



MEETING: SCHOOLS FORUM

DATE: Monday 19 November 2018

TIME: 1.30 pm

VENUE: Formby Professional Development Centre, Park Road, Formby

Member

Dorothy Lee Ogden (Chair)
Simon Penney
Ian Raikes
Sharon Cowey
Sue Kerwin
Niki Craddock
Anna James
Bernie Coxon,
Malcolm Parry,
Mary Wall
Cllr Richard Hands
Isobel Macdonald Davies
Cathy Earley
Paul Tomlinson
Matt Symes (Chair of SASH)
David Jones
Toni Oxton-Grant
Brenda Porter
Nigel Bellamy
Danny MacAreavy
Wendy Corless
Brenda Hayes/Tim Short
Jon Horrocks
Nicola Walsh
Mary Johnson (FS)
Mike McSorley (HOS)
Kevin McBlain(FS)

Representatives

Academy Governor
Academy Headteacher
Academy Headteacher
Primary Headteacher
Primary Headteachers
Primary Headteacher
Primary Headteacher
Primary Governor
Primary Governor
Primary Governor
Primary Governor
Primary Governor
Primary Governor
Nursery Headteachers
PVI
Secondary Headteacher
Secondary Headteacher
Special Headteacher
Special Governors Rep
HWB (Early Life Group)
Faith
PRU
UNION (Teaching)
UNION (Non-Teaching Union)
Virtual Head/LAC
Local Authority
Local Authority
Local Authority

Colette Jones
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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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A G E N D A

1. **Apologies for Absence**
2. **Agenda Item 2 Schools Forum minutes 24.09.18** (Pages 5 - 8)
3. **Matters Arising**
4. **Agenda Item 4 Ofsted Education Inspection Framework** (Pages 9 - 58)
5. **SEN Review Update**
6. **Agenda Item 6 Early Years Report on Forecast Spending** (Pages 59 - 64)
7. **Agenda Item 7 Schools Block Funding towards High Needs 2019 20 (002)** (Pages 65 - 88)
8. **Agenda Item 8 National Fair Funding Conference 18.10.18** (Pages 89 - 92)
9. **Early Years Sub Group**

Sefton Council

Sefton Schools Forum Minutes

Minutes of Sefton Schools' Forum Meeting Monday 24th September 2018 1.30pm PDC, Formby

Forum Members present: - Dorothy Lee Ogden (Chair), Ian Raikes, Simon Penney, David Jones, Cathy Earley, Matt Symes, Anna James, Isobel Macdonald-Davies, Danny Macareavy

In attendance:

Colette Jones	- Clerk to Sefton Schools Forum	(CJ)
Jenny Cunningham	- Service Manager School Improvement	(JC)
Nick Carbonaro	- Corporate Finance	(NC)
Kevin McBlain	- Corporate Finance CS Finance	(KM)
Charlene Smith	- Corporate Communications (Schools)	(CS)
Mark Chambers	- Corporate Finance	(MC)
Tracy McKeating	- Locality Team Leader	

Actions

1 Election of Chair and Vice Chair

Dorothy Lee Ogden was proposed by Isobel MacDonald Davies and seconded by Cathy Earley as Chair of Schools Forum

Isobel MacDonald Davies was proposed by Dorothy Lee Ogden and seconded by Cathy Early as Vice Chair of Schools Forum.

2 Apologies

Malcolm Parry, Sue Kerwin, Sue Clare, Toni Oxtan-Grant, Sharon Cowey, Niki Craddock and Mike McSorley

3 Minutes of the last meeting

Minutes from the last meeting were agreed except for Facility Time; this will be an agenda item at the next meeting after the STJNC has met and agreed terms.

4 Matters arising from Minutes

Kevin McBlain explained that Lancashire County Council and United Utilities were in discussions regarding a reduction of water bills for Nursery schools in the county. It is likely that United Utilities will give a concession to these schools on their water bills across the region. If any further information comes to light Kevin will update Forum members.

5 Schools Forum membership

Colette Jones asked members to consider the membership of Schools Forum in line with current guidance from the DfE. Members were asked to report back to SAPH/SASH/SGA and inform Colette Jones of any new representatives. Isobel Macdonald-Davies will become the secondary governor representative. Alena Elicerova has volunteered to become the Nursery Governor representative.

All to report back to Colette Jones before the next meeting

Agenda Item 2

6 School Forum Work Programme

The work programme for the coming year was introduced for information and aligns in accordance with DfE dates for submission of reports. Cathy Early asked whether the EY Sub group should be scrapped and replaced with a meeting of the wider Early Years 30 hours group, as there was more likely to be representation from the PVI's? This may need to be considered in the future. Cathy is to arrange an Early Years sub group before next Forum meeting.

7 Update on the Schools and High Needs Formula Funding for 2019/20

The DfE announced over the summer that the move towards using the National Formula Funding model for all schools, has been put back to 2021/22 at the earliest.

Schools have decided, based on representations after the last Forum meeting to continue with a local formulae model for 2019/20 as being the best option to ensure as much funding as possible is distributed to our schools.

The 2019/20 funding includes a further 0.5% growth per pupil and the basic units of funding for Primary and Secondary pupils have already been published in the summer. Final allocations to LA s will now only be adjusted for changes in pupil numbers arising from the October 2018 census.

In 2019/20, there is a requirement to support 3 secondary schools who do not meet the minimum per pupil funding requirement of £4,800 (up from £4,500 per pupil last year for secondary schools and for primary schools from £3,300 to £3,800).

The DfE have again allowed Local Authorities to consult with schools and request Schools Forum for contribution towards High Needs in 2019/20. This requires Schools Forum approval. In 2018/19, Schools Forum agreed contribution of £450k towards High Needs along with £200k allocation from Early Years. This level of support was again being requested by the LA for 2019/20, along with the possible request to increase the schools contribution to take it to the maximum value of 0.5% of the DSG Schools Block allocation. This would add a further c.£346k.

Kevin McBlain distributed some late formula funding model adjustments from those sent out with the agenda. These included a model with an assumed £450k top slice towards High Needs as agreed for 2018 ongoing; and a model assuming a full 0.5% deduction. Based on the local model, Forum was asked to at least continue the contribution to High Needs Funding which is facing increased pressures and an estimated overspend of £2.3m and also to consider offering up to the maximum 0.5% of Schools Block funding as explained above. With Forum approval to transfer up to 0.5% of the total Schools Block funding to High Needs, a dis-application is not required to go to the Secretary of State to determine a solution. However, if Forum fail to agree to a request (i.e up to 0.5% or above), a dis-application request would have to be submitted to the Secty of State by the LA by 30 November 2018.

Forum voted and agreed the continuation of funding for High Needs but did not approve a request for additional funding. However, a request to apply a full 0.5% of Schools funding will be discussed with schools in the coming weeks and at the next meeting of Schools Forum.

8 High Needs budget monitoring forecast as at July 2018

High Needs overspend is forecast to be £2.3m. This places any remaining uncommitted Centrally Retained DSG reserves in jeopardy, as first call on reserves is to offset any deficit. Kevin McBlain explained that the Local Authority can no longer bale out any DSG overspend yet the demand on the High Needs service is increasing with the LA facing on going pressure over the next year. The increase in spend relates to 'out of borough' provision; increased number of pupils remaining or accessing 6th form; increased day placements, and in part, the creation of 8 new places at Crosby High School from September 2018. High Needs overspending is becoming a national problem, with many LA's facing

Mike McSorley/Kevin McBlain to bring any further reports on funding issues to the next meeting or earlier if request for further schools block support is requested.

deficits in High Needs. Sefton's deficit can relate back, in part, to the non DfE funding of 38 extra places, and subsequent additional places in our special schools. The increase in EHC plans has also contributed to increase in demand for HN services.

Members will recall the decision to make a charge for Complimentary Education to help offset substantial additional costs being incurred by the service due to an increase in demand from schools through pupil referrals. This has been in place since April 2018, and there has been no discernible decrease in the level of demand for the service, which currently has 93 pupils (May 2018) referred, compared with 101 pupils (September 2017). A review of the new charges was agreed to be held within 6-9 months and will be reported back to next Forum. Currently this service is forecast to break-even in 2018/19 with the charges to schools assumed to remain in place

Members of Forum felt the LA ought to be tackling this overspend with a strategy and managing the High Needs funding better, as to provide extra funding from schools block would inevitably have an impact on educating children in classrooms who do not have SEND. Forum felt that parental expectations for their children in both High Needs special provision and in mainstream schools needs to be better managed to reduce expectations. The LA is considering some measures to try to reduce spending and these will be picked up as part of the HN review.

Forum were told that Waves Children's Services Consultancy Ltd have been appointed to conduct the High Needs SEN Review. They will start the review week commencing 1 October 2018 with a report expected by end of March 2019. Forum will be updated on progress.

9 Trade Union Facility Time funding report for Outturn 2017/18

Trade Union Facility Time funding is underspent by £110K. It was proposed that a partial refund be given to those academy schools contributing towards TU facility time pro-rated to their respected contributions and given based on reduced per pupil in 2019/20. It was proposed that underspending against Maintained schools contributions should be put towards schools facing financial difficulties.

However, Forum failed to agree the recommendation and requested a more detailed, transparent report for the next meeting with different recommendation, and following any deliberations arising from the STJNC meeting on 25 September 2018.

Mike McSorley to report back on this issue

10 Select Committee Exclusions Report (verbal)

Tracy McKeating presented data from North West Association of Children Services Directors on exclusions across the area. The number in Sefton has increased from 11 to 42 per annum over a 5-year period with 'one off incidents' becoming noticeably more frequent (drug use leading to use of weapons) and a higher number of pupil premium being excluded. The Local Authority are currently moving to a Locality model merging services to provide support for schools and communities and a review of the exclusion strategy will be undertaken to reduce the number of exclusions. The review will be partnership based and will incorporate all agencies eg CAMHS. Issues to be discussed as part of the review is managing parental expectations, reduce 'off site' education placements and an increased engagement with CAMHS.

A Sefton version of the report will be circulated to all.

Tracy McKeating will provide a Sefton version of the report for schools

Agenda Item 2

11 **Schools Funding Pack**

Report for information only – Packs were sent to schools in July 2018.

12 **Primary School benchmarking**

Information for maintained primary schools was provided in July to provoke challenge and questions around high costs for refuse collection and grounds maintenance; and phone/copying costs etc; and to enable schools to consider how to achieve increased income for example, from around offering 30 hours nursery provision; or attracting extra Pupil Premium or maximising their UIFSM Grant funding, when compared against other schools. This document can be shared with Governors. The information provided is more up to date than that provided by the DfE, using 2017/18 outturn data cleansed to enable better comparability between schools.

Forum was asked if a Procurement Sub Group should be created/revived as a way of collective bargaining for services and a reduction on costs.

There was no uptake on the proposal.

Date of Next Meeting

Monday 19th November 2018, 1.30pm-3.30pm, PDC, Formby

Towards the Education Inspection Framework (EIF) September 2019 - - Through a Curricular Lens

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Liverpool Archdiocese Secondary Headteachers' Conference

Joan Bonenfant, Senior Her Majesty's Inspector

Helen O'Neill, Her Majesty's Inspector

05 October 2018



Agenda Item 4

Objectives for the session

- For those in attendance to understand:
 - how research is supporting Ofsted's thinking about the curriculum
 - how a renewed focus on curriculum can provide additional impetus to address issues of social inequality
 - the key principles that are underpinning the development of the EIF
 - the role of leaders

The new framework will be one of the main ways in which we implement Ofsted's strategy



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Guiding principle	A force for improvement through intelligent, responsible and focused inspection and regulation		
Core values	<p>Children and students first</p> <p>We have high expectations for every child, regardless of background. Everything we do as an organisation is in the interests of children and students first and foremost</p>	<p>Independent</p> <p>Whether reporting on an institution, assessing policy outcomes or advising government, we do so without fear or favour</p>	<p>Accountable and transparent</p> <p>An organisation that holds others to account must be accountable itself. We are always open to challenge and scrutiny</p>
Strategic approach	<p>Intelligent</p> <p>All of our work will be evidence-led and our evaluation tools and frameworks will be valid and reliable</p>	<p>Responsible</p> <p>Our frameworks will be fair. We will seek to reduce inspection burdens and make our expectations and findings clear</p>	<p>Focused</p> <p>We will target our time and resources where they can lead directly to improvement</p>
	<p>The new framework will be based on a solid evidence base relating to educational effectiveness and valid inspection practice.</p>	<p>We will continue to be clear about our expectations and fight misconceptions.</p>	<p>We will remove any measures that do not genuinely assess quality of education and training. We will prioritise weaker provision and observe more outstanding practice.</p>

Agenda Item 4

The curriculum will be at the heart of the new framework

Ofsted's working definition:

- 'The curriculum is a **framework** for setting out **the aims** of a programme of education, including the knowledge and understanding to be gained at each stage (**intent**)
- for translating that framework over time into a **structure and narrative**, within an institutional context (**implementation**) and
- for **evaluating** what **knowledge and skills** pupils have **gained** against expectations (**impact/achievement**).

