)	(319,843)
Norwood	1,801,010	1,848,877	47,867	(58,635)	47,867	(10,768)
Marshside	820,187	767,230	(52,957)	(75,669)	(52,957)	(128,626)
Kew Woods	1,754,841	1,750,328	(4,513)	(63,140)	(4,513)	(67,653)
Davenhill	1,706,059	1,660,039	(46,020)	(245,790)	(46,020)	(291,810)
Hudson	1,053,688	1,013,548	(40,140)	(4,158)	(40,140)	(44,297)
Waterloo	2,184,786	2,210,238	25,453	(76,815)	25,453	(51,362)
Forefield Juniors	1,472,506	1,447,815	(24,691)	(300,752)	(24,691)	(325,443)
Forefield Infants	1,223,267	1,210,738	(12,529)	(144,473)	(12,529)	(157,002)
Lander Road	1,175,907	1,177,625	1,719	(166,201)	1,719	(164,482)
Litherland Moss	1,004,732	970,521	(34,210)	(181,018)	(34,210)	(215,228)
Hatton Hill	1,828,296	1,775,460	(52,836)	(254,660)	(52,836)	(307,496)
Northway	1,268,940	1,251,212	(17,728)	(197,618)	(17,728)	(215,346)
Woodlands	1,234,043	1,229,093	(4,950)	(153,565)	(4,950)	(158,515)
Summerhill	858,394	878,639	20,245	(133,129)	20,245	(112,885)
Freshfield	1,182,651	1,168,031	(14,620)	(115,036)	(14,620)	(129,656)
Green Park	934,987	929,603	(5,383)	(49,854)	(5,383)	(55,237)
Redgate	726,703	730,950	4,247	(71,863)	4,247	(67,616)
Kings Meadow	1,057,779	989,592	(68,187)	(152,554)	(68,187)	(220,741)
Larkfield	1,214,233	1,228,490	14,257	(106,509)	14,257	(92,252)
Shoreside	871,196	845,374	(25,821)	(102,946)	(25,821)	(128,768)
Melling	832,617	820,126	(12,491)	(101,331)	(12,491)	(113,823)
Valewood	917,466	900,970	(16,496)	(104,024)	(16,496)	(120,520)
Lydiate	1,255,695	1,186,705	(68,990)	(168,446)	(68,990)	(237,437)
Bedford	2,108,382	2,013,533	(94,848)	(259,833)	(94,848)	(354,681)
Christ Church	1,806,109	1,760,773	(45,337)	(156,106)	(45,337)	(201,442)
St John's, Crossens	724,473	795,346	70,872	(119,610)	70,872	(48,738)
St Andrew's	1,249,847	1,256,253	6,407	(51,291)	6,407	(44,884)
St Luke's,Formby	1,610,273	1,557,454	(52,819)	(115,484)	(52,819)	(168,303)
St Philip's, Litherland	852,351	830,201	(22,150)	(95,457)	(22,150)	(117,607)
St Oswald's	1,063,942	1,066,286	2,344	(96,842)	2,344	(94,499)
Holy Trinity	866,505	836,915	(29,590)	(80,759)	(29,590)	(110,349)
St Philip's, Southport	878,637	844,443	(34,193)	(40,429)	(34,193)	(74,623)
Ainsdale	914,577	877,667	(36,911)	(102,003)	(36,911)	(138,914)
St Monica's	1,890,370	1,809,791	(80,579)	(270,802)	(80,579)	(351,381)
St Robert Bellarmine	1,002,265	978,340	(23,925)	(117,421)	(23,925)	(141,346)
Holy Spirit	1,116,568	1,150,021	33,453	(67,671)	33,453	(34,219)
Holy Family	912,628	916,977	4,349	(186,225)	4,349	(181,876)
Our Lady of Lourdes	2,568,300	2,544,087	(24,213)	(303,653)	(24,213)	(327,867)
St Teresa's	504,614	466,487	(38,126)	(72,548)	(38,126)	(110,675)
St Patrick's	1,382,943	1,394,047	11,104	(39,788)	11,104	(28,684)
St Thomas'	485,088	536,015	50,927	(50,907)	50,927	20
St John's, Waterloo	826,780	795,132	(31,648)	(112,526)	(31,648)	(144,174)
St Luke's Halsall	991,710	969,420	(22,290)	(88,004)	(22,290)	(110,294)
St Nicholas'	874,516	867,673	(6,843)	(123,937)	(6,843)	(130,780)
St George's	861,249	787,358	(73,891)	(2,270)	(73,891)	(76,161)
Great Crosby	2,533,520	2,389,241	(144,278)	(170,090)	(144,278)	(314,368)
St Mary's	485,526	462,387	(23,139)	(62,987)	(23,139)	(86,126)
St Edmunds & St Thom	1,340,773	1,316,051	(24,722)	(118,366)	(24,722)	(143,088)
Our Lady Star of the S	1,098,286	1,057,513	(40,773)	(52,131)	(40,773)	(92,905)
Our Lady of Comp	1,012,906	986,554	(26,352)	(197,319)	(26,352)	(223,671)
English Martyrs	1,830,269	1,807,396	(22,873)	(231,182)	(22,873)	(254,055)
St Elizabeth's	1,879,607	1,815,706	(63,901)	(167,607)	(63,901)	(231,508)
St William of York	1,078,014	1,051,008	(27,006)	(81,326)	(27,006)	(108,331)
Our Lady Queen of P	713,019	717,302	4,283	(173,637)	4,283	(169,353)
St Gregory's	923,166	944,816	21,650	(208,614)	21,650	(186,964)
Ursuline	1,635,512	1,653,072	17,560	(185,824)	17,560	(168,264)
St Jerome's	839,153	848,767	9,614	(18,619)	9,614	(9,005)
Holy Rosary	1,700,051	1,713,292	13,241	(304,285)	13,241	(291,043)
St John Bosco	799,103	780,640	(18,463)	(92,026)	(18,463)	(110,489)
Bishop David Sheppard	1,207,422	1,141,180	(66,242)	(22,356)	(66,242)	(88,598)
Springwell Park	2,085,526	1,966,901	(118,624)	(275,560)	(118,624)	(394,184)
Thomas Gray	1,237,537	1,250,227	12,690	(15,109)	12,690	(2,419)
Trinity St Peters	948,758	920,276	(28,482)	(80,547)	(28,482)	(109,029)
St Benedict's	1,049,709	1,016,506	(33,203)	(34,561)	(33,203)	(67,763)
Our Lady of Wals	1,086,838	1,047,716	(39,122)	(67,359)	(39,122)	(106,481)
All Saints	1,570,037	1,607,074	37,037	(266,904)	37,037	(229,868)
Rimrose Hope	1,621,258	1,642,104	20,847	(190,629)	20,847	(169,783)
TOTAL PRIMARY	97,604,256	95,851,186	(1,753,071)	(9,952,958)	(1,753,071)	(11,706,029)

