

**Total Membership 25**  
**The Forum is quorate if at least 40% (10) of the members are present**



**London Borough of Waltham Forest**  
**SCHOOLS FORUM**

Day/Date/Time	Venue
Wednesday 18 September 2019 Tea/Coffee and Light Refreshments: 5:00pm Main Meeting: 5:30pm	Council Chambers, 1 <sup>st</sup> Floor, Waltham Forest Town Hall Forest Road Walthamstow E17 4JF
<b>Contact:</b>	<b>Telephone / Email:</b>
<b>Clerk to Schools Forum</b>	<a href="mailto:schoolforum@walthamforest.gov.uk">schoolforum@walthamforest.gov.uk</a>
<b>Maintained Primary Headteacher Representatives (5)</b>	
Kathryn Soulard	Greenleaf Primary School
Kate Jennings	Mission Grove
Lindsey Lampard	Chingford C of E Primary
Linda Adair	Henry Maynard Primary School and Nursery
Ruth Boon	St Joseph's Infants
<b>Primary Academies and Primary Free Schools Representatives (4)</b>	
Amanda Daoud	Lime Trust Larkwood
Anne Powell	Riverley Primary
VACANT (previously Lynne Harrowell)	
Maureen Okoye (Chair)	Davies Lane Primary Academy & Selwyn Primary
<b>Maintained Primary Governor Representatives (1)</b>	
Aktar Beg	Edinburgh Primary
<b>Nursery School Representative (1)</b>	
Helen Currie	Forest Alliance Church Hill & Low Hall Nursery Schools
<b>Maintained Secondary Headteacher Representatives (2)</b>	
Clive Roswell	Willowfield School
VACANT (previously Lynnette Parvez)	
<b>Secondary Academies and Secondary Free Schools Representatives (4)</b>	
Gareth Cross	Connaught School for Girls
John Hernandez	Norlington School and Sixth Form
Rob Pittard	Norlington School and Sixth Form
Jane Benton (previously Mark Morrall)	Chingford and South Chingford Foundation
<b>Maintained Secondary Governor Representative (1)</b>	
Gillian Barker	Walthamstow School for Girls
<b>Special School and Special Academies Representative (1)</b>	
Gary Pocock	Lime Trust Hornbeam
<b>PRU (1)</b>	
Catherine Davis	Hawkswood Group
<b>Non School Members (4)</b>	
<b>Early Years Providers</b>	Sarah Kendrick (Redwood Pre-School)
<b>16-19 Providers</b>	Joy Kettle (Waltham Forest College)
<b>Trade Unions</b>	Steve White (NEU)
<b>Diocesan</b>	Moira Bishop (Brentwood Diocese)

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## AGENDA

<b>Agenda Item</b>	<b>Report Name</b>	<b>Report Authors</b>
1.	Welcome all and Apologies.	Chair
2.	Declarations of Interest	All
3.	Nomination and Election of Vice-Chair	Duncan James-Pike All
4.	Minutes of the Meeting held on 13 February 2019 and Matters Arising	Chair
4a	Decision Sheet from Meeting 13 February 2019	For the record
5.	Early Years Block: Early Years funding formula planning for free education payments for 2, 3 and 4 year olds for 2020-21	Eve McLoughlin
6.	Dedicated Schools Grant Outturn 2018-19	Raina Turner
7.	Schools Forum Membership and Powers	Duncan James-Pike
8.	Forward Plan	Duncan James-Pike
9.	Local Funding Formula 2020-21	Duncan James-Pike
10.	<b>Date of Next Meeting:</b> Wednesday 16 October 2019 5:30pm (Light refreshments from 5:00pm) Council Chambers, Waltham Forest Town Hall	

**MINUTES OF SCHOOLS FORUM MEETING**  
**Tuesday 14<sup>th</sup> May 2019**  
**Council Chambers, Waltham Forest Town Hall**  
**5:30pm – 6:30pm**