The importance of the curriculum

*"Twelve years of education should give children a lot more than a disposition to learn and some ill-defined skills. Yet the evidence from the first stage of our research this year is that **the focus on substance, on the knowledge that we want young people to acquire, is often lost...***

*...If their entire school experience has been designed to push them through mark-scheme hoops, rather than developing **a deep body of knowledge, they will struggle in later study.**"*



Curriculum: ensuring a focus on the real substance of education

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Purpose of the curriculum study

Purpose 1: Influence wider thinking on the role and importance of the curriculum in education by:

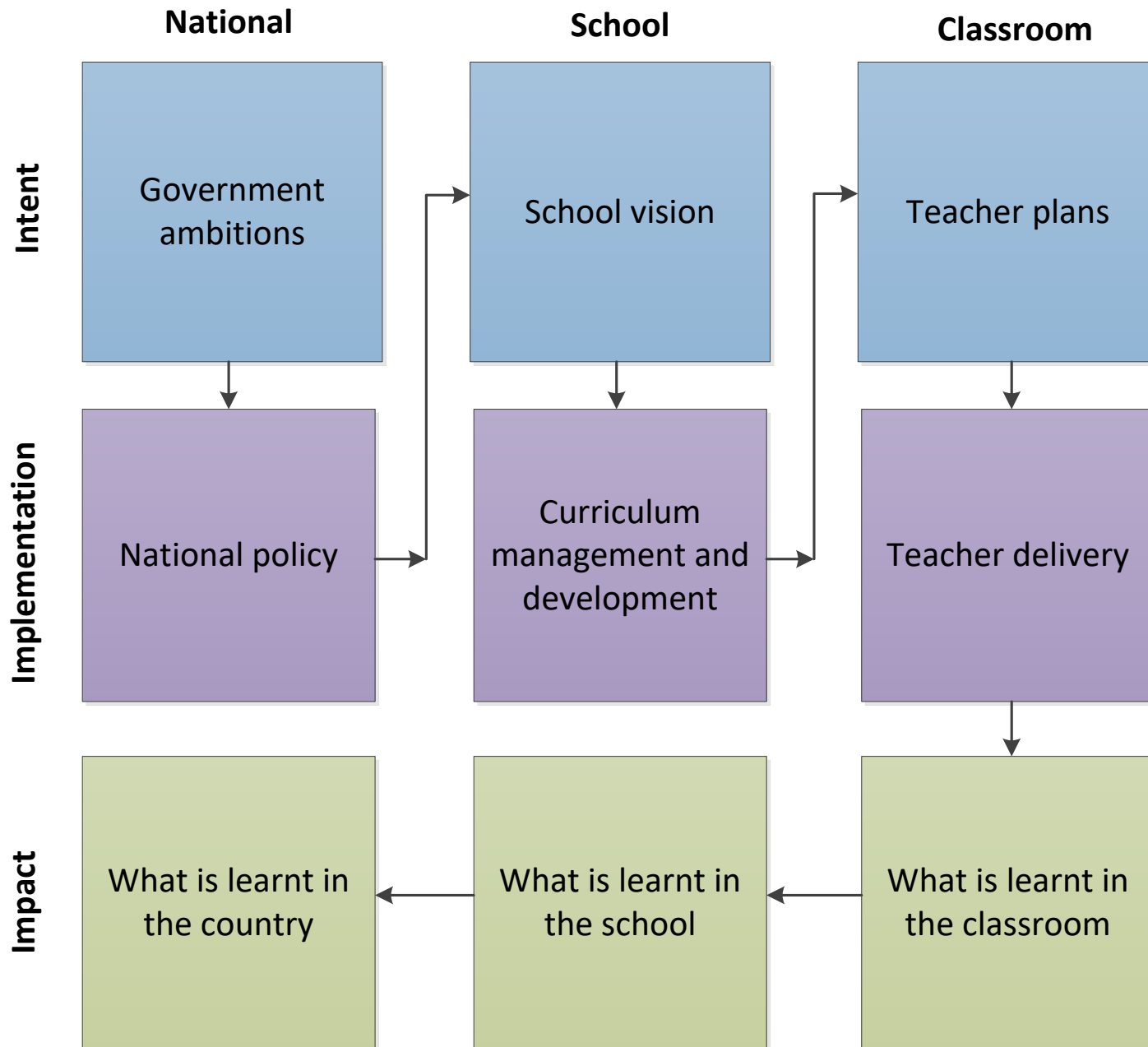
- developing a rigorous evidence base on the relative importance of the curriculum in outcomes
- identifying linkages between the curriculum and increased social mobility

Purpose 2: Inform inspection policy by:

- understanding the current impact of inspection policy and practice on the curriculum in schools
- understanding the drivers of strategic decision making in schools and how to deploy inspection effectively in this context
- identifying the characteristics of an outstanding curriculum that is underpinned by evidence of successful outcomes for pupils

Purpose 3: Inform policy making in the DfE by:

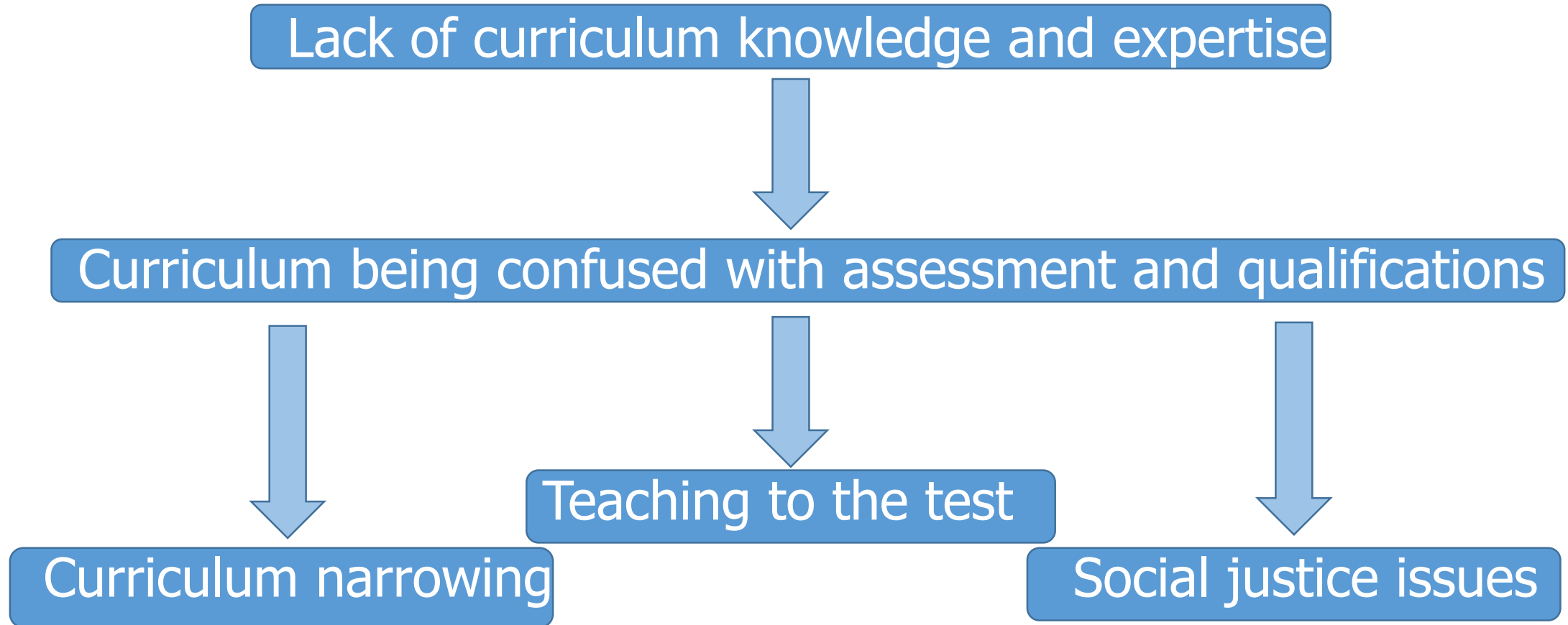
- testing the extent to which the curriculum at school and classroom level is influenced by national policy levers or other factors



Findings from the curriculum research (phase 1)



What did the curriculum survey (phase 1) find?



Findings from the curriculum research (phase 2)

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Across the schools we visited we found several factors that may be linked to curriculum quality

- Focus on subject disciplines even when topics are taught
- Considering depth and breadth of curriculum content
- Seeing the curriculum as the progression model
- Having a clear purpose for assessment
- Reviewing and evaluating curriculum design
- Clear curriculum leadership (often distributed) and ownership
- Considering local context and filling gaps from pupil backgrounds

The next phase of curriculum research is informing the developing framework

- We recently published the second phase of the curriculum research.
- In this phase we tried to **learn lessons from schools** that are particularly invested in curriculum design, with a view to developing indicators around curriculum intent, implementation and impact.
- We aim to use this evidence to turn the **common curriculum factors** leaders told us about into quality indicators, which will inform the draft **evaluation criteria** for the framework.
- We are now **testing** these indicators in schools to refine them.

Ongoing research – phase 3

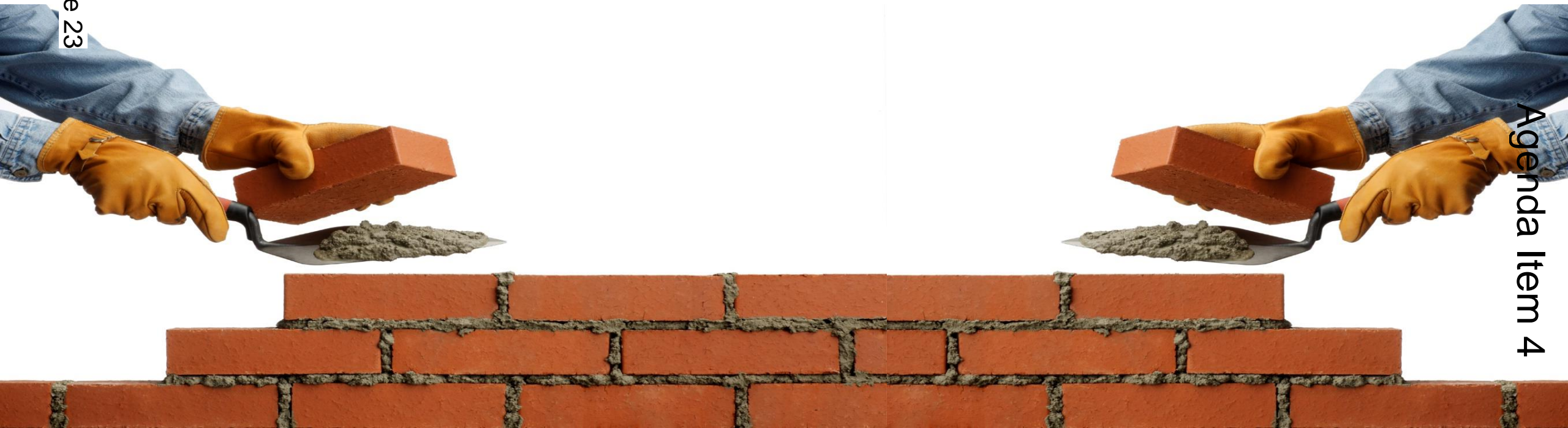


What do we mean when we talk about progress?



What does it mean to 'get better' at languages, mathematics, history or English?

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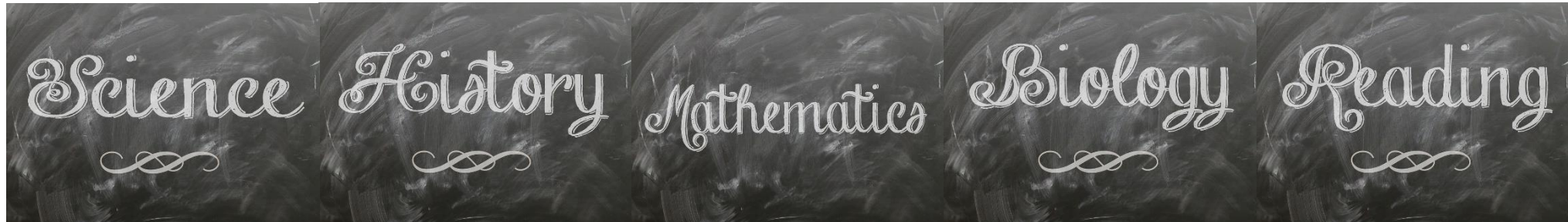


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Has the content of the curriculum been learned long term?

'Learning is defined as an alteration in long-term memory. If nothing has altered in long-term memory nothing has been learned.'

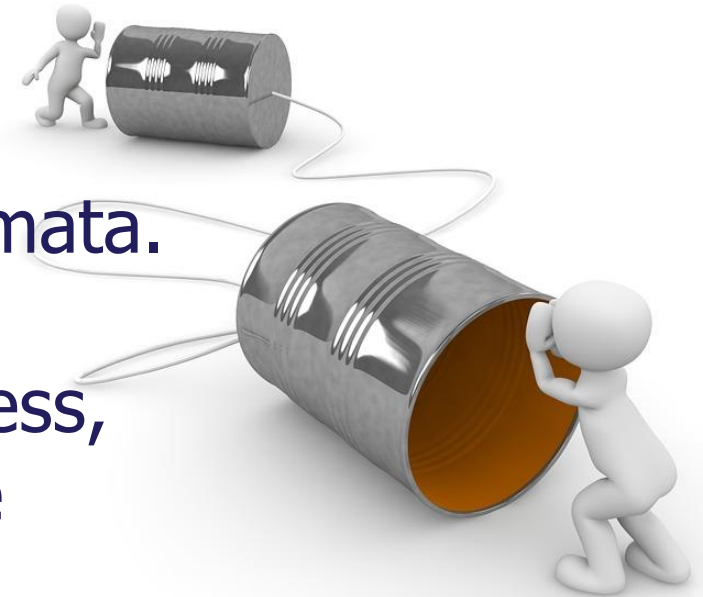
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Sweller, J., Ayres, P., & Kalyuga, S. (2011). Cognitive load theory (Vol. 1). Springer Science & Business Media.

Concepts that matter when discussing the curriculum

- Progress means knowing more and remembering more.
- Knowledge is generative (or 'sticky'), i.e. the more you know easily you can learn.
- Knowledge is connected in webs or schemata.
- Vocabulary size relates to academic success, and schooling is crucial for increasing the breadth of children's vocabulary.



How a focus on curriculum can provide additional impetus to address issues of social inequality

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There is no doubt that the leadership challenge facing some schools is great. But progress is possible and we should all be wary of using the makeup of a school community as an excuse for underperformance.

I do find myself frustrated with the culture of 'disadvantage one-upmanship' that has emerged in some places. Fixating on all the things holding schools back can distract us all from working on the things that take them forward. Instead what is needed is greater support and leadership from within the system. That means making sure the system has the capacity to provide this support.

And this isn't about just about incremental 'interventions' or 'challenge'. Good schools teach a strong curriculum effectively, and they do it in an orderly and supportive environment: getting this right is the core job of any school. That is what we need to help these problematic schools to deliver.

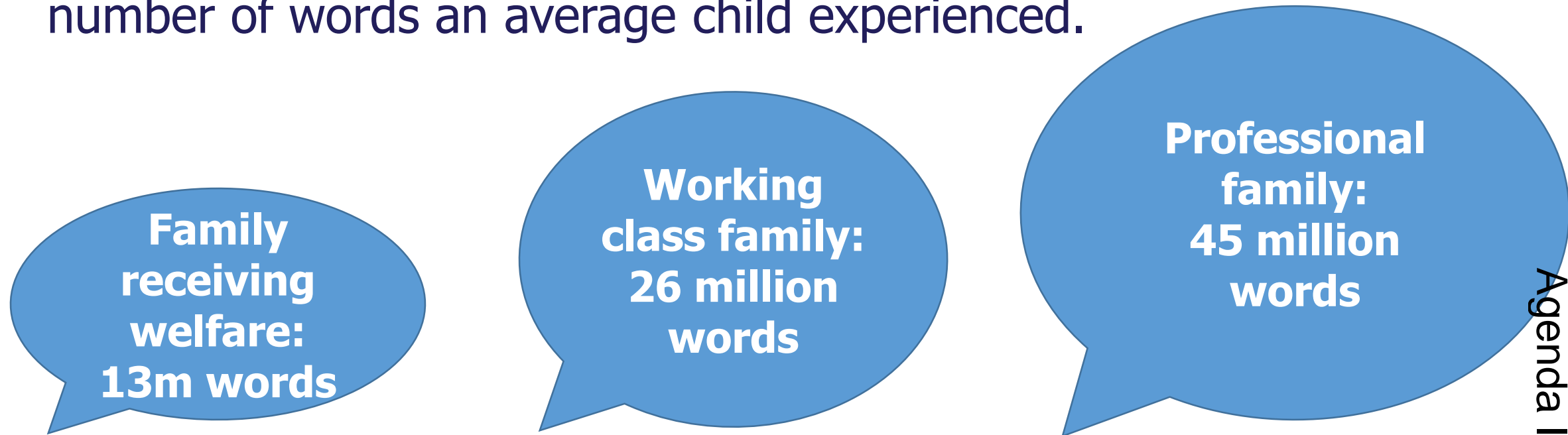
Amanda Spielman HMCI, December 2017



Vocabulary size matters

Findings of the Hart and Risley landmark study:
Over four years, researchers recorded the accumulated number of words an average child experienced.