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SECONDARY SCHOOLS

School	Funding 2017/18 £	School Expenditure 2017/18	Variance £	2016/17 (U/Spends) O/Spends Bals B/Fwd	2017/18 (U/Spends) O/Spends In Year Net	Cumulative (Underspend) O/Spends To March 2018
Stanley High	1,543,337	1,936,316	392,979	(391,292)	392,979	1,688
Meols Cop High	4,715,579	4,886,264	170,684	(885,118)	170,684	(714,433)
Savio High	3,129,139	3,365,878	236,739	94,579	236,739	331,318
Maricourt High	7,012,198	6,900,292	(111,906)	(543,981)	(111,906)	(655,886)
Sacred Heart High	6,377,624	6,491,085	113,461	(428,486)	113,461	(315,025)
Holy Family High	4,523,057	4,478,784	(44,273)	612,387	(44,273)	568,114
Christ The King High	5,925,673	6,023,954	98,281	(324,786)	98,281	(226,505)
South Sefton SFC	1,192,527	1,654,901	462,374	280,054	462,374	742,429
TOTAL SECONDARY	34,419,134	35,737,474	1,318,340	(1,586,642)	1,318,340	(268,302)

SPECIAL SCHOOLS

School	Funding 2017/18 £	School Expenditure 2017/18	Variance £	2016/17 (U/Spends) O/Spends Bals B/Fwd	2017/18 (U/Spends) O/Spends In Year Net	Cumulative (Underspend) O/Spends To March 2018
Presfield	2,053,583	1,902,371	(151,212)	(515,275)	(151,212)	(666,488)
Merefield	2,346,138	2,272,911	(73,227)	(207,273)	(73,227)	(280,500)
Crosby High	2,152,938	2,015,120	(137,817)	(198,953)	(137,817)	(336,770)
Newfield	1,660,739	1,600,372	(60,367)	(290,820)	(60,367)	(351,186)
Rowan Park	3,655,176	3,697,400	42,224	(252,308)	42,224	(210,084)
TOTAL SPECIAL	11,868,574	11,488,175	(380,399)	(1,464,629)	(380,399)	(1,845,028)

NURSERY SCHOOLS

School	Funding 2017/18 £	School Expenditure 2017/18	Variance £	2016/17 (U/Spends) O/Spends Bals B/Fwd	2017/18 (U/Spends) O/Spends In Year Net	Cumulative (Underspend) O/Spends To March 2018
Crossens	318,298	337,417	19,119	(126,092)	19,119	(106,973)
Sand Dunes	239,341	403,508	164,167	(27,660)	164,167	136,507
Cambridge	348,775	302,513	(46,263)	(155,585)	(46,263)	(201,848)
Greenacre	296,649	308,471	11,822	(31,783)	11,822	(19,960)
TOTAL NURSERY	1,203,063	1,351,909	148,846	(341,120)	148,846	(192,273)