<b>ATTENDEES</b>	
Dorinda Ahenkan	Clerk to Schools Forum <a href="mailto:schoolforum@walthamforest.gov.uk">schoolforum@walthamforest.gov.uk</a>
<b>Maintained Primary Headteacher Representatives (5)</b>	
Kathryn Soulard	Greenleaf Primary School
Kate Jennings	Mission Grove
Lindsey Lampard	Chingford CofE Primary
Tracey Griffiths <b>rep.</b> Linda Adair	Henry Maynard Primary School and Nursery
AJ Byleveldt <b>rep.</b> Ruth Boon	St Joseph's Infants
<b>Primary Academies and Primary Free School Representatives (4)</b>	
Amanda Daoud	Lime Trust Larkwood
Anne Powell	Riverley Primary (Not Present)
Lynne Harrowell	Lime Trust Larkwood
Maureen Okoye (Chair)	Davies Lane Primary Academy & Selwyn Primary
<b>Maintained Primary Governor Representatives (1)</b>	
Aktar Beg	Edinburgh Primary (Not Present)
<b>Nursery School Representative (1)</b>	
Helen Currie	Church Hill Nursery School & Low Hall Nursery School (Not Present)
<b>Maintained Secondary Headteacher Representatives (2)</b>	
Clive Rosewell	Willowfield School
Lynnette Parvez (Vice-Chair)	Kelmscott School
<b>Secondary Academies and Secondary Free School Representatives(4)</b>	
Gareth Cross	Connaught School for Girls (Not Present)
John Hernandez	Norlington School and Sixth Form
Mark Morrall	South Chingford Foundation School and Chingford Foundation School
Rob Pittard	Norlington School and Sixth Form (Not Present)
<b>Maintained Secondary Governor Representative (1)</b>	
Gillian Barker	Walthamstow School for Girls (Not Present)
<b>Special School Representative (1)</b>	

Gary Pocock	Hornbeam Academy
<b>PRU (1)</b>	
Bridget Solecka rep. Catherine Davis	Hawkswood Group
<b>Non-School Representatives (4)</b>	
<b>Early Years Providers</b>	Sarah Kendrick (Redwood Pre-School)
<b>16-19 Providers</b>	Stella Fleming rep. Joy Kettle (Waltham Forest College)
<b>Trade Unions</b>	Steve White (NEU) (Not Present)
<b>Diocesan</b>	Moira Bishop (Brentwood Diocese)
<b>LBWF Council Officers</b>	
David Kilgallon	Director of Learning and System Leadership
Duncan James-Pike	Strategic Finance Advisor - Children and Young People Services
Eve McLoughlin	Head of Early Years, Childcare and Business Development
Linzi Roberts-Egan	Deputy Chief Executive
Mohammad Akhtar	Principal Accountant
<b>Observers</b>	
G E Jackson	Willowfield
Joanna Mahadoo	DES
Barbara Thurogood	DES
Elaine Colquhoun	Whitefield
<b>Apologies</b>	
Helen Currie	Church Hill Nursery School & Low Hall Nursery School
Gillian Barker	Walthamstow School for Girls
Anne Powell	Riverley Primary
Aktar Beg	Edinburgh Primary
Gareth Cross	Connaught School for Girls
Rob Pittard	Norlington School and Sixth Form
Steve White	Trade Union, NEU.

**1. Welcome and Apologies**

The Chair welcomed and thanked all for attending this extraordinary meeting. Apologies were noted as above. It was noted Tracey Griffiths is representing Linda Adair, A.J Byleveldt representing Ruth Boon and Bridget Solecka representing Catherine Davis.

**2. Declaration of Interest**

There were no declarations of interest.

**3. Minutes of the Meeting held on 13<sup>th</sup> February 2019 and Matters Arising.**

Amendment to the first question on page 7 to read 'What happens if a Nursery school goes in deficit due to using surplus?'

The remainder of the minutes were approved as an accurate reflection of the meeting. There were no matters arising.

**3a. Decision Sheet from Meeting 13<sup>th</sup> February 2019**

The decision sheet was agreed as an accurate record.

**4. Proposed High Needs Budget 2020-21**

The chair asked the Director of Learning to introduce this item.

It was noted over the last couple of years, there has been an overspend in the high needs block compared to the funding provided. In setting the budget for 2020-21, Schools Forum needs to consider how to address this which by that point would be approximately £4.2 million including deficits brought forward. In order to do that, Schools Forum agreed the Inclusion group continue to meet. The group has now met on four occasions and it is really well attended. All sectors are represented and different ideas about how to tackle the deficit were proposed. The Director of Learning thanked the people that have been involved in the work of the group. It was highlighted the group has been challenging and there has been really good debates.