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Hart, B., & Risley, T. R. (1995). Meaningful differences in the everyday experience of young American children. Paul H Brookes Publishing.

Schooling is crucial for increasing the breadth of children's vocabulary

- Around 90% of vocabulary is only regularly encountered in writing and is not commonly used in speech.
- Teen fiction does not give access to the more academic vocabulary and syntax used for high-level GCSE, A level and beyond.
- Academic writing provides exposure to complex **vocabulary** and **ideas** that must be grasped for academic success.

Stanovich, K. E. (1993). Does reading make you smarter? Literacy and the development of verbal intelligence. Advances in child development and behavior, 24, 133-180.

What would it take for education to counter the 30 million word gap identified by Hart and Risley, already predicting the educational trajectory of some children when they are four years old?



Vocabulary size relates to academic success

- The reason is clear: vocabulary size is a convenient proxy for a whole range of educational attainment and abilities — not just skill in reading, writing, listening, and speaking **but also general knowledge of science, history, and the arts.**
- If we want to reduce economic inequality, a good place to start is the subject classroom.



Curriculum leadership



The importance of the curriculum

“There need be no tension between success on these exams and tests and a good curriculum. Quite the opposite. A good curriculum should lead to good results. However, good examination results in and of themselves don’t always mean that the pupil received rich and full knowledge from the curriculum. In the worst cases, teaching to the test, rather than teaching the full curriculum, leaves a pupil with a hollowed out and flimsy understanding.”

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HMCI’s curriculum commentary, 11 October, 2017



Whose knowledge?

In some subjects, like history, the selection of content can be controversial with heated debate over content choices. Are leaders choosing the curriculum content with thought and care?



What happens when pupils don't learn the knowledge they need?

Knowledge deficits accumulate when layered on top of one another in a curriculum sequence.

This accumulation of dysfluency (gaps) limits and may even prevent acquisition of complex skills that depends on their prior knowledge.

This problem is called '**cumulative dysfluency**'

Key questions for leaders

- What is it important for your pupils to know, understand and be able to do by the time they leave (given the school's context)?
 - How do you develop the curriculum within the context of national policy?
 - How do you ensure that the curriculum alleviates the potential impact of disadvantage rather than perpetuate it?
- Page 37
- How do you ensure that staff share a common understanding of the school's curriculum?
How do you structure the curriculum in each discipline to facilitate progress (knowing more and remembering more)?
- How do you structure the curriculum so learning in each discipline helps pupils to construct interconnected webs of knowledge (schema)?
 - How do you evaluate the impact of the curriculum in light of your intentions?
 - How do you develop the curriculum in light of your evaluations?
 - How do you minimise the potential risks of any unintended consequences of your curriculum?

Questions to help consider curriculum quality



Intent

- How far do school leaders consider the quality of the curriculum in each subject as a driver of progress?

Implementation

- How effectively do school leaders/teachers consider the content and sequencing of the curriculum in each subject?

Impact

- How well are pupils learning the content outlined in the curriculum?

Until the EIF is introduced, inspectors will continue to inspect using the current handbook



When judging the effectiveness of leadership and management, inspectors will consider:

- The design, implementation and evaluation of the curriculum, ensuring breadth and balance and its impact on pupils' outcomes and their personal development, behaviour, welfare
- How well the school supports the formal curriculum with extra-curricular opportunities for pupils to extend their knowledge and understanding and to improve their skills in a range of artistic, creative and sporting activities.

Update on the development of the Education Inspection Framework - September 2019

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"an evolution, not a revolution"

Amanda Spielman on the 2019 inspection framework (Wellington Festival of Education 2018)



Towards a 2019 inspection framework – what aspects will we need to judge?

- We are clear that we need to take a rounded view of the **quality of education** offered by schools and providers.
- The **curriculum** will be at the core, recognising the close connection between curricular content and the way that this content is **taught** and **assessed** in order to support children to build their knowledge and to apply that knowledge.
- We remain very interested in children and learners' **wider development** including the attitudes and behaviours they bring to the classroom.
- Schools' and providers' **leadership and management** are likely to remain key areas of consideration.

Reduce the duplication in the current CIF judgements

Leadership & management

- Leadership
- Governance
- **Teaching**
- **Progress**
- Attitudes and ethos
- **Safeguarding**

Teaching, learning & assessment

- **Teaching practice**
- **Behaviour**
- Homework
- Classroom and resource organisation
- **Reading**
- Information to parents

Personal development, behaviour & welfare

- Pupil attitudes
- Careers guidance
- **Behaviour**
- Bullying
- **Preparation for next stage of learning, employment, or training**
- Attendance
- **Safeguarding**

Outcomes

- **Progress**
- Attainment
- **Reading**
- **Preparation for next stage of learning, employment, or training**

Eliminate the conflation in current CIF judgements

- Multiple issues are also conflated into individual criteria and some cover elements addressed in other judgements. This issue is replicated across all four judgement areas and in all remits.

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Teaching, learning & assessment

- Teachers plan lessons very effectively, making maximum use of lesson time and coordinating lesson resources well. They manage pupils' behaviour highly effectively with clear rules that are consistently enforced.

It is clear that the current handbook considers a **lesson** as the primary unit of organisation. Really we are concerned with how effectively the **curriculum** is planned across the **whole course of study**.

What does the use of time and resources in an individual lesson tell us about the quality of teaching across a school?

This is typical of the current criteria, many include fugitives from other judgement areas.

Judgement areas: our working **hypothesis**



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Quality of education

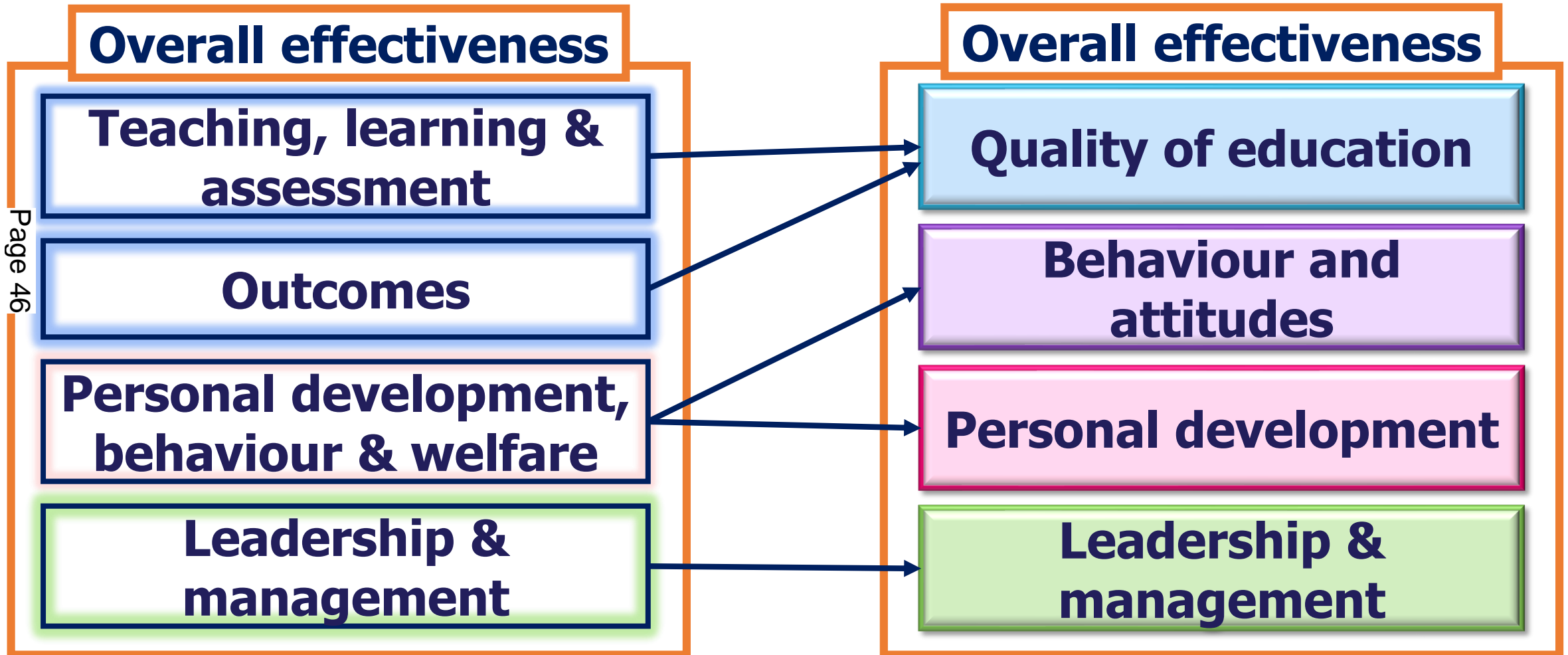
Behaviour and attitudes

Personal development

**Leadership &
management**

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Judgement areas: evolution, not revolution



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Judgements: our working hypothesis in detail

Quality of education
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Intent

- Curriculum design, coverage and appropriateness

Implementation

- Curriculum delivery
- Teaching (pedagogy)
- Assessment (formative and summative)

Impact

- Attainment and progress (incl national tests & assessments)
- Reading
- Destinations

Behaviour and attitudes

- Attitudes to learning
- Behaviour
- Exclusions
- Attendance
- Bullying

Personal development

- SMSC
- Fundamental British Values
- Careers guidance
- Healthy living
- Citizenship
- Equality & diversity
- Preparation for next stage

Leadership & management

- Vision & ethos
- Staff development
- Staff workload and wellbeing
- Off-rolling
- Governance / oversight
- Safeguarding

Agenda Item 4

An **evolution**, not a revolution

The new framework draws on the **knowledge built up through our inspection history** as well as **wider research**.

There is **continuity**, but also a **sharper focus** on:

- **Quality of education** rather than on data
- **Workload for teachers and leaders**
- **Off-rolling**



Keep our focus on safeguarding, reflecting Ofsted's latest thinking



Our inspection of safeguarding will continue to be built around three core areas:

- **Identify:** are leaders and other staff identifying the right children and how do they do that?
- **Help:** what timely action do staff within the provider take, and how well do they work with other agencies?
- **Manage:** how do responsible bodies and staff manage their statutory responsibilities, and in particular, how do they respond to allegations about staff and other adults?

The grading structure

- We are likely to keep the **same four level grading structure** including requires improvement and inadequate.
- We have said that we will **retain** the **outstanding grade** in the new framework, reflecting parents' wishes.
- To ensure public confidence in the grading, we'd like to see the **removal of the outstanding exemption.**
- This will be subject to agreement the **DfE** on funding and the **will of parliament.**



In summary: key principles as we develop new judgement areas and criteria

- As far as possible, aim to feature each criterion in only one judgement area
- Criteria will be based on the evidence relating to educational effectiveness
- Continue to make a single, overall judgement about a provider
- Have common key judgements but allow flexibility in how we apply those in different remits (EY, schools, independent schools, FES)
- Continue to emphasise safeguarding appropriately
- Reduce focus on data – more focus on how schools are achieving results; less pressure to produce assessment information
- Retain the current four-point grading scale
- Wherever possible reduce workload: teachers, leaders and inspectors.

What next?

- We are undertaking a process of testing and piloting within Ofsted as we look towards the new **Education Inspection Framework 2019**.
- **This term**, we are beginning to share the developing thinking with partners across the sectors we inspect and invite their thoughts and views – this shapes and influences what we produce.
- **Research** continues on the curriculum, lesson observation, work scrutiny and a wide range of other topics. The findings are feeding directly into the draft framework.
- We will consult on the substance and detail of the new framework (not just high level principles) over **Spring Term 2019**.
- The final framework will be published in **Summer 2019**, and will go live from **1 September 2019**.

Until the EIF is introduced, inspectors will continue to inspect using the current handbook



From the L&M outstanding descriptor:

'The broad and balanced curriculum inspires pupils to learn. The range of subjects and courses helps pupils acquire knowledge, understanding and skills in all aspects of their education, including humanities and linguistic, mathematical, scientific, technical, social, physical and artistic learning.'

Clarification statements

Current handbook, in the clarification for schools section:

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“Inspectors **will** discuss with school leaders their curriculum vision and ambitions for their pupils, including consideration of Ebacc subjects as part of their curriculum offer.”

“There is no benchmark or single route to the successful implementation of a curriculum with the Ebacc at its core, although inspectors will evaluate how a school’s curriculum plans contribute to the government’s ambition.”

In summary: key points from today

- The EIF will be based on a solid evidence base of what works well in schools.
- The curriculum, as the real substance of education, will be at the heart of the EIF.
- Inspectors will look closely at the intent, implementation and impact of the curriculum.
- Ofsted does not endorse any particular curriculum.

Any questions?



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www.gov.uk/ofsted

<https://reports.ofsted.gov.uk>

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Sefton Schools Forum Report

Date of Meeting:	19 November 2018
Title of Report:	Early Years 2018/19 Forecast Spending
Presenting Officer:	Kevin McBlain
Reason for Submission to Forum:	(4) ITEM FOR INFORMATION
Executive Summary:	To provide members with information on the Early Years forecast spending position for 2018/19.
Budget/Risk Implications:	None
Recommendations:	<ol style="list-style-type: none"> 1. Forum is asked note the 2018/19 Early Years forecast outturn position and the commitments against the DSG Early Years Reserves and 2. The intention of the LA to continue with the contribution of £0.200m towards High Needs budget pressures in 2019/20. This funding is being used towards rising early years inclusion costs borne out of High Needs budgets.
Appendices <small>(to be attached)</small>	None
Background Papers <small>(available on request)</small>	Forecast budget/outturn working paper (Nov 2018)
Report Originator and Contact Details	Name: Kevin McBlain Tele: 01519344049 E-mail: Kevin.mcblain@sefton.gov.uk

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)

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1. Background

- 1.1 The purpose of this report is to inform Forum members, of the Early Years spending forecast for 2018/19.

2. Funding for Early Years 2018/19

- 2.1 The allocated funding for Early Years in 2018/19 as reported to Schools Forum in January 2018, and adjusted by the DfE in July 2018 for the January Headcount Census is as follows:

Early Years 3-4 year old funding 2018/19	£
Including for the extra 15 hours	
Base Rate & Deprivation Funding to Providers	13,213,228
Maintained Nursery Schools Transitional Funding given for 3 years 2017/18 to 2019/20	596,726
SEN Inclusion Fund (EY Contribution to High Needs)	57,524
EY LA Provider Support Services incl Early Years Inclusion grants (£55k)	231,700
New Disability Access Funding	70,725
Early Years Pupil Premium	118,186
Transitional Formula Funding – EY Contingency Fund	286,016
TOTAL Revised 3-4 YO EY Funding 2018/19	14,574,105
Less agreed Contribution towards High Needs budget pressures in 2018/19	-200,000
Total 3-4 YO EY Funding for allocation 2018/19 after contribution to High Needs	14,374,105
2 Year Old funding 2018/19	
Base Rate Funding to Providers	2,572,271
Provider Support Services	181,420
TOTAL 2 YO EY Funding 2018/19	2,753,691
Total DSG Funding Early Years 2018/19	17,127,796

- 2.2 The current Universal Base Rate paid by the LA to all Sefton Providers was set at £4 per hour from April 2017, and this rate has continued into 2018/19, including for the extra hours of free entitlement for 3-4 year olds based on working parents. A mandatory payment towards deprivation funding is also available to Providers based on a range of

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payments between £0.05p – to £0.15p per hour dependent upon banded levels of deprivation. No other supplements are payable.

