

**BCP SCHOOLS FORUM**

**TUESDAY, 5 NOVEMBER, 2019**

Present: Phil Keen (Corfe Hills School) - **Chairman**  
Patrick Earnshaw (Highcliffe School) - **Vice - Chairman**

Russell Arnold, The Quay School  
Mark Avoth, The Bourne Academy  
Andy Baker, Poole Grammar School  
Kate Carter, TEACH Academy Trust  
Jon Chapple, Twynham Primary  
Geoff Cherrill, Winchelsea School  
Ben Doyle, St Peter's School  
Linda Duly, Cuddles Day Nursery  
Brigid Hincks, St Joseph's Primary School  
Jason Holbrook, Avonbourne Girls Academy  
Sue Johnson, Jack in the box Bournemouth  
David Newman, Poole High School  
Jeremy Payne, St James' CE School  
Sean Preston, Hamwic  
Andrew Reeks, Bournemouth & Poole College  
Michael Reid, Ambitions Academy Trust (substituted by Sian Thomas)  
Dave Simpson, The Epiphany School

Also in attendance: Councillor David Brown, BCP Council  
Councillor Sandra Moore, BCP Council

Officers in attendance: Jack Cutler – Planning and Statistics Officer – BCP Council  
Julian Radcliffe – Service Director – Inclusion & Family Services- BCP Council  
Nicola Webb – Assistant Chief Finance Officer – BCP Council

25. Introduction

The Chair opened the meeting and welcomed all present.

26. Apologies for Absence

None.

27. Declarations of Interest

There were no declarations of disclosable pecuniary interests

28. Minutes of the Previous Meeting

**RESOLVED that the Minutes of the Meeting held on 25 September 2019, having been previously circulated, be taken as read, signed and confirmed by the Chairman as a correct record.**

It was noted that all other matters arising are covered in the agenda.

29. Dedicated Schools Grant (DSG) Funding Announcements for Bournemouth, Christchurch and Poole (BCP) 2020-21

Nicola Webb, Assistant Chief Finance Officer, BCP Council, presented the report.

Since the paper was written the early years announcements had been made and these gave an increase for 2, 3 and 4 yr. olds. The department have increased the rate by 8p per hour. It was noted that the pre-school Learning Alliance had challenged the Government funding rates and had been successful and the details will be published on 15 November 2019.

The National Funding Formula (NFF) for mainstream schools was close to what was expected and as reported at the September meeting.

There is an increase of 8.8% to High Needs which is slightly higher than expected. This was due to the higher demographic growth that the department uses for their calculations.

There will be a 2.5% reduction to the Central Services block for on-going LA duties. The reduction for historic commitments is 20% which looks like this will be phased out over 5 years (but nothing has yet been indicated by the DfE).

**RESOLVED that the report was noted.**

30. Mainstream Schools Formula 2020-21 Proposals for Consultation

Jack Cutler, Quality and Commissioning, BCP Council, presented the report.

At the last meeting the data was provisional but there is now more certainty on the figures as detailed information and clarifications have been received.

There has been a significant change to the Minimum Per Pupil Funding Levels (MPPFL). The formula factors have received a significant increase of 4% excluding Free School Meals (FSM). Minimum Funding Guarantee (MFG) has been applied against the 19/20 NFF allocations rather than against the individual school's budget distribution formula. The MFG in the local formula protects against last year's actual funding rates.

As there was transfer between blocks last year this meant that school allocations were slightly below NFF. This and other vagaries in the formula

methodology mean there is £100,000 surplus after all schools have been allocated NFF allocations for 2020/21. This could be transferred to high needs or for distribution to mainstream schools. The Growth Funding has not been announced yet.

It was explained that in 19/20 the NFF had been scaled back for the transfer to the High Needs Block through various levers – MFG, cap, MPPFL and levels of the Basic Entitlements.

It was noted that the MPPFL is expected to be used as a mandatory factor in 20/21 and set at the level of the NFF. To reduce these a disapplication request will be needed with this linked to affordability as Ministers want these levels to be achieved as a matter of policy.

MFG can be set between +.5 and +1.84% which will see an increase against last years figures. There has been an increase of 4% in the formula rates for most factors. There is no cap in the NFF 20/21 but a cap can apply to the LFF.

In 2019/20 the NFF was adjusted in 4 ways to achieve a funding level for transfer. The MFG could be varied and scaled back. Formula schools funding could be based on a decision to scale all formula factors or only the basic entitlement, the maximum scaling would be when all formula schools can be put onto the MFG. It was noted another option was to set a gains cap all formula schools and this will target those who have the largest gains. The last option was to scale back the MFPPL from the NFF rates but note this requires the DfE to agree.

There have been changes in the formula factors for 2020/21. The data from 3 census details have been used to determine mobility in a new formulaic way. This has allocated more money to BCP. It will be £400,000 compared to £50,000. Mobility funding will be included in the MPPFL not on top.