At these meetings, a range of measures that articulate how we plan to spend the high needs block were put forward. This did not include the accumulated deficit going forwards. There was a real ownership from the group, who have agreed these proposals knowing whatever outcome would affect their budgets. The group agreed to the objective to stay within the funding provided while meeting the needs of all children. The SEN contracts are being progressed which will drive efficiencies

through. Special schools have also made a contribution as any change to high needs funding affects their whole budget.

Primary and secondary schools spend a lot of money of pupils on Level E and F's. A desire from schools was to protect children with the higher level of need. The resource ladder is a system designed to ensure protection is given to pupils with a high level of need and this was agreed by the representatives in the Inclusion group. The group tried to examine all the areas and came up with reasonable proposals.

#### **4.1 Comments, Questions & Responses**

- 4.1.1 Comment / Question: We are not all at the same starting point. There is a 3% rise year on year for PFI costs and schools can't afford it now. Has that been taken into consideration when taking money from the budget?
- 4.1.2 Response: Have not given any weighting to schools in a PFI contract. Whilst those schools are paying higher costs they have better facilities. Do understand PFI contract is proving challenging. This is why the consultation is out there for people to reflect on what should be considered.
- 4.1.3 Question: It was noted Peterborough has a good model. We are working on the premise that if we want teachers, there is no flexibility whatsoever.
- 4.1.4 Response: Can't comment on Peterborough and the way their funding works. When you work in those places, funding system is inconsistent. Schools can submit this response as part of the consultation and include any proposed solutions with it. Officers will consider any proposals and come to a decision afterwards.
- 4.1.5 Question: regarding the consultation, is it one response from each school or more diverse?
- 4.1.6 Response: Officers will take whatever comments come back. The proposal was presented at governors group by Director of Learning last week and they are aware. The point is to do a wide consultation receiving new recommendations not just criticism. This is a collective voice of a lot of people and at the moment, that's where the consensus lies. Schools can tell officers how to improve this model, comments on the content and if anything was missed? If officers receive a response in a particular area, they can take it back to the Inclusion group for further work. There will be a further meeting with SEND parent forum and might organise a workshop for Primary schools. A workshop has also been offered to governors.
- 4.1.7 Question: is the consultation taking the format of an open one or identifying each area and addressing it?

- 4.1.8 Response: The consultation will take an open format. This process has been challenging and was likened to a jigsaw. Changing any pieces of the jigsaw will have a knock-on effect and implications on other parts.
- 4.1.9 Question: What happens with existing level E's when the change happens? How would you defend a challenge from a parent?
- 4.1.10 Response: Schools and Parents need to understand that the lowest funding band in Waltham Forest (Band E) is £8,000. Islington pays £1,200, Enfield pays £2,000. The only other Local Authority who pays closer to what Waltham Forest pays is Newham at £7,000. Upon researching, there was no other Local Authority who paid more in the lowest band than Waltham Forest. Waltham Forest's care plans are not written to a figure but to a child's needs. Within that particular band, that child was allocated £8,000 to care of their needs. It doesn't mean the plan articulates £8,000 worth of support. The proposal for E's is £5,000 which is above the average locally and nationally, not the current £8,000 allocated however; this is a proposal subject to the consultation and later decision-making process.

The Director of Learning met with SEND Parents Forum twice and he feels they understand the concern. They have said they are not happy with any of the changes but accept that we as a whole are 'underfunded' by central government. The objective is to work in a way that stays within the allocated budget of £30 million to spend for high needs. The reality is how as a group we move the jigsaw pieces. The Inclusion group feel the proposals are the most logical way forward and is a model that will meet legal obligations to meet needs.

- 4.1.11 Comment: On Pg. 27, it shows there are 16 children on Level E at Chingford Foundation.
- 4.1.12 Response: Chingford Foundation's core number of places is 10 however at the moment, they have 30 children. That has grown over the past few years. This is the biggest example of over placing in unit, but we do not intend to commission more than the core number of places currently.
- 4.1.13 Comment: Observation is not about core numbers which relate to need but rather the impact on the large number of E's. Number is quite staggering for 1 school and there are those schools where the change will have high impacts on.
- 4.1.14 Response: At one point, the Inclusion group talked about resource provision and a way of protecting those children. There were two outliers with one being Chingford Foundation. The group will consider issues like this through the consultation
- 4.1.15 Comment: The Chair stated as a head of resource provision, not asking for any protection. Don't agree there should be additional protection for any other.