- 2.3 In addition to the Base funding above, Maintained Nursery Schools are in receipt of some transitional funding over three years (2017/18 to 2019/20) to cover their exceptional costs of operating as schools. There have been no further announcements regards any continuation of this funding beyond 2019/20.
- 2.4 All Providers may benefit from drawing down Early Years Pupil Premium (EYPP), given for eligible children from low income families, however based on actual take-up over the previous year, this funding has been reduced in July 2018, from ££0.199m to £0.118m. This figure will always fluctuate dependent upon claims made by Providers, based on information from parents of 3-4 year olds. EYPP equates to an extra hourly rate of £0.53p per hour per eligible child or £302 per annum and is given only for the universal free entitlement hours.
- 2.5 The funding allocations also include Disability Access Funding, which is payable to Providers who provide for children with disabilities and are claiming Disability Living Allowance. This is payable as a lump sum of £615 pa per child.
- 2.6 In order to support the Early Years children with High Needs, the SEN Inclusion Fund was established within High Needs, to pay Providers some top up inclusion funding, where the basic hourly rate is insufficient to cover the extra costs of support. Early Years agreed to a transfer of the Early Years funding allocation based on £0.02p per hour to give to High Needs towards these costs (£0.057m). However, this level of funding was proving inadequate to meet the demands being felt within the High Needs budgets; and Schools Forum agreed with the LA in September 2017, to support Early Years inclusion and support for resourced nursery places within High Needs in 2018/19 by a contribution of £0.200m from the Early Years Funding Block towards budget pressures. This level of funding contribution is considered again for 2019/20, as High Needs budget pressures continue. In fact, costs have increased further in 2018/19, due to the expansion of the extra 15-hour childcare support for working parents.
- 2.7 A request by the LA to make the same level of contribution of £0.200m from Early Years to High Needs has been made to Forum in September 2018 for 2019/20. The Early Years national funding allocation given to the Authority within the Early Years Block, includes a sum of £0.200m to bring its funding level to a minimum National floor level of £4.30 p hour and this is the funding which has been diverted to High Needs use in 2018/19 to support these extra cost pressures. This funding position is ongoing into 2019/20.
- 2.8 The numbers of eligible 2 year olds in child care provision has reduced over the last 12 months and its funding has been reduced for 2018/19, on the basis of the January 2018 headcount, indicating slightly lower numbers than the previous year from £2.778m to £2.572m
- 2.9 The Local Authority base hourly rate payable to providers for 2 Year olds was increased in April 2017 from £4.55 per hour to £4.90 per hour in line with a national increase in funding. This same level of support has been ongoing into 2018/19.

3.0 Forecast outturn for Early Years 2018/19

- 3.1 In respect of 2018/19, the latest forecast outturn position, using data available at the end of October 2018, suggests an initial under spend across Early Years of £-0.664m. Tables below summarise the forecast position.

Early Years Free Entitlement for 3-4 year olds

- 3.2 The budget and latest forecast outturn for 2018/19, in respect of the free Universal and extra 15 hours childcare for 3-4 year olds, is broken down in the table below for information:

<u>3-4 Year Old Free Entitlement</u>	<u>2018/19 Budget £</u>	<u>Forecast Outturn £</u>
All provision	13,809,954	13,216,502
SEN Inclusion Fund (EY Contribution to High Needs)	57,524	57,524
New Disability Access Funding	70,725	70,725
Early Years Pupil Premium	118,186	162,887
EY Contingency Fund	86,016	0
EY LA Provider Support Services incl Early Years Inclusion grants	231,700	254,200
Early Years Entitlement 3-4 Year Olds	14,374,105	13,761,838
Forecast under spend 2018/19 against 3-4 year old entitlement		-612,267

- 3.3 The forecast position against 3-4 year olds Free Entitlement, is currently suggesting a net under spend of £-0.612m. This is largely based upon the catch-up funding between the DfE's original estimated number of children taking up the extra 15 hours childcare for working parents from September 2017 (i.e when the extra hours started); and the year end March 2018; and additional funding to reflect the full year effect of the extra hours from April 2018, all based on the actual census headcount as at January 2018. Basic entitlement across the sector appears to be underspending by around £-0.593m. However, it is possible the Spring numbers and census data in January 2019 may indicate a fall in numbers, as the extra hours starts to settle. Such a change would be adjusted in July 2019, and would see funding recovered by the DfE next year.

Early Years Free Entitlement for eligible 2 year olds

- 3.4 The forecast position for the 2-year-old offer is shown in the table below for information, and initially suggests a small under spend of £-0.052m largely around the support costs.

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3.5 These costs and the release of Early Years reserves are also shown in the table below.

<u>2 Year Old Offer</u>	2018/19 Budget £	Forecast Outturn £
Statutory Places	2,572,271	2,591,998
Support services to the 2YOO	181,420	109,880
Overall Funding for the 2YOO in 2018/19 and Forecast spending	2,753,691	2,701,878
Forecast under spend 2018/19 against 2 year old funding		-51,813
<u>EARLY YEARS DSG RESERVES</u>		
Opening balance of Early Years central DSG reserves 1.4.2018	291,156	291,156
Approved by Schools Forum:	Agreed	Forecast
Maintained Nursery School Project	40,000	40,000
Up to 40 Discretionary places for ineligible 2 year olds with SEND	111,720	47,312
Training	63,000	0
Reserve allocated and Estimated expenditure in 2018/19	214,720	87,312
Early Years uncommitted DSG reserves original and based on forecast spending 2018/19	76,436	203,844

3.6 The overall forecast position for the Early Years Block in 2018/19, is an estimated under spend of £-0.664m. Any unused funding on the 2YOO and 3-4-year-old free entitlement will automatically carry forward for use in 2018/19 into the Early Years DSG reserves.

3.7 Members should note that it is highly likely that the High Needs budget will overspend in 2018/19 possibly in excess of £2m, and that first call could be on the Centrally retained DSG Early Years reserves above to mitigate the overspend, since DSG High Needs centrally retained reserves were exhausted in 2017/18. The overall position of

Early Years will continue to be monitored carefully and reports will be brought to Forum periodically for information.

- 3.8 Announcements about the Early Years funding for 2019/20 are expected in early December 2018. Details will be brought to the next Schools Forum meeting in January 2019.

4.0 Recommendations

- 4.1 Forum is asked to note the 2018/19 Early Years forecast outturn position and the commitments against the DSG Early Years Reserves.
- 4.2 Forum is asked to note the intention of the LA to continue with the contribution of £0.200m towards High Needs budget pressures in 2019/20. This funding is being used towards rising early years inclusion costs borne out of High Needs budgets.

Sefton Schools Forum Report

Date of Meeting:	19 November 2018
Title of Report:	Request to Schools Forum to increase the level of support from Schools Block towards High Needs budget pressures in 2019/20.
Presenting Officer:	Kevin McBlain/Mike McSorley
Reason for Submission to Forum:	(1) ITEM FOR APPROVAL (4) ITEM FOR INFORMATION
Executive Summary:	<p>The Local Authority has consulted all schools over the significant demand pressures / overspend on the High Needs Budgets and has asked schools to increase the School Block contribution to support High Needs further in 2019/20. The outcome of this consultation will be discussed with members of Schools Forum.</p> <p>The Local Authority is requesting approval from the Schools Forum to increase the level of support (over that already agreed at £0.450m), up to the maximum amount on the DfE's guidance (0.5% of the Schools Block funding allocation) £0.796m.</p>
Budget/Risk Implications:	None
Recommendations:	<ul style="list-style-type: none"> • Forum is asked to note the consultation paper shared with Headteachers and discussed at a special meeting on 5 November 2018. • Forum is asked to agree, by a vote of those eligible, to increase the 2019/20 Schools Block contribution towards ongoing High Needs budget pressures from £0.450m (the level of support already agreed at Forum on 26 September 2018), up to a maximum of 0.5% of Schools Block funding £0.796m – Both Primary and Secondary phases to vote. • Note the intention of the Local Authority to make a disapplication to the Secretary of State, in the event Schools Forum do not agree to approve the increase in the Schools Block contribution towards the High Needs contribution from £450k to the maximum 0.5% of the Schools Block (£0.796m).

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	<ul style="list-style-type: none"> Note further, that should a dis-application be necessary, and prove unsuccessful, the Local Authority will need to consider measures necessary to reduce the level of its High Needs resources available to Providers in 2019/20, in order to try to balance the books and avoid exceeding new DfE overspending limits of 1% of DSG funding imposed from 2018/19.
Appendices (to be attached)	Appendix 1 – Consultation paper on High Needs; Appendix 2 - a comparability spreadsheet of funding by school, between the Base 2018/19 funding and indicative funding models for 2019/20. Appendices 3 & 4 - Indicative DfE APT models of funding (Pro-Forma) for 2019/20, adopting the local formula funding (at £0.450k and £0.796m contributions respectively)
Background Papers (available on request)	DfE’s Operational guide to Schools Funding 2019 to 2020 (Summer 2018)
Report Originator and Contact Details	Name: Kevin McBlain Tele: 0151934 4049 E-mail: kevin.mcblain@sefton.gov.uk

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)

High Needs budget pressures and the request for increased financial support from the Schools Block 2019/20

1. Background

- 1.1 At the last Schools Forum in September, Members received a report asking them to agree to an ongoing contribution of £0.450m from the Schools Block towards the High Needs budget pressures in 2019/20; and asking them to consider increasing this to the maximum 0.5% of Schools Block allocation (£0.796m). Members were given an analysis of the indicative formula funding effects on schools after both levels of contribution.
- 1.2 At a vote, Forum members agreed to accept a similar contribution of £0.450m next year but not to any additional contribution. Following this decision, the Head of Education Excellence called a consultation meeting with Headteachers to discuss the High Needs budget pressures and to ask them to consider supporting an increase to the contribution. The meeting was held on 5 November 2018 and was reasonably well attended.
- 1.3 DfE guidance dictates, that where Schools Forum disagree with the Local Authority in approving transfers of funding exceeding 0.5% percent of the Schools Block funding, the Local Authority need to request a Secretary of State determination, by making a formal Dis-application request, with reasons and evidence in support. This situation also applies where a Local Authority has made a request within the 0.5% tolerance level, and Schools Forum disagrees.
- 1.4 The purpose of this report is to update members of Forum on the consultation meeting with Headteachers and to request Schools Forum to reconsider increasing the contribution towards High Needs as indicated above in 2019/20, to the maximum 0.5% level.

2. The key issues

- 2.1 The key pressures facing High Needs are included in the consultation paper, which was sent to all schools prior to the consultation meeting, and is attached to this report at Appendix 1 and some general points from the consultation are included below:
 - Projected High Needs overspend by March 2019 is forecast at over £2.3m
 - There has been a 35% increase in the numbers of young people with Plans coming into the High Needs system since 2013:
 - Early Years Resourced Nursery Places and Inclusion support for Early Years children in Schools Nursery and Private Placements_- increase in spending since 2013/14 of over £0.255m, from £0.215m to just over £0.470m pa by 2018/19
 - Primary School top up costs and demands_- these have risen since 2013/14 from £1.501m to £3.061m, in 2018/19
 - Special School / Resources Unit Planned Places and top ups and extra demands on funding due to increasing numbers/ complexity of children's needs costs have

risen by 34% from £3.685m to £4.933m in 2018/19 (£1.248m). 38 new ASD places were created from 2014/15 unfunded by the DfE, leaving a long term funding shortfall which has been difficult to maintain within existing resources.

- Post 16 HN costs - when funding was originally given to LA s for High Needs, Sefton's element 3 Top Up for Post 16 places was already **£1.7m** below the levels of required top-up spending. Whilst resources have been managed carefully, the costs for Post 16 (16-18yo) have risen by £0.642m from 2013/14 to 2018/19 (£2.650m to £3.181m) and Post 16 (19-24yo) is forecast to overspend by £0.212m in 2018/19

2.2 The consultation was open to all Headteachers to attend and was reasonably well attended. The general feeling was that, whilst they all acknowledged the budget pressures across High Needs, they had real concerns about the level of pressures on their own schools' budgets, and some headteachers felt that they could not give up any more funding willingly. The Head of Education Excellence agreed to write to all schools to obtain some general feedback over the issue and to assist Schools Forum to arrive at a decision whether to agree to increase the Schools Block contribution from £450k to the maximum 0.5% of Schools Block allocation £796k; or not.

2.3 At the last Schools Forum in September, Members were given an analysis of the indicative funding effects on schools assuming the ongoing contribution of £0.450m and the indicative effects of increasing this contribution to the level of the maximum 0.5% of Schools Block funding. This paper is again provided in Appendix 2 along with the Indicative APT Pro Forma figures for both funding models at Appendix 3 and 4 respectively.

2.4 Following the consultation and the request of the Local Authority for schools to consider an increase to the contribution in support of the High Needs, Forum are now asked to reconsider the level of Schools Block support for an increase to the maximum 0.5% level (£0.796m); whilst the LA seeks to find ways of reducing costs to bring spending back to budget level; and whilst it awaits the recommendations of the High Needs review currently underway and due to report back in early 2019 with subsequent actions.

3 Recommendations

3.1 Forum is asked to note the consultation paper shared with Headteachers and discussed at a special meeting on 5 November 2018.

3.2 Forum is asked to agree, by a vote of those eligible, to increase the 2019/20 Schools Block contribution towards ongoing High Needs budget pressures from £0.450m (the level of support already agreed at Forum on 26 September 2018) up to a maximum of 0.5% of Schools Block funding £0.796m – Both Primary and Secondary phases to vote.

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- 3.3 Note the intention of the Local Authority to make a dis-application to the Secretary of State, in the event Schools Forum do not agree to approve the increase to the Schools Block contribution towards the High Needs contribution from £450k to the maximum 0.5% of the Schools Block (£0.796m).
- 3.4 Note further, that should a dis-application be necessary, and prove unsuccessful, the Local Authority will need to consider measures necessary to reduce the level of High Needs resources available to Providers in 2019/20, in order to try to balance the books and avoid exceeding new DfE overspending limits of 1% of DSG funding imposed from 2018/19.

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Paper for consultation on High Needs increasing budget pressures and request for support funding from Schools and Early Years Block DSG in 2019/2020.