It was questioned how many schools in BCP would be impacted by the changes to the mobility factor. It was estimated that 10 schools would be impacted. The threshold for mobility has been lowered with more schools now qualifying in the LFF.

Table 3 shows the indication of the NFF allocations when applied through the LFF based on the October 18 census pupil numbers and characteristics which could be subject to change when the October 19 census details are received in December. There will be larger gains in the Primary phase area due to the larger increase in MPPFL.

About 40% of primary and 1/3 secondary schools have protection on the MPPFL. The schools that are on Minimum Funding Guarantee (MFG) have reduced as funding rates have increased by 4%, lifting more schools on to the formula.

It was confirmed that Table 5 showed an indication of the indicative amounts that could be transferred to the HNB. It was noted that Table 6

shows the effect of varying the MPPFLs. A disapplication would need to be applied for to achieve this outcome. Table 7 shows the impact of variable Funding Gains Cap. Some schools could see a gain of 10%.

Table 9 shows the impact of scaling back the basic entitlement factor with the MFG at 1.84%. If this was scaled back to 0.5% table 10 shows the impact and how much funding could be released. Table 11 indicates the different ways to transfer to the HNB similar to last year.

It was clarified that there were 2 options. The Forum to be consulted based on the principles outlined in the report. A sub-group could be established to look at the funding formula in more detail.

It was acknowledged that there was the intention that there will be a school funding consultation based on the report to look at potential transfer. Schools will be consulted on the principles outlined in the report.

It was noted that the requirements for the disapplication vary. There will be MFG protection for one school equal to 20% of its annual budget and this could be reduced through a disapplication request to DfE.

Option 2 would see a lower MFG set. 10% of schools would see a more significant reduction. 0.5% of the amount would go to the HNB. The disapplication requirements would not apply to this option. Growing all through schools (adding primary year groups) require a different MFG calculation to avoid over protection of funding at the higher secondary level. The MFG baseline pro-forma from the DfE is used but it still requires formal approval by the DfE. This has been approved by the Forum previously.

It was confirmed that both options would need a disapplication request. It was noted that the view from Central Government that you must have a strong case to vary funding levels.

A question was asked regarding the expectation that a further transfer would be required for 2020-21. Nationally it was noted that the DfE's position is that they have provided additional funding allocated to the HNB. This could be sufficient for the DfE to block disapplication's. Locally there is significant budget pressure and the amounts are not enough to create a balanced budget. It was considered that there is not sufficient funding and a balance will be required. It was suggested that an affordability issue may be grounds that the DfE may consider.

The Deficit Recovery Plan drawn up in June assumed the DSG could be balanced in-year only with significant extra funding from the DfE and with 0.5% transfers from mainstream schools continuing.

It was noted that there is an alternative to transfer to decrease the need for HNB. It was confirmed that the transfer was not addressing the under lying issue. The DfE are looking to legislate to include that Councils are not responsible for clearing the DSG deficit and should not top up the annual budget without express approval from the Government. A consultation is

currently live with the outcome now after the election. It was questioned that if the LA was not responsible for the deficit and paying it back, who was?

It was put forward that the recovery plan would affect the schools with the largest amounts of SEND the most. It was also suggested that if more of the funding came to the school that the school could help solve the HNB by having the resources in school to deal with it. It was noted that more pupils with EHCP leave mainstream schools as there is a lack of experienced staff to deal with the pupil in school. It was acknowledged that the number of EHCP's have gone up by 50% but there had been cuts to the SEND budget.

It was suggested that the options being put forward were the same as the previous year and that a different approach needed to be considered.

It was agreed that a consultation sub-group be arranged to discuss the options available prior to the consultation. It was confirmed that the LA follows the legislation in the amount that must be transferred.

**RESOLVED that disapplication requests be applied for (but could be withdrawn or amended subsequently following further consultation) by unanimous agreement.**

31. Permanent Exclusion Financial Adjustment: A Revised Proposal

Jack Cutler, Quality and Commissioning, BCP Council, presented the report.

The report comprised a revised proposal for the permanent exclusion financial adjustment. It is based on the statutory minimum and a half way measure on the original proposal. The principle is that the funding follows the pupil. It was explained that if the funding followed the pupil this would contribute to funding Alternative Provision (AP) or for the pupil in the receiving school. The adjustment would follow either the LA financial year or the academy financial year, whichever was applicable.

It was explained that the original proposal was that if a pupil was excluded after October the full additional funding including Pupil Premium (PP) relating to the next financial year would form part of the exclusion charge. The revised proposal states that if a child was excluded after the October census date the funding would be adjusted through the additional factor and the PP funding only (ie not the basic entitlement) for the next financial year. The element funding would be unique to that pupil (and may not apply to any replacement)

It was confirmed that this proposal only applied to additional factors and PP. The basic entitlement would be adjusted from the relevant date in the current financial year only

It was questioned what would happen if a pupil was excluded from an academy and went to a maintained school. It was confirmed that the

financial year end of the receiving school would be considered, and the amount would be pro-rata to the end of the financial year. It was suggested that this would be a disadvantage for the HNB where the pupil is moving from a LA school to an Academy but would be an advantage if the pupil moved from an Academy to a mainstream school.