PRU'S

School	Funding 2017/18 £	School Expenditure 2017/18	Variance £	2016/17 (U/Spends) O/Spends Bals B/Fwd	2017/18 (U/Spends) O/Spends In Year Net	Cumulative (Underspend) O/Spends To March 2018
Impact Secondary Pru	2,286,190	2,193,788	(92,402)	(47,229)	(92,402)	(139,631)
Jigsaw Primary Pru	449,520	427,234	(22,286)	(85,339)	(22,286)	(107,625)
TOTAL PRU'S	2,735,710	2,621,022	(114,688)	(132,568)	(114,688)	(247,256)

Summary	Funding 2017/18 £	School Expenditure 2017/18	Variance £	2016/17 (U/Spends) O/Spends Bals B/Fwd	2017/18 (U/Spends) O/Spends In Year Net	Cumulative (Underspend) O/Spends To March 2018
Total Primary	97,604,256	95,851,186	(1,753,071)	(9,952,958)	(1,753,071)	(11,706,029)
Total Secondary	34,419,134	35,737,474	1,318,340	(1,586,642)	1,318,340	(268,302)
Total Special	11,868,574	11,488,175	(380,399)	(1,464,629)	(380,399)	(1,845,028)
Total Nursery	1,203,063	1,351,909	148,846	(341,120)	148,846	(192,273)
Total Pru	2,735,710	2,621,022	(114,688)	(132,568)	(114,688)	(247,256)
Total All Schools	147,830,737	147,049,766	(780,971)	(13,477,916)	(780,971)	(14,258,887)

Sefton Schools Forum Report

Date of Meeting:	11 June 2018
Title of Report:	Increase in Primary PRU charges
Presenting Officer:	Erika Rothlisberger
Reason for Submission to Forum:	For information
Executive Summary:	To inform Forum of the increase in charges for Jigsaw
Budget/Risk Implications:	Increase on primary school budgets
Recommendations:	To approve the contents of the report
Appendices (to be attached)	none
Background Papers (available on request)	
Report Originator and Contact Details	Erika Rothlisberger Jigsaw 0151 934 3120

SCHOOLS' FORUM POWERS & RESPONSIBILITIES	
1	ITEMS FOR APPROVAL (DfE can adjudicate where Forum does not agree LA proposal)
2	ITEMS FOR CONSULTATION (Forum provides a view on LA proposal but LA decides)
3	ITEMS FOR CONSULTATION (Forum provides a view on LA proposal but DfE decides)
4	ITEMS FOR INFORMATION (No formal view of the Forum is sought)

1. **Background**

- 1.1 Since Jigsaw first started charging schools for places, we have not increased costs.

We currently receive £10k per full time place, which schools top up with each referral by £70 per day.

Transport costs are significant and had been much underestimated at set up. In addition as any other service, we have experienced increases across the board.

We not only need to be able to balance the books, but be able to offer the service that was originally anticipated. We wish to deliver appropriate and timely support to the very vulnerable pupils we support, which would include therapeutic input.

In light of the above, Jigsaw will be increasing the cost of a top up place to schools from £70 per day to £90 per day. This increase will come into effect from September 2018.

Sefton Schools Forum Report

Date of Meeting:	11 June 2018
Title of Report:	Special Educational Needs and Disability Inquiry
Presenting Officer:	Mike McSorley
Reason for Submission to Forum:	For information
Executive Summary:	To inform Forum of the Special Educational Needs and Disability Inquiry
Budget/Risk Implications:	None
Recommendations:	To approve the contents of the report
Appendices (to be attached)	none
Background Papers (available on request)	None
Report Originator and Contact Details	Mike McSorley 0151 934 3428

SCHOOLS' FORUM POWERS & RESPONSIBILITIES	
1	ITEMS FOR APPROVAL (DfE can adjudicate where Forum does not agree LA proposal)
2	ITEMS FOR CONSULTATION (Forum provides a view on LA proposal but LA decides)
3	ITEMS FOR CONSULTATION (Forum provides a view on LA proposal but DfE decides)
4	ITEMS FOR INFORMATION (No formal view of the Forum is sought)

1. **Background**

- 1.1 The House of Commons Education Committee has launched an inquiry into support for children and young people with SEND that is intended to review the success of the SEND reforms, how they have been implemented, and what people with impact they are having in meeting the challenges faced by children and young special educational needs and disabilities

:Terms of Reference - Call for written evidence on the following

Assessment of and support for children and young people with SEND •

The transition from statements of special educational needs and Learning Disability Assessments to Education, Health and Care Plans •

The level and distribution of funding for SEND provision •

The roles of and co-operation between education, health and social care sectors •

Provision for 19-25-year olds including support for independent living; transition to adult services; and access to education, apprenticeships and work •

Thursday 14 June 2018: Closing date for written submissions

[Send a written submission to the Special educational needs and disability inquiry](#) •

<https://www.parliament.uk/business/committees/committees-a-z/commons-select/education-committee/news-parliament-2017/special-educational-needs-and-disability-launch-17-19/>