1. Background

- 1.1 This paper is brought in consultation with schools out of a growing concern for increased and ongoing budget pressures being felt on High Needs services this year and going into 2019/20; and to seek approval to top slice the maximum permitted amount of funding up to 0.5% of Schools Block DSG for High Needs without recourse to the LA making a disapplication to the Secretary of State to make a determination where Schools Forum fail to agree the top slice request.
- 1.2 Last year (2017/18), the outturn on High Needs ended with an overspend of £1.8m. The major contributors to the overspend were the commissioning of additional new places at two Special Schools - Rowan Park High and Merefield school for extra pupils and for the provision of extra resources and support to other schools for children and young people with very complex needs.
- 1.3 Officers took a report to the Schools Forum on 24 September 2018 indicating that High Needs has a significant forecast overspend of £2.3m in 2018/19, as at August 2018. This year, a further 8 children (a class) with SEN have been placed at our in-house special school, Crosby High School. This is at the request of the LA to increase their intake, and to avoid the very expensive costs of placing children in out of borough day schools. This makes financial sense where it can be accommodated
- 1.4 For background information, there has been a 35% increase in the numbers of young people with Plans coming into the High Needs system since 2013. The table below shows the overall increase in numbers year by year group:

Age Range	Increase
Under age 5	17
Aged 5 to 10	6
Aged 11 to 15	14
Aged 16 to 19	215
Aged 20 to 25	88
Total	340

- 1.5 In 2013/14 and 2014/15 the High Needs budgets were adjusted annually by the DfE to reflect changes in the numbers planned places being commissioned by LA s using the November High Needs census return. This allowed LA s to actively manage demand and increased costs pressures. This also allowed the LA to use any flexibility within the High Needs budgets, along with some High Needs balances, in any invest to save programmes locally. In Sefton funding was used to contribute towards new building works and set up costs at some Units, along with Resourced Unit transitional funding support when the new High Formula Funding methodology was set up during this period. The High Needs budget was

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also able to contribute some one-off, set up costs for the two the PRUs when they were given delegated budgets in 2013/14.

- 1.6 However, from 2015/16 the DfE flatlined High Needs Funding to Councils and no longer gave additional funding for increases in SEN numbers and as a result the High Needs budgets started to be overspent (£0.704m) as demand for places increased but funding was kept at a fixed level.
- 1.7 Pressure on LA budgets through increasing numbers of children with EHC plans needing a place in special provision has grown steadily since 2015/16, and although the LA has tried its best to contain costs, in house provision is now virtually full, often leaving external provision as the only means of placement.
- 1.8 Pressures on schools' budgets in recent years, caused by inadequate settlements and unfunded cost pressures has meant schools too, are often unable to meet the demands placed on them in managing children with low incidence special needs and disabilities. This in turn has led to growing requests through our SEN panel for additional High Needs funding to support their provision.
- 1.9 This report recognises the very special problems schools are facing in managing children with special / complex needs and the associated costs. However the demands placed on the High Needs budgets is also pressured, as numbers of children with SEN and EHC plans increases placing the LA with an obligation to fund new places and additionality, with little increases to the High Needs funding allocations
- 1.10 The financial situation is unsustainable going forward and it seems that similar pressures are being felt around other NW authorities. The guidance from the DfE on setting the schools formula funding for 2019/20, is to allow Local Authorities again, to seek schools and Schools Forum permission to transfer funding, of up to 0.5% of its Schools Block Funding into High Needs, subject to consultation and agreement of the Schools Forum.
- 1.11 On 24 September 2018, Schools Forum were presented with a report seeking their ongoing support for a contribution of £0.450m (or 0.29% of the Schools Block allocation) towards High Needs cost pressures in 2019/20, in line with their contribution towards 2018/19 funding. Members were also asked to consider a further contribution in 2019/20 of £0.336m to take this up to the maximum level of contribution (£0.786m) i.e 0.5% of the SB allocation based on the latest funding allocation subject to the October 2018 pupil census.
- 1.12 Schools Forum members agreed by Phase, to support a similar sum to that allowed in 2018/19 (£0.450m) but not to any extra amount. The impact per school of both actions was demonstrated at the meeting through provision of a financial model. This is attached for information.
- 1.13 This decision leaves the LA with a significant projected budget gap on the High Needs budget in 2019/20 and the LA is therefore requesting that schools to consider a level of increase up to the 0.5% level for 2019/20 on the basis of a

rising deficit on High Needs spending and on the basis that the overall DSG must be seen as a shared funding structure of support.

- 1.14 If there is no agreement to support up to 0.5% Schools Block funding then the LA will need to consider financial risk to the High Needs budget going forward and whether to place the decision with the DfE through a disapplication request.
- 1.15 The LA recognises the need to take urgent action in reducing High Needs overspending and a review of High Needs is now underway. This will enable a range of actions to be considered that will help bring costs down and move towards a more sustainable and balanced budget.
- 1.16 The DfE are now requesting information from LA s at the end of this financial year (2018/19) around reasons and actions being taken to reduce any deficit balances against their High Needs if these exceed 1% of their total High Needs funding allocations. It is becoming increasingly urgent for LA s to demonstrate actions towards recovering from a deficit position.

2. Request for funding and High Needs Budget pressures

- 2.1 Attached to this consultation document is a detail breakdown of the growing budget pressures within High Needs (Appendix 1). This provides information on spending levels; Funding levels and Balances from 2013/14, (the onset of the new High Needs funding regime) through to the forecast for 2018/19.
- 2.2 The main budget pressures are as follows:

Early Years Resourced Nursery Places and Inclusion support for Early Years children in Schools Nursery and Private Placements.

This budget area has seen an increase in spending since 2013/14 of over £0.255m, from £0.215m to just over £0.470m pa by 2018/19. This is over 100% increase in spending and is due, in part, to increasing numbers of younger children with special needs being identified earlier; and with eligible 2 year olds starting at nursery as added cohorts of children entering the education system. In addition, there is the increasing cost of having trained and specialist staff and support equipment in the right quantities to handle this growing demand. Since 2017/18, the number of resourced Nursery places has been reduced from 28 to 23 but numbers of these Early Years children funded for more than 15 hours a week child care is increasing, with an +11 children between August 2017 and August 2018 now funded for more than 15 hours per week as they access the new 30 hours early years offer.

Primary School top up costs and demands

These have risen substantially since 2013/14 from spending of £1.501m to £3.061m, the forecast spending in 2018/19. This is an increase of £1.560m or

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101% and similarly could be due to increasing demands from Early Years children who are diagnosed already with special needs by the time they reach Primary school age. The costs of early SEN diagnosis and support are cutting in earlier and in larger numbers than previously experienced. There has also been an increasing use of 'exceptional funding' agreements to provide additional support for High Needs pupils to enable them to remain in mainstream schools. The LA, via the SENIS team are now trialling School Provision agreements with a total package for all pupils with High Needs agreements in a move to apply more considered application of scarce resources. Work is being done with schools to ensure efficient and effective use of school and high needs resources to support pupils with SEND in mainstream provision.

Secondary Top Up costs

These have risen by 54% since 2013/14 from spending of £0.721m to an estimated £1.112m spending in 2018/19 (an increase in spending of £0.391m).

Special School / Resources Unit Planned Places and top ups and demands

Due to increasing numbers and changes in the complexity of children's needs costs have risen by 34% from £3.685m to an estimated £4.933m pa by 2018/19 (£1.248m). The number of Special Needs places have increased over the last few years with 38 new ASD places created from 2014/15 – 2015/16 across Resourced Units and Special Schools.

This was a planned invest to save decision to help meet demographic demands with a strategy that in-house provision would gradually replace expensive Day and Residential school places. However, some major factors have hampered this strategy. The fact that in 2015/16 the DfE refused to fund any extra places, having conducted a full place survey the year before and funded many new places to set a baseline in 2014/15.

The DfE still require the LA to complete a November census return each year showing the number of SEND places it commissions but they will not adjust funding levels for any change in planned places for LA maintained special schools. Any additional places must now be met from existing resources, which has put the High Needs in a strained resource position ever since.

As demand for in-house provision at Special Schools exceeds maximum levels, there is a now a growing increase in the numbers of children being placed in Independent Special schools at high cost. The level of independent day and residential placements and costs has risen from £2.568m in 2013/14 to £3.223m in 2018/19, an increase of £0.655m or 26%. Particularly significant is the increase in external placement costs from 2017/18 to this year 2018/19 of £0.655m.

The number of Special school places continue to rise with demographic demand. Each September the LA has to provide an additional 8 places to the

newly created Rowan High Special School until it reaches its full occupancy level. In 2018/19 the LA has also had to commission an extra 8 places at Crosby High from Sept 2018 to stop further children being placed Out of Borough in expensive Independent Special School provision. Similarly, Merefield Special School has taken extra children over and above their allotted intake to help the LA meet demand. These have a serious cost implication to meet demand.

Pupil Referral Units

In 2016/17 the LA had to commission extra places created in Impact, to meet significant increases in demand, as more children and young people are being excluded from mainstream schools. This area has seen an increase in spending since 2013/14 of £0.612m from £2.049m to £2.661m in 2018/19 an increase of 30%, as more schools appear to be excluding pupils permanently with behavioural problems.

Post 16 HN costs

When funding was originally given to LA s for High Needs, Sefton's element 3 Top Up for Post 16 places was already **£1.7m** below the levels of required top-up spending. Based on our budget analysis, costs for Post 16 (16-18yo) have risen by £0.642m from 2013/14 to 2018/19 (£2.650m to £3.181m). Post 16 (19-24yo) is forecast to overspend by £0.212m in 2018/19. These areas are becoming more pressured as more pupils are wishing to stay on at In-House provision, rather than go to FE colleges etc

- 2.3 These then, are the main budget pressure areas across High Needs. Totalling the net changes in spending since 2013/14, the increase has been £3.6m compared with DfE High Needs funding settlement increases of just £1.7m since 2013/14. This shortfall amounts to £1.9m which equates to the level of changed spending between 2013/14 and 2018/19 latest forecasts. Funding has not kept pace of demand and costs.
- 2.4 Work has been undertaken as part of the longer-term strategy to review and reduce costs where possible. This has had some success. Specialist services have been provided in-house, therefore reducing reliance on external contracts and decommissioning underutilised specialist places for example in dyslexia units. However, the increases in demand outlined above have resulted in an overall cost increase.
- 2.5 The High Needs service includes a Complementary Education Unit which deals with referrals of pupils from mainstream schools, who often have behavioural or mental health issues. The Unit provides 1:1 support and tuition during absence from school and this can be at home if a child is sick, or at the Pinefield Unit in Formby. Costs of this service have seen a sharp increase over the last 12-18 months with numbers of referrals rising from 57 in 2016 to around 109 children in 2017. Since 2018, a charge has been introduced to schools towards the increased costs of a growing cohort of pupil referrals to the Service. This charge will be

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reviewed should numbers of referrals reduce and costs come down to the level of the budget. High numbers referred to Comp Ed seem to be sustained into 2018.

3 Statistics in support of growing costs

- 3.1 The table below is used to demonstrate the trends in the numbers of children and average costs of providing Top Ups since 2014/15. This shows the numbers of children increasing year on year in each provision along with increasing average costs of Top-ups, adding significant additional costs to High Needs.

<u>Year</u>	<u>No.of Children</u>	<u>Average Top-Up (£) p child</u>
2014/15		
Mainstream Primary	273	£4,597
Mainstream Secondary	118	£5,208
Mainstream Special	556	£8,062
2015/16		
Mainstream Primary	296	£4,809
Mainstream Secondary	130	£5,512
Mainstream Special	563	£8,350
2016/17		
Mainstream Primary	344	£4,604
Mainstream Secondary	137	£5,710
Mainstream Special	578	£8,955
2017/18		
Mainstream Primary	354	£5,081
Mainstream Secondary	146	£6,925
Mainstream Special	642	£9,277
2018/19 (Sept 2018)		
Mainstream Primary	366	£5,645
Mainstream Secondary	150	£6,048
Mainstream Special	622	£9,709

- 3.2 Data is also shown below, of the average costs and numbers of children in Day and Residential placements for information, where numbers and costs appear to be on the increase since 2017/18.

<u>Year</u>	<u>No.of Children</u>	<u>Average costs (£) p child</u>
<u>Non-Maintained Day Schools Placements</u>		
2014/15	62	£44,121

2015/16	49	£49,084
2016/17	42	£41,922
2017/18	67	£38,512 / £42,730 Full Year effect
<u>Residential Placements</u>		
2014/15	3	£71,742
2015/16	8	£61,461
2016/17	5	£57,832
2017/18	5	£65,814

4 Funding request

- 4.1 Funding for High Needs was increased in 2018/19 by the contribution of £0.450m from Schools Block and £0.200m from Early Years, however with cost pressures due to significant increases in demand and despite efforts to reduce costs, this has since proven insufficient to help balance the budget.
- 4.2 The current position for High Needs suggests there is a forecast overspend of approximately £2.3m. It is hoped that through the High Needs Review currently underway and a number of possible measures to reduce cost, plus ongoing support from schools block and early years, the level of deficit may be reduced down. The indicative funding settlement for next year by the DfE would suggest Sefton may only get an extra £0.127m towards demographic/population change, which is very low level of increase to the base funding for 2019/20.
- 4.3 The Early Years block continues to receive the same level of funding for 2019/20 and it is considered that the level of contribution it gave towards High Needs (£0.200m) should be repeated in 2019/20. The LA is empowered to transfer money between Early Years and High Needs Blocks without the same restrictions as apply to transfers from the Schools Block. This would help in 2019/20.
- 4.4 With a contribution of £0.200m from Early Years, this would reduce the anticipated shortfall to around £1.9m, the level of support being requested from schools for 2019/20 at the maximum 0.5% would provide an additional funding of £0.786m. This added to the increase of funding from the DfE at £0.127m would support High Needs by just over £1.1m in 2019/20.
- 4.5 The effects of a full 0.5% top-slice from Schools Block is modelled as part of this consultation with schools to see the effects on each school before a decision is taken to recommend to Forum in November 2018.

5. Recommendations

- 5.1 Schools are asked to consider this paper and proposals to top-slice a contribution towards High Needs budget pressures in 2019/20 to the maximum 0.5% of Schools Block funding (£0.786m) and to make a recommendation to Schools Forum accordingly. The decision ultimately rests with Schools Forum.