It was noted that the principle of the money following the pupil was not the basis of any other financial application. It was confirmed that there was a lot of mobility in the authority.

**RESOLVED: Schools Forum voted on the revised proposal. This was passed with 10 votes for, 1 against and 4 abstentions. This would now require a consultation with schools.**

32. High Needs Report

Julian Radcliffe, Service Director Inclusion and Family Services BCP Council, presented the report.

Julian Radcliffe introduced himself and clarified his role within BCP. He noted that there were challenges within his area of responsibility in relation to the HNB. It was confirmed that he wanted to secure strong partnership working between the LA and schools.

It was noted that there remains challenge around vulnerability both within BCP, regionally and nationally and the system as a whole will need to work together to address this.

It was suggested that the report details a complex situation and that some, but not all of the current challenges are external to LA control. The demographic challenge was noted and the fact that the age range for High Needs (HN) had been extended through legislation.

It was clarified that there had been significant pupil growth and there were more children with complex needs due to medical advances. There are also increasing numbers of pupils with autism and SEMH which presents a challenge for schools. It was noted that teachers must be supported to include pupils presenting with challenging behaviour and it was suggested that this was greatest in KS3/KS4.

A large number of pupils are being placed in high cost settings. This is placing a significant demand on the HNB and needs to be addressed as a priority

Concerns were raised about the number of exclusions increasing each year at KS 3 and 4. The number of pupils excluded in BCP is twice the national average. This needs to be understood and also addressed as a priority.

It was noted that there remains a lack of sufficiency in mainstream schools in respect of additionally resourced places. A discussion was held on this issue and it was agreed that sufficiency had to be a priority. Concerns were

raised that the costs would continue to increase if this issue was not addressed.

It was suggested that alongside sufficiency the workforce needed to be supported and with the right support (including a strong WFD offer), so they felt confident and enabled to include vulnerable pupils in schools.

It was confirmed that an increase in specialist services for schools, would also promote the confidence and capability of staff to support pupils with more complex needs .

Issues with the 14+ curriculum were raised. It was felt that a more traditional curriculum was not always a good fit for pupils and this can impact on their overall engagement. Some pupils need a different approach and options need to be explored.

The issue of joint commissioning was raised – in relation to Health engagement and contribution. At this time, these arrangements appear under developed and costs associated with more complex pupils (in particular) sit with Education.

The view was expressed that children do not exist in isolation; rather they exist in a series of systems (i.e. home; school; community) and each of these needs to be stable if children are able to thrive. Future service design will need to ensure a holistic perspective that identifies and supports unmet across these 3 systems.

A culture of inclusion was described as central to future success in this area. This perspective needs to be championed and developed across the partnership.

It was suggested that a more detailed report be produced to show how a different approach would impact on the financial position. It was discussed how the potential financial gains could be achieved through a more inclusive and capable workforce.

It was questioned whether Early Years (EY) would be included? It was confirmed that Amanda Gridley is the lead officer in this area and she would be key in ensuring EY are represented in future developments.

It was suggested that this approach had the potential to affect the forecast depending on how quickly the recommended approach could be put in place. It was pointed out that the HNB could be reduced by meeting the needs of the children in school.

After discussion it was agreed that the DfE needed to understand the unique needs of 3 authorities coming together. This would allow the allocation next year to recognise and allow capital investment to support the suggested plan for the HNB.

**RESOLVED that the report be noted.**

33. Forward Plan

**BOURNEMOUTH, CHRISTCHURCH and POOLE  
SCHOOLS FORUM**

**Forward Plan**

**December 2019**

- Early Years Formula Consultation Outcome
- Mainstream Schools Formula Consultation Outcome
- High Needs Block Financial Strategy Group
- Central School Services Budget 2020-21
- DSG Budget Monitoring 2019-20

**January 2020**

- DSG Settlement and Budget 2020-21
- Growth Fund 2020-21
- Funding Transfer from Schools Block 2020-21
- Maintained Schools Central Retention 2020-21
- Looked After Children Pupil Premium Arrangements 2020-21
- Early Years Formula Consultation Outcome
- Visit from ESFA representative

**June 2020**

- DSG Outturn 2019-20
- High Needs Block Financial Strategy Group
- Scheme of Financing Maintained Schools (if update is required)

34. Dates of Future Meetings

- Wednesday 11 December 2019
- Friday 17 January 2020
- Friday 19 June 2020

35. Any Other Business

Felicity Rise informed the forum about a planet and climate change programme that was being partnered with Bournemouth University. Details would be sent out in due course.

It was noted that there is a meeting on 25 November to discuss SEND and that all Headteachers will be invited.

The Chair thanked all the members for their valued contribution to the discussion.



The meeting ended at 10.00 am

CHAIRMAN