Agenda Item 7

LAESTAB	School Name	Post MFG budget 2018/19	19-20 Post MFG Budget - Assuming continuation of £450k contribution to High Needs in 2019/20 -1.5% MFG & 1.25% Cap	Variance against funding allocation assuming ongoing £450k contrib to High Needs	Revised Funding Model - Full 0.5% top-slice (£792k) towards High Needs -1.5% MFG / & 0.41% Cap	Variance against proposed funding allocation assuming full 0.5% Schools contribution towards High Needs in 19/20	Variance against Base 18/19 funding allocation assuming full 0.5% Schools contribution towards High Needs in 19/20
Total		£ 156,318,814	£156,880,007	£561,194	£156,533,966	-£346,041	£215,152
3432008	Linacre Primary School	£ 787,417	£ 795,880	£8,464	£790,373	-£5,507	£2,957
3432013	Netherton Moss Primary School	£ 884,276	£ 873,183	-£11,093	£873,146	-£37	-£11,131
3432023	The Grange Primary School	£ 1,159,380	£ 1,145,256	-£14,124	£1,144,329	-£927	-£15,051
3432030	Birkdale Primary School	£ 1,503,012	£ 1,506,079	£3,066	£1,503,903	-£2,176	£890
3432032	Churchtown Primary School	£ 2,964,253	£ 2,970,782	£6,529	£2,968,624	-£2,158	£4,371
3432034	Farnborough Road Junior School	£ 1,754,539	£ 1,775,304	£20,765	£1,761,830	-£13,474	£7,291
3432035	Farnborough Road Infant School	£ 1,343,201	£ 1,335,374	-£7,827	£1,333,054	-£2,320	-£10,147
3432036	Linaker Primary School	£ 1,874,584	£ 1,889,136	£14,552	£1,882,174	-£6,962	£7,590
3432038	Norwood Primary School	£ 1,777,203	£ 1,790,614	£13,411	£1,784,748	-£5,867	£7,544
3432047	Marshside Primary School	£ 763,842	£ 772,056	£8,214	£766,781	-£5,276	£2,939
3432048	Kew Woods Primary School	£ 1,526,083	£ 1,532,723	£6,640	£1,530,499	-£2,224	£4,416
3432050	Aintree Davenhill Primary School	£ 1,505,616	£ 1,523,245	£17,629	£1,511,844	-£11,401	£6,228
3432053	Hudson Primary School	£ 742,321	£ 745,529	£3,208	£743,215	-£2,314	£894
3432054	Waterloo Primary School	£ 1,577,923	£ 1,580,737	£2,814	£1,578,891	-£1,846	£968
3432056	Forefield Junior School	£ 1,355,883	£ 1,358,754	£2,871	£1,356,398	-£2,356	£515
3432057	Forefield Community Infant and Nursery School	£ 1,028,619	£ 1,040,181	£11,562	£1,032,709	-£7,472	£4,090
3432060	Lander Road Primary School	£ 922,603	£ 924,170	£1,568	£922,066	-£2,104	-£536
3432063	Litherland Moss Primary School	£ 846,912	£ 836,369	-£10,543	£836,331	-£37	-£10,580
3432066	Hatton Hill Primary School	£ 1,416,486	£ 1,419,125	£2,639	£1,417,273	-£1,852	£787
3432067	Northway Primary School	£ 1,102,116	£ 1,114,058	£11,941	£1,106,449	-£7,608	£4,333
3432075	Woodlands Primary School	£ 1,177,899	£ 1,180,286	£2,387	£1,177,882	-£2,404	-£17
3432076	Summerhill Primary School	£ 809,224	£ 810,777	£1,553	£808,349	-£2,428	-£875
3432078	Freshfield Primary School	£ 867,483	£ 869,194	£1,712	£866,772	-£2,422	-£710
3432080	Green Park Primary School	£ 799,280	£ 800,877	£1,598	£798,413	-£2,464	-£866
3432086	Redgate Community Primary School	£ 632,964	£ 634,104	£1,139	£631,736	-£2,368	-£1,229
3432087	Kings Meadow Primary School and Early Years Education C	£ 773,641	£ 775,023	£1,381	£772,769	-£2,254	-£873
3432088	Larkfield Primary School	£ 1,118,175	£ 1,120,372	£2,197	£1,118,052	-£2,320	-£123
3432089	Shoreside Primary School	£ 797,147	£ 802,382	£5,234	£799,966	-£2,416	£2,818
3432090	Melling Primary School	£ 806,096	£ 807,656	£1,560	£805,246	-£2,410	-£850
3432091	Valewood Primary School	£ 823,414	£ 825,001	£1,587	£822,603	-£2,398	-£811
3432092	Lydiate Primary School	£ 1,105,923	£ 1,108,081	£2,158	£1,105,773	-£2,308	-£150
3432093	Bedford Primary School	£ 1,750,227	£ 1,737,414	-£12,812	£1,735,664	-£1,750	-£14,562
3433000	Christ Church of England Controlled Primary School	£ 1,411,790	£ 1,414,315	£2,525	£1,412,553	-£1,762	£763
3433010	St John's Church of England Primary School	£ 732,137	£ 739,908	£7,771	£734,865	-£5,044	£2,727
3433020	St Andrew's Maghull Church of England Primary School	£ 1,160,605	£ 1,162,938	£2,333	£1,146,915	-£16,023	-£13,689
3433024	St Luke's Church of England Primary School	£ 1,499,220	£ 1,515,424	£16,204	£1,505,316	-£10,109	£6,095
3433025	St Philip's Church of England Controlled Primary School	£ 817,670	£ 826,527	£8,857	£820,777	-£5,750	£3,107
3433303	St Oswald's Church of England Primary School	£ 896,489	£ 897,824	£1,334	£895,690	-£2,134	-£800
3433304	Holy Trinity Church of England Primary School	£ 911,519	£ 921,439	£9,919	£914,819	-£6,620	£3,300
3433305	St Philip's Church of England Primary School	£ 815,327	£ 816,537	£1,210	£814,115	-£2,422	-£1,212
3433307	Ainsdale St John's Church of England Primary School	£ 825,761	£ 830,176	£4,415	£827,814	-£2,362	£2,053
3433313	St Monica's Catholic Primary School	£ 1,666,220	£ 1,685,640	£19,420	£1,672,730	-£12,910	£6,510
3433316	St Robert Bellarmine Catholic Primary School	£ 846,072	£ 851,542	£5,469	£849,121	-£2,421	£3,049
3433322	Holy Spirit Catholic Primary School	£ 837,317	£ 838,544	£1,228	£836,428	-£2,116	-£888
3433336	Holy Family Catholic Primary School	£ 833,786	£ 835,148	£1,362	£832,726	-£2,422	-£1,060
3433337	Our Lady of Lourdes Catholic Primary School	£ 1,966,016	£ 1,969,455	£3,439	£1,967,267	-£2,188	£1,251
3433338	St Teresa's Catholic Infant and Nursery School	£ 362,563	£ 365,608	£3,045	£363,590	-£2,018	£1,027
3433339	St Patrick's Catholic Primary School	£ 1,337,088	£ 1,346,166	£9,077	£1,342,150	-£4,016	£5,061
3433342	St John's Church of England Primary School	£ 763,526	£ 764,756	£1,230	£762,430	-£2,326	-£1,096
3433343	St Luke's Halsall Church of England Primary School	£ 802,768	£ 804,101	£1,333	£801,655	-£2,446	-£1,113
3433345	St Nicholas Church of England Primary School	£ 803,667	£ 805,021	£1,354	£802,587	-£2,434	-£1,080
3433351	St George's Catholic Primary School	£ 721,476	£ 729,029	£7,553	£724,012	-£5,017	£2,536
3433353	Great Crosby Catholic Primary School	£ 2,379,976	£ 2,394,642	£14,667	£2,389,437	-£5,206	£9,461
3433354	St Mary's Catholic Primary School	£ 460,779	£ 464,941	£4,162	£462,197	-£2,743	£1,419
3433355	St Edmund's and St Thomas' Catholic Primary School	£ 1,172,466	£ 1,174,466	£2,001	£1,172,134	-£2,332	-£331
3433357	Our Lady Star of the Sea Catholic Primary School	£ 882,318	£ 870,988	-£11,330	£870,951	-£38	-£11,367
3433359	Our Lady of Compassion Catholic Primary School	£ 905,626	£ 907,178	£1,552	£904,762	-£2,416	-£864
3433361	English Martyrs' Catholic Primary School	£ 1,587,822	£ 1,594,635	£6,813	£1,592,357	-£2,278	£4,535
3433362	St Elizabeth's Catholic Primary School	£ 1,503,682	£ 1,521,037	£17,356	£1,509,469	-£11,569	£5,787
3433364	St William of York Catholic Primary School	£ 862,463	£ 868,499	£6,037	£865,580	-£2,919	£3,118
3433366	Our Lady Queen of Peace Catholic Primary School	£ 587,342	£ 585,754	-£1,587	£583,620	-£2,134	-£3,721
3433367	St Gregory's Catholic Primary School	£ 811,757	£ 813,088	£1,332	£810,642	-£2,446	-£1,114
3433368	Ursuline Catholic Primary School	£ 1,544,240	£ 1,546,944	£2,704	£1,544,582	-£2,362	£342
3433369	St Jerome's Catholic Primary School	£ 817,931	£ 826,748	£8,816	£820,964	-£5,784	£3,032
3433374	Holy Rosary Catholic Primary School	£ 1,522,445	£ 1,525,124	£2,679	£1,522,762	-£2,362	£317
3433375	St John Bosco Catholic Primary School	£ 798,978	£ 800,290	£1,312	£797,802	-£2,488	-£1,176
3433376	Bishop David Sheppard Church of England Primary School	£ 972,375	£ 959,757	-£12,619	£959,719	-£37	-£12,656
3433378	Springwell Park Community Primary School	£ 1,709,358	£ 1,689,302	-£20,055	£1,687,988	-£1,314	-£21,370
3433379	Thomas Gray Primary School	£ 926,457	£ 918,853	-£7,604	£917,025	-£1,828	-£9,432
3433380	Trinity St Peter's CofE Primary School	£ 827,291	£ 828,690	£1,399	£826,232	-£2,458	-£1,059
3433382	St Benedict's Catholic Primary School	£ 869,075	£ 870,426	£1,351	£868,100	-£2,326	-£975
3433383	Our Lady of Walsingham Catholic Primary School	£ 888,171	£ 889,491	£1,320	£887,321	-£2,170	-£850
3433384	All Saints Catholic Primary School	£ 1,390,097	£ 1,392,218	£2,120	£1,390,570	-£1,648	£472
3433385	Rimrose Hope CofE Primary School	£ 1,219,648	£ 1,203,469	-£16,180	£1,203,431	-£38	-£16,217
3434110	Meols Cop High School	£ 4,225,569	£ 4,232,009	£6,440	£4,229,509	-£2,500	£3,940
3434611	Savio Salesian College	£ 2,674,531	£ 2,677,687	£3,156	£2,675,187	-£2,500	£656
3434621	Maricourt Catholic High School	£ 5,495,451	£ 5,513,487	£18,036	£5,510,987	-£2,500	£15,536
3434623	Sacred Heart Catholic College	£ 5,125,627	£ 5,156,975	£31,348	£5,146,731	-£10,244	£21,104
3434624	Holy Family Catholic High School	£ 3,771,258	£ 3,776,109	£4,851	£3,773,609	-£2,500	£2,351
3434800	Christ The King Catholic High School and Sixth Form Centre	£ 4,538,197	£ 4,544,368	£6,171	£4,541,868	-£2,500	£3,671

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3434000	The Hawthorne's Free School	£ 1,549,347	£ 1,567,439	£18,092	£1,555,609	-£11,830	£6,262
3434001	St Michael's Church of England High School	£ 3,434,873	£ 3,385,661	-£49,212	£3,385,624	-£37	-£49,249
3434002	Hillside High School	£ 4,078,527	£ 4,083,204	£4,677	£4,080,704	-£2,500	£2,177
3434004	Litherland High School	£ 3,464,456	£ 3,506,402	£41,946	£3,478,422	-£27,980	£13,966
3434005	Stanley High School	£ 3,113,722	£ 3,099,587	-£14,136	£3,097,087	-£2,500	-£16,636
3434100	Deyes High School	£ 5,526,755	£ 5,583,901	£57,146	£5,583,901	£0	£57,146
3434101	Formby High School	£ 4,017,495	£ 4,093,539	£76,044	£4,093,539	£0	£76,044
3434105	Chesterfield High School	£ 5,269,317	£ 5,295,582	£26,265	£5,291,017	-£4,565	£21,700
3434106	Range High School	£ 4,551,828	£ 4,647,684	£95,856	£4,647,684	£0	£95,856
3434108	Birkdale High School	£ 3,372,986	£ 3,377,579	£4,593	£3,375,079	-£2,500	£2,093
3434109	Greenbank High School	£ 4,766,431	£ 4,772,949	£6,518	£4,770,449	-£2,500	£4,018
3434113	Maghull High School	£ 3,588,599	£ 3,593,329	£4,730	£3,590,829	-£2,500	£2,230
3433341	St Thomas Church of England Primary School	£ 804,787	£ 806,154	£1,366	£803,064	-£3,090	-£1,724

LAESTAB	School Name	Post MFG budget 2018/19	19-20 Post MFG Budget - Assuming continuation of £450k contribution to High Needs in 2019/20 -1.5% MFG & 1.25% Cap	Variance against funding allocation assuming ongoing £450k contrib to High Needs	Revised Funding Model - Full 0.5% top-slice (£792k) towards High Needs -1.5% MFG / & 0.41% Cap	Variance against proposed funding allocation assuming full 0.5% Schools contribution towards High Needs in 19/20	Variance against Base 18/19 funding allocation assuming full 0.5% Schools contribution towards High Needs in 19/20
Total		£ 156,318,814	£156,880,007	£561,194	£156,533,966	-£346,041	£215,152
3432008	Linacre Primary School	£ 787,417	£ 795,880	£8,464	£790,373	-£5,507	£2,957
3432013	Netherton Moss Primary School	£ 884,276	£ 873,183	-£11,093	£873,146	-£37	-£11,131
3432023	The Grange Primary School	£ 1,159,380	£ 1,145,256	-£14,124	£1,144,329	-£927	-£15,051
3432030	Birkdale Primary School	£ 1,503,012	£ 1,506,079	£3,066	£1,503,903	-£2,176	£890
3432032	Churchtown Primary School	£ 2,964,253	£ 2,970,782	£6,529	£2,968,624	-£2,158	£4,371
3432034	Farnborough Road Junior School	£ 1,754,539	£ 1,775,304	£20,765	£1,761,830	-£13,474	£7,291
3432035	Farnborough Road Infant School	£ 1,343,201	£ 1,335,374	-£7,827	£1,333,054	-£2,320	-£10,147
3432036	Linaker Primary School	£ 1,874,584	£ 1,889,136	£14,552	£1,882,174	-£6,962	£7,590
3432038	Norwood Primary School	£ 1,777,203	£ 1,790,614	£13,411	£1,784,748	-£5,867	£7,544
3432047	Marshside Primary School	£ 763,842	£ 772,056	£8,214	£766,781	-£5,276	£2,939
3432048	Kew Woods Primary School	£ 1,526,083	£ 1,532,723	£6,640	£1,530,499	-£2,224	£4,416
3432050	Aintree Davenhill Primary School	£ 1,505,616	£ 1,523,245	£17,629	£1,511,844	-£11,401	£6,228
3432053	Hudson Primary School	£ 742,321	£ 745,529	£3,208	£743,215	-£2,314	£894
3432054	Waterloo Primary School	£ 1,577,923	£ 1,580,737	£2,814	£1,578,891	-£1,846	£968
3432056	Forefield Junior School	£ 1,355,883	£ 1,358,754	£2,871	£1,356,398	-£2,356	£515
3432057	Forefield Community Infant and Nursery School	£ 1,028,619	£ 1,040,181	£11,562	£1,032,709	-£7,472	£4,090
3432060	Lander Road Primary School	£ 922,603	£ 924,170	£1,568	£922,066	-£2,104	-£536
3432063	Litherland Moss Primary School	£ 846,912	£ 836,369	-£10,543	£836,331	-£37	-£10,580
3432066	Hatton Hill Primary School	£ 1,416,486	£ 1,419,125	£2,639	£1,417,273	-£1,852	£787
3432067	Northway Primary School	£ 1,102,116	£ 1,114,058	£11,941	£1,106,449	-£7,608	£4,333
3432075	Woodlands Primary School	£ 1,177,899	£ 1,180,286	£2,387	£1,177,882	-£2,404	-£17
3432076	Summerhill Primary School	£ 809,224	£ 810,777	£1,553	£808,349	-£2,428	-£875
3432078	Freshfield Primary School	£ 867,483	£ 869,194	£1,712	£866,772	-£2,422	-£710
3432080	Green Park Primary School	£ 799,280	£ 800,877	£1,598	£798,413	-£2,464	-£866
3432086	Redgate Community Primary School	£ 632,964	£ 634,104	£1,139	£631,736	-£2,368	-£1,229
3432087	Kings Meadow Primary School and Early Years Education C	£ 773,641	£ 775,023	£1,381	£772,769	-£2,254	-£873
3432088	Larkfield Primary School	£ 1,118,175	£ 1,120,372	£2,197	£1,118,052	-£2,320	-£123
3432089	Shoreside Primary School	£ 797,147	£ 802,382	£5,234	£799,966	-£2,416	£2,818
3432090	Melling Primary School	£ 806,096	£ 807,656	£1,560	£805,246	-£2,410	-£850
3432091	Valewood Primary School	£ 823,414	£ 825,001	£1,587	£822,603	-£2,398	-£811
3432092	Lydiat Primary School	£ 1,105,923	£ 1,108,081	£2,158	£1,105,773	-£2,308	-£150
3432093	Bedford Primary School	£ 1,750,227	£ 1,737,414	-£12,812	£1,735,664	-£1,750	-£14,562
3433000	Christ Church of England Controlled Primary School	£ 1,411,790	£ 1,414,315	£2,525	£1,412,553	-£1,762	£763
3433010	St John's Church of England Primary School	£ 732,137	£ 739,908	£7,771	£734,865	-£5,044	£2,727
3433020	St Andrew's Maghull Church of England Primary School	£ 1,160,605	£ 1,162,938	£2,333	£1,146,915	-£16,023	-£13,689
3433024	St Luke's Church of England Primary School	£ 1,499,220	£ 1,515,424	£16,204	£1,505,316	-£10,109	£6,095
3433025	St Philip's Church of England Controlled Primary School	£ 817,670	£ 826,527	£8,857	£820,777	-£5,750	£3,107
3433303	St Oswald's Church of England Primary School	£ 896,489	£ 897,824	£1,334	£895,690	-£2,134	-£800
3433304	Holy Trinity Church of England Primary School	£ 911,519	£ 921,439	£9,919	£914,819	-£6,620	£3,300
3433305	St Philip's Church of England Primary School	£ 815,327	£ 816,537	£1,210	£814,115	-£2,422	-£1,212
3433307	Ainsdale St John's Church of England Primary School	£ 825,761	£ 830,176	£4,415	£827,814	-£2,362	£2,053
3433313	St Monica's Catholic Primary School	£ 1,666,220	£ 1,685,640	£19,420	£1,672,730	-£12,910	£6,510
3433316	St Robert Bellarmine Catholic Primary School	£ 846,072	£ 851,542	£5,469	£849,121	-£2,421	£3,049
3433322	Holy Spirit Catholic Primary School	£ 837,317	£ 838,544	£1,228	£836,428	-£2,116	-£888
3433336	Holy Family Catholic Primary School	£ 833,786	£ 835,148	£1,362	£832,726	-£2,422	-£1,060
3433337	Our Lady of Lourdes Catholic Primary School	£ 1,966,016	£ 1,969,455	£3,439	£1,967,267	-£2,188	£1,251
3433338	St Teresa's Catholic Infant and Nursery School	£ 362,563	£ 365,608	£3,045	£363,590	-£2,018	£1,027
3433339	St Patrick's Catholic Primary School	£ 1,337,088	£ 1,346,166	£9,077	£1,342,150	-£4,016	£5,061
3433342	St John's Church of England Primary School	£ 763,526	£ 764,756	£1,230	£762,430	-£2,326	-£1,096
3433343	St Luke's Halsall Church of England Primary School	£ 802,768	£ 804,101	£1,333	£801,655	-£2,446	-£1,113
3433345	St Nicholas Church of England Primary School	£ 803,667	£ 805,021	£1,354	£802,587	-£2,434	-£1,080
3433351	St George's Catholic Primary School	£ 721,476	£ 729,029	£7,553	£724,012	-£5,017	£2,536
3433353	Great Crosby Catholic Primary School	£ 2,379,976	£ 2,394,642	£14,667	£2,389,437	-£5,206	£9,461
3433354	St Mary's Catholic Primary School	£ 460,779	£ 464,941	£4,162	£462,197	-£2,743	£1,419
3433355	St Edmund's and St Thomas' Catholic Primary School	£ 1,172,466	£ 1,174,466	£2,001	£1,172,134	-£2,332	-£331
3433357	Our Lady Star of the Sea Catholic Primary School	£ 882,318	£ 870,988	-£11,330	£870,951	-£38	-£11,367
3433359	Our Lady of Compassion Catholic Primary School	£ 905,626	£ 907,178	£1,552	£904,762	-£2,416	-£864
3433361	English Martyrs' Catholic Primary School	£ 1,587,822	£ 1,594,635	£6,813	£1,592,357	-£2,278	£4,535
3433362	St Elizabeth's Catholic Primary School	£ 1,503,682	£ 1,521,037	£17,356	£1,509,469	-£11,569	£5,787
3433364	St William of York Catholic Primary School	£ 862,463	£ 868,499	£6,037	£865,580	-£2,919	£3,118
3433366	Our Lady Queen of Peace Catholic Primary School	£ 587,342	£ 585,754	-£1,587	£583,620	-£2,134	-£3,721
3433367	St Gregory's Catholic Primary School	£ 811,757	£ 813,088	£1,332	£810,642	-£2,446	-£1,114
3433368	Ursuline Catholic Primary School	£ 1,544,240	£ 1,546,944	£2,704	£1,544,582	-£2,362	£342
3433369	St Jerome's Catholic Primary School	£ 817,931	£ 826,748	£8,816	£820,964	-£5,784	£3,032
3433374	Holy Rosary Catholic Primary School	£ 1,522,445	£ 1,525,124	£2,679	£1,522,762	-£2,362	£317
3433375	St John Bosco Catholic Primary School	£ 798,978	£ 800,290	£1,312	£797,802	-£2,488	-£1,176
3433376	Bishop David Sheppard Church of England Primary School	£ 972,375	£ 959,757	-£12,619	£959,719	-£37	-£12,656
3433378	Springwell Park Community Primary School	£ 1,709,358	£ 1,689,302	-£20,055	£1,687,988	-£1,314	-£21,370
3433379	Thomas Gray Primary School	£ 926,457	£ 918,853	-£7,604	£917,025	-£1,828	-£9,432
3433380	Trinity St Peter's CofE Primary School	£ 827,291	£ 828,690	£1,399	£826,232	-£2,458	-£1,059
3433382	St Benedict's Catholic Primary School	£ 869,075	£ 870,426	£1,351	£868,100	-£2,326	-£975
3433383	Our Lady of Walsingham Catholic Primary School	£ 888,171	£ 889,491	£1,320	£887,321	-£2,170	-£850
3433384	All Saints Catholic Primary School	£ 1,390,097	£ 1,392,218	£2,120	£1,390,570	-£1,648	£472
3433385	Rimrose Hope CofE Primary School	£ 1,219,648	£ 1,203,469	-£16,180	£1,203,431	-£38	-£16,217
3434110	Meols Cop High School	£ 4,225,569	£ 4,232,009	£6,440	£4,229,509	-£2,500	£3,940
3434611	Savio Salesian College	£ 2,674,531	£ 2,677,687	£3,156	£2,675,187	-£2,500	£656
3434621	Maricourt Catholic High School	£ 5,495,451	£ 5,513,487	£18,036	£5,510,987	-£2,500	£15,536
3434623	Sacred Heart Catholic College	£ 5,125,627	£ 5,156,975	£31,348	£5,146,731	-£10,244	£21,104
3434624	Holy Family Catholic High School	£ 3,771,258	£ 3,776,109	£4,851	£3,773,609	-£2,500	£2,351
3434800	Christ The King Catholic High School and Sixth Form Centre	£ 4,538,197	£ 4,544,368	£6,171	£4,541,868	-£2,500	£3,671

Agenda Item 7

3434000	The Hawthorne's Free School	£ 1,549,347	£ 1,567,439	£18,092	£1,555,609	-£11,830	£6,262
3434001	St Michael's Church of England High School	£ 3,434,873	£ 3,385,661	-£49,212	£3,385,624	-£37	-£49,249
3434002	Hillside High School	£ 4,078,527	£ 4,083,204	£4,677	£4,080,704	-£2,500	£2,177
3434004	Litherland High School	£ 3,464,456	£ 3,506,402	£41,946	£3,478,422	-£27,980	£13,966
3434005	Stanley High School	£ 3,113,722	£ 3,099,587	-£14,136	£3,097,087	-£2,500	-£16,636
3434100	Deyes High School	£ 5,526,755	£ 5,583,901	£57,146	£5,583,901	£0	£57,146
3434101	Formby High School	£ 4,017,495	£ 4,093,539	£76,044	£4,093,539	£0	£76,044
3434105	Chesterfield High School	£ 5,269,317	£ 5,295,582	£26,265	£5,291,017	-£4,565	£21,700
3434106	Range High School	£ 4,551,828	£ 4,647,684	£95,856	£4,647,684	£0	£95,856
3434108	Birkdale High School	£ 3,372,986	£ 3,377,579	£4,593	£3,375,079	-£2,500	£2,093
3434109	Greenbank High School	£ 4,766,431	£ 4,772,949	£6,518	£4,770,449	-£2,500	£4,018
3434113	Maghull High School	£ 3,588,599	£ 3,593,329	£4,730	£3,590,829	-£2,500	£2,230
3433341	St Thomas Church of England Primary School	£ 804,787	£ 806,154	£1,366	£803,064	-£3,090	-£1,724

Local Authority Funding Reform Proforma

LA Name:	Sefton
LA Number:	343

Premises costs to exclude from allocation when calculating the minimum funding level	Mobility No	Rates Yes	PFI No	Split Sites No
Primary minimum per pupil funding level	Middle school minimum per pupil funding level for secondary pupils		Secondary minimum per pupil funding level	
3500			4800	

Pupil Led Factors

Description	Reception uplift		Pupil Units		Sub Total		Total	Proportion of total pre MFG funding (%)	Notional SEN (%)		
	No	Yes	Primary	Secondary	Primary	Secondary			Primary	Secondary	
1) Basic Entitlement Age Weighted Pupil Unit (AWPU)	No		0.00								
Primary (Years R-6)			20,844.00		£63,916,042		£125,461,671	40.80%	10.00%		
Key Stage 3 (Years 7-9)			8,581.00		£37,103,815				10.00%		
Key Stage 4 (Years 10-11)			5,615.00		£24,441,814				10.00%		
Description	Primary amount per pupil	Secondary amount per pupil	Eligible proportion of primary NOR	Eligible proportion of secondary NOR	Sub Total		Total	Proportion of total pre MFG funding (%)	Primary Notional SEN (%)	Secondary Notional SEN (%)	
2) Deprivation							£9,034,034	5.77%			
FSM	£325.00	£1,525.00	3,397.00	2,084.00	£4,282,125				40.00%	40.00%	
FSM6	£0.00	£99.78	5,249.19	4,020.53	£401,169				40.00%	40.00%	
IDACI Band F	£50.00	£100.00	2,165.47	1,475.64	£255,837				40.00%	40.00%	
IDACI Band E	£118.00	£160.00	930.80	631.12	£210,813				40.00%	40.00%	
IDACI Band D	£250.00	£350.00	1,376.59	800.05	£624,166				40.00%	40.00%	
IDACI Band C	£300.00	£460.00	753.28	500.01	£455,989				40.00%	40.00%	
IDACI Band B	£400.00	£500.00	2,298.93	1,429.01	£1,634,077				40.00%	40.00%	
IDACI Band A	£500.00	£795.00	1,093.15	784.00	£1,169,857		40.00%	40.00%			
3) Looked After Children (LAC)	LAC X March 17		268.82		£0		£775,533	0.00%			
4) English as an Additional Language (EAL)	EAL 3 Primary		651.43		£651,428				0.50%	0.00%	
	EAL 3 Secondary		124.11		£124,106					0.00%	
5) Mobility	Pupils starting school outside of normal entry dates		88.80		£0			0.00%			
Description	Weighting	Amount per pupil	Percentage of eligible pupils	Eligible proportion of primary and secondary NOR respectively	Sub Total		Total	Proportion of total pre MFG funding (%)	Primary Notional SEN (%)	Secondary Notional SEN (%)	
6) Prior attainment							£8,706,099	5.56%			
Low Attainment % new EFSP	100.00%	£860.00	36.42%	6,894.99	£5,929,693				100.00%		
Low Attainment % old FSP 78			15.88%								
Secondary low attainment (year 7)	58.05%		20.11%								
Secondary low attainment (year 8)	48.02%	£1,040.00	21.37%	2,669.62	£2,776,406					100.00%	
Secondary low attainment (years 9 to 11)			17.50%								

Other Factors

Factor	Lump Sum per Primary School (£)	Lump Sum per Secondary School (£)	Lump Sum per Middle School (£)	Lump Sum per All-through School (£)	Total (£)	Proportion of total pre MFG funding (%)	Notional SEN (%)		
7) Lump sum	£120,000.00	£120,000.00			£11,160,000	7.12%	0.00%	0.00%	
8) Sparsity factor					£0	0.00%			
Please provide alternative distance and pupil number thresholds for the sparsity factor below. Please leave blank if you want to use the default thresholds. Also specify whether you want to use a tapered lump sum for one or both of the phases.									
Primary distance threshold (miles)		Primary pupil number average year group threshold		Fixed or tapered sparsity primary lump sum?	Fixed				
Secondary distance threshold (miles)		Secondary pupil number average year group threshold		Fixed or tapered sparsity secondary lump sum?	Fixed				
Middle schools distance threshold (miles)		Middle school pupil number average year group threshold		Fixed or tapered sparsity middle school lump sum?	Fixed				
All-through schools distance threshold (miles)		All-through pupil number average year group threshold		Fixed or tapered sparsity all-through lump sum?	Fixed				
9) Fringe Payments					£0	0.00%			
10) Split Sites					£0	0.00%			
11) Rates					£1,317,546	0.84%			
12) PFI funding					£0	0.00%			
13) Exceptional circumstances (can only be used with prior agreement of ESFA)									
Circumstance					Total (£)	Proportion of total pre MFG funding (%)	Notional SEN (%)		
Additional lump sum for schools amalgamated during FY18-19					£0	0.00%	0.00%	0.00%	
Additional sparsity lump sum for small schools					£0	0.00%			
Additional funding under the minimum per pupil level of funding factor					£0	0.00%			
Exceptional Circumstance4					£0	0.00%			
Exceptional Circumstance5					£0	0.00%			
Exceptional Circumstance6					£0	0.00%			
Exceptional Circumstance7					£0	0.00%			
Additional funding to meet minimum per pupil funding level					£209,018				
Total Funding for Schools Block Formula (excluding MFG Funding Total) (£)					£156,663,901	100.00%	£24,865,879		

14) Minimum Funding Guarantee			-1.50%	#VALUE!	
Apply capping and scaling factors? (gains may be capped above a specific ceiling and/or scaled)			Yes		
Capping Factor (%)	1.25%	Scaling Factor (%)	100.00%		
Total deduction if capping and scaling factors are applied					
				#VALUE!	
				Total (£)	Proportion of Total funding(%)
MFG Net Total Funding (MFG + deduction from capping and scaling)				£216,106	0.14%
High Needs threshold (only fill in if, exceptionally, a high needs threshold different from £6,000 has been approved)					
Additional funding from the high needs budget				£0.00	
Growth fund (if applicable)				£150,000.00	
Falling rolls fund (if applicable)				£0.00	
Total Funding For Schools Block Formula					
				£156,880,007	
% Distributed through Basic Entitlement				80.08%	
% Pupil Led Funding				91.90%	
Primary: Secondary Ratio				1 : 1.28	

Total funding for schools block formula contains funding from outside of the 2019-20 Schools Block allocation?	No
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Local Authority Funding Reform Proforma

LA Name:	Sefton
LA Number:	343

Total DSG schools block allocation	
Total Funding For Schools Block Formula as a percentage of DSG schools block allocation	

Premises costs to exclude from allocation when calculating the minimum funding level	Mobility	Rates	PFI	Split Sites
	No	Yes	No	No
Primary minimum per pupil funding level	Secondary (KS3 only) minimum per pupil funding level		Secondary (KS4 only) minimum per pupil funding level	
£3,500.00			£4,800.00	

Pupil Led Factors

Reception uplift		No	Pupil Units		0.00				
Description	Amount per pupil	Pupil Units		Sub Total	Total	Proportion of total pre MFG funding (%)	Notional		
1) Basic Entitlement Age Weighted Pupil Unit (AWPU)	Primary (Years R-6)	£3,066.40	20,844.00		£63,916,042	£125,461,671	40.86%		
	Key Stage 3 (Years 7-9)	£4,323.95	8,581.00		£37,103,815		23.72%		
	Key Stage 4 (Years 10-11)	£4,352.95	5,615.00		£24,441,814		15.62%		
Description	Primary amount per pupil	Secondary amount per pupil	Eligible proportion of primary NOR	Eligible proportion of secondary NOR	Sub Total	Total	Proportion of total pre MFG funding (%)	Primary Notional SEN (%)	
2) Deprivation	FSM	£331.00	£1,525.00	3,395.00	2,084.00	£4,301,845	£9,053,754	5.79%	
	FSM6		£99.78	5,249.19	4,020.53	£401,169			
	IDACI Band F	£50.00	£100.00	2,165.47	1,475.64	£255,837			
	IDACI Band E	£118.00	£160.00	930.80	631.12	£210,813			
	IDACI Band D	£250.00	£350.00	1,376.59	800.05	£624,166			
	IDACI Band C	£300.00	£460.00	753.28	500.01	£455,989			
	IDACI Band B	£400.00	£500.00	2,298.93	1,429.01	£1,634,077			
	IDACI Band A	£500.00	£795.00	1,093.15	784.00	£1,169,857			
3) Looked After Children (LAC)	LAC X March 17			268.82	£0	£775,533	0.00%		
4) English as an Additional Language (EAL)	EAL 3 Primary	£1,000.00		651.43	£651,428		0.50%		
	EAL 3 Secondary		£1,000.00		124.11		£124,106		
5) Mobility	Pupils starting school outside of normal entry dates			88.80	602.00	£0	0.00%		
Description	Weighting	Amount per pupil	Percentage of eligible pupils	Eligible proportion of primary and secondary NOR respectively	Sub Total	Total	Proportion of total pre MFG funding (%)	Primary Notional SEN (%)	
6) Prior attainment	Low Attainment % new EFSP	100.00%	£860.00	36.42%	6,894.99	£5,929,693	£8,706,099	5.56%	
	Low Attainment % old FSP 78			15.88%					
	Secondary low attainment (year 7)	58.05%	£1,040.00	20.11%	2,669.62	£2,776,406			
	Secondary low attainment (year 8)	48.02%		21.37%					
	Secondary low attainment (years 9 to 11)			17.50%					

Other Factors

Factor	Lump Sum per Primary School (£)	Lump Sum per Secondary School (£)	Lump Sum per Middle School (£)	Lump Sum per All-through School (£)	Total (£)	Proportion of total pre MFG funding (%)	Notional
7) Lump Sum	£117,500.00	£117,500.00			£10,927,500	6.98%	
8) Sparsity factor					£0	0.00%	

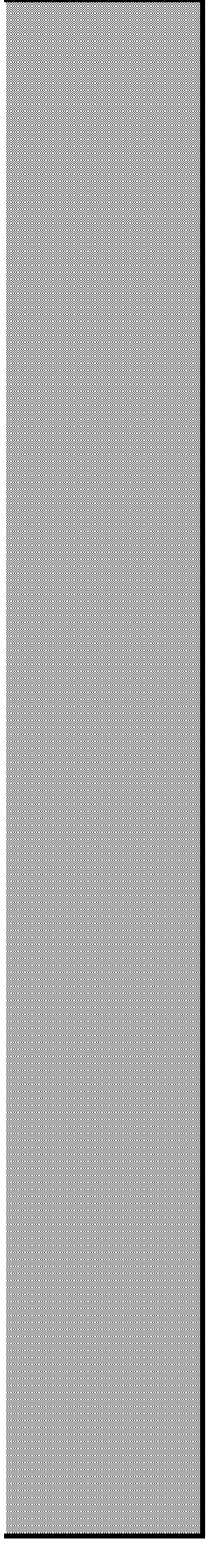
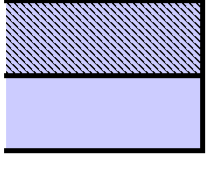
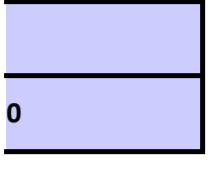
Please provide alternative distance and pupil number thresholds for the sparsity factor below. Please leave blank if you want to use the default thresholds. Also specify whether you want to use a tapered lump sum or the NFF weighting for any of the phases.

Primary distance threshold (miles)	Primary pupil number average year group threshold	Fixed, tapered or NFF sparsity primary lump sum?	Fixed
Secondary distance threshold (miles)	Secondary pupil number average year group threshold	Fixed, tapered or NFF sparsity secondary lump sum?	Fixed
Middle schools distance threshold (miles)	Middle school pupil number average year group threshold	Fixed, tapered or NFF sparsity middle school lump sum?	Fixed
All-through schools distance threshold (miles)	All-through pupil number average year group threshold	Fixed, tapered or NFF sparsity all-through lump sum?	Fixed
9) Fringe Payments		£0	0.00%
10) Split Sites		£0	0.00%
11) Rates		£1,303,873	0.83%
12) PFI funding		£0	0.00%

13) Exceptional circumstances (can only be used with prior agreement of ESFA)

Circumstance	Total (£)	Proportion of total pre MFG funding (%)	Notional
Additional lump sum for schools amalgamated during FY18-19	£0	0.00%	0.00%
Additional sparsity lump sum for small schools	£0	0.00%	
Exceptional Circumstance3	£0	0.00%	
Exceptional Circumstance4	£0	0.00%	
Exceptional Circumstance5	£0	0.00%	

Exceptional Circumstance6		£0	0.00%	
Exceptional Circumstance7		£0	0.00%	
Total Funding for Schools Block Formula (excluding minimum per pupil funding level, funding floor protection and MFG Funding Total)		£156,228,430	99.86%	£
14) Additional funding to meet minimum per pupil funding level		£216,518		
Total Funding for Schools Block Formula (excluding funding floor protection and MFG Funding Total)		£156,444,948	100.00%	£
15) Funding floor protection (select Yes if applying this protection)		No	£0	
Total Funding for Schools Block Formula (excluding MFG Funding Total)		£156,444,948		
16) Minimum Funding Guarantee		-1.50%	#VALUE!	
Apply capping and scaling factors? (gains may be capped above a specific ceiling and/or scaled)		Yes		
Apply alternative gains cap for schools gaining more than 15%?		No		
Capping Factor (%)	0.41%	Scaling Factor (%)	100.00%	
Total deduction if capping and scaling factors are applied		#VALUE!		
		Total (£)	Proportion of Total funding(%)	
MFG Net Total Funding (MFG + deduction from capping and scaling)		£89,017	0.06%	
Total Funding for Schools Block Formula		£156,533,966		
High Needs threshold (only fill in if, exceptionally, a high needs threshold different from £6,000 has been approved)				
Additional funding from the high needs budget				
Growth fund (if applicable)				
Falling rolls fund (if applicable)				
Other Adjustment to 18-19 Budget Shares		£0		
Total Funding For Schools Block Formula (including growth and falling rolls funding)		£156,533,966		
% Distributed through Basic Entitlement		80.20%		
% Pupil Led Funding		92.04%		
Primary: Secondary Ratio		1 :	1.28	
Total funding for schools block formula contains funding from outside of the 2019-20 Schools Block allocation?		No		



National Fair Funding Conference - 18 October 2018

Schools Funding: Future Challenges and Opportunities - Tom Goldman, Deputy Director of Education, Funding Policy Unit, DfE

- NFF been in operation 200 days
- 20,198 notional NFF school allocations for 2019/20
- 150 local authorities (149 for April)
- 504,950 data points in the schools NFF summary spreadsheet
- £42.4 billion in the Core Schools budget in 2018/19, £43.5 billion in 2019/20
- 5.2% of total public spending

Significant shift locally towards, or to mirror, NFF values. 73 local authorities moved all factor values towards the NFF. 41 matched NFF factor values almost exactly. 112 introduced a minimum per pupil funding level (and for 23 more, it would have no effect).

Major change in 2018/19 but not as many in 2019/20 and does not expect many in 2020/21.

Of every £1 collected in taxes 5 pence goes to schools.

December final allocations for 2019/20. Soft formula for 2020/21. No decision for Soft or Hard formula 2021/22. Outcome of Spending Review will affect formula.

Beyond the NFF:

- **Teachers' Pay Grant (from September 2018)**
- £187m in 2018/19 (7 months); £321m in 2019/20 (12 months); full cost of the award over an assumed 1%
- Maintained schools, academies, special schools. Based on pupil numbers/place numbers
- **Teachers' Pensions Grant (from September 2019)**
- c£800m in 2019/20 (7 months); full cost of the additional employers' pensions contributions
- Maintained schools, academies, special schools, colleges
- Precise total and best distribution mechanism to be determined

Spending Review 2019 - school funding remains firmly in the public spotlight, especially - but not solely - the size of the quantum; and increasingly high needs as well as schools. No budgets currently set beyond 2019/20. Do not know when the Spending Review will take place. Treasury may also do one year review. There are many competing demands - in education (eg 16-19); across government. Schools have seen the smallest overall squeeze since 2010 compared with GPs, hospitals, adult and children's social care, LA neighbourhood services, Police, Courts and Pensions - information from the Institute of Government Performance Tracker 2018. Schools have been protected compared with LAs.

Cost pressures - pay, inflation, recruitment and retention. Talking to the Treasury about the pressure on High Needs. Increasing complexity of need. Have to show Treasury that we are removing perverse incentives - incentives driving up costs without seeing improvements.

Agenda Item 8

The state of school funding: trends and challenges - Natalie Perera, Executive Director & Head of Research, Education Policy Unit.

Overall funding contract - spending per pupil frozen 2017/20. Secondary lower than in 2011.

Around 60% of schools are spending more than their income. In the North West over 25% of secondary schools in deficit.

Only 60% of teachers remain in state funded schools and only 50% of maths and physics teachers. Less than half of maths and physics teachers do not have a degree in the subject.

Three quarters of teachers time spent teaching.

National Funding Formula for Schools - Helen Alderton and Andrew Hackett, Funding Policy Unit, DfE

Update 2019/20 - Minimum pupil funding £4,800 Secondary and £3,500 Primary. Funding floor 1% gain per pupil.

Growth funding 2019/20 - £2,050 Secondary and £1,370 Primary. Protection minus 1/2% schools block. Growth fund based on actual growth that LA experience, rather than the amount they have historically chosen to spend.

The system relies on an ongoing LA role.

Deprivation - increased to 8.2% in 2018/19 compared to 7.7% in 2017/18

Considerable variation in the proportion of schools block funding which LAs are allocating to schools through the deprivation factor. A number of LAs are not using the combination of IDACI and/or FSM that is used in the NFF. Some LAs are not using all the IDACI bands (A - F) and a very small number not using IDACI at all. Some LAs not allocating for FSM, some not for FSM6 and a very small number not using either.

2018/19 Lump sum - large shift in the distribution of the lump sum values used, with most LAs choosing to use the NFF amount of £110,00 or a value close to it. Overall the LAs are allocating a slightly lower lump sum to the schools block.

2018/19 Sparsity - 50 LAs using sparsity factor compared to 25 in 2017/18.

2018/19 minimum pupil level - 112 used the factor.

50% used the 2018/19 NFF transitional per pupil rate of £3,300: the same % used the secondary rate of £4,600.

48 LAs chose not to implement minimum per pupil levels or implemented them at lower levels than the NFF.

Replacing the School Financial Value Standard - Emily Nunn, Funding Policy Unit DfE.

The DfE has recently published a new school resource management self-assessment tool. The initial version is targeted at academies but a maintained school version will be published in the new year with the view to it replacing the School Financial Value Standard. The session included a demonstration of the tool.

This tool will support governors and trustees and help with benchmarking. The dashboard is data based. It is an Excel based product and each section has a link through to the guidance. A school will be able to compare at the press of a button with statistically similar schools.

It will give Red, Amber, Green and Purple ratings. Green 60-80% of similar schools, Red out of line, Amber quite a lot out of line, Green in line, Purple lower % of similar schools. Tool does not take into account SEN or EAL.

Dashboard will compare Academies and Maintained schools and should be fully operational by May 2020. The self assessment tool is an improvement and will provide LAs with a master view. LA feedback so far is that it is an improvement.

Hilary Wood - Head of Business Support and Resources Blackpool Council.

Balancing the High Needs Budget

LA that were in overall deficit on their DSG:

- 2016/17 - 17
- 2017/18 - 22
- 2018/19 - 40 - £140 million

Funding gap on the High Needs Block:

- 2014/15 - £127 million
- 2017/18 - £409 million

Percentage of pupils with EHC Plan attending a mainstream school:

- 2016 - 52%
- 2017 - 50%
- 2018 - 47%

EHCs increasing - when cutting done it is in pastoral support who help with additional needs. Teacher training only 1/2 day on SEND and then into the classroom.

How can we close the gap? Giving mainstream schools the money they would have spent on out of borough to help with transport etc.

How are Blackpool closing the gap? Reviewed resourced provision units - closed 2 PD units, paying mainstream schools the top up based on needs. Reviewing remaining primary behaviour units and considering need for additional units based on recommendations of HN provision review. They have tightened up Fair Access. PRU being used for respite and then back to mainstream. Placed pupils with EHCP in PRUs instead of out of borough. Putting some home-to-school support workers in.

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