4.1.16 Comment: Fascinated about Islington's Level E amount and whether they reduced it. This is something to consider as it's about how we approach the issue as it's incredibly complex.

4.1.17 Response: Don't know whether Islington reduced the amount or not.

## 4.2 Recommendations

Schools Forum to **agree**:

4.2.1 That the proposed consultation document appended to this report shall be consulted on from 15<sup>th</sup> May to 12<sup>th</sup> June 2019 and that the consultation will include meetings with parents and governors.

### VOTE

Agree: 16

Against: 0

Abstention: 0

4.2.2 That the outcome of the consultation and final proposals will be reported back to Schools Forum on 19<sup>th</sup> June 2019.

### VOTE

Agree: 16

Against: 0

Abstention: 0

## 4.3 Comments, Questions & Responses

4.3.1 Comment: In relation to consultation meetings with governors, wondered if consultation with this group is appropriate? Whether it should be with all Head teachers in general or if its head teachers represented at School Forum's job to inform governors. It might be useful for all Head teachers to hear this information directly from officers.

4.3.2 Response: Officers could go through the Secondary Head Teachers group which every school is represented at.

4.3.3 Comment: Also to consider whether schools want a joint meeting.

4.3.4 Response: There is a Secondary Head Teachers meeting with Linzi and the High Needs Budget consultation is on the agenda. Should schools prefer specific meetings, this can be accommodated. Should they prefer a meeting for all Head Teachers; officers can do a blanket invite to all schools.



- 4.3.5 Comment: Secondary Head Teachers will prefer a meeting with all schools.
- 4.3.6 Comment: The consultation is with parents' groups and Head Teachers but is wider than that.
- 4.3.7 Response: If there are no objections for a meeting to be convened for all schools, officers will arrange two sessions on the same day. One in the morning at approx. 10am and the other in the afternoon at approx. 4pm.
- 4.3.8 Comment: Although this has been a painful process; what was helpful with collective learning was to look at every budget line and the traditional things that were continuing have been questioned. That has set a good precedent for the future and Schools Forum ought to be looking at that in future and whether we are receiving good value for the allocations we get.
- 4.3.9 The Chair echoed thanked all those who participated in the Inclusion group and noted what's important to everyone is that Schools Forum put the children first.

## **5. Date of Next Meeting**

Wednesday 19<sup>th</sup> June 2019, 5:30pm (Light refreshments from 5:00pm). Council Chambers, Waltham Forest Town Hall.

**Schools Forum 14 May 2019**

**Summary of Decisions**

**Item 4**      **Proposed High Needs Budget 2020-21**

**2.1**            **Schools Forum to agreed:**

2.1.1            That the proposed consultation document appended to this report shall be consulted on from 15 May to 12 June 2019 and that the consultation will include meetings with parents and governors.

2.1.2            That the outcome of the consultation and final proposals will be reported back to Schools Forum on 19 June 2019.

Meeting / Date	<b>SCHOOLS FORUM 18 September 2019</b>	Agenda Item	<b>5</b>
Report Title	<b>Early Years Block: Early Years funding formula planning for free education payments for 2, 3 and 4 year-olds for 2020-21</b>		
Decision/Discussion/ Information	For Discussion and Decision by all		
Report Author/ Contact details	<b>Eve McLoughlin, Head of Early Years, Childcare &amp; Business Development Service</b> <b>Tel: 020 8496 3576</b> <a href="mailto:eve.mcloughlin@walthamforest.gov.uk">eve.mcloughlin@walthamforest.gov.uk</a>		
Appendices	<b>Appendix A:</b> E-Mail to early years providers regarding Early Years Task and Finish Group, 9 September 2019		

## 1. SUMMARY

1.1 This report sets out the proposed plan for the development of the early years funding formula for free education payments for 2, 3 and 4 year-olds for 2020-21.

## 2. RECOMMENDATIONS

### 2.1 Schools Forum to agree:

2.1.1 That the proposed timeline set out in Table 1 should form the basis of development of the 2020-21 early years funding formula (EYFF).

2.1.2 That an Early Years Task and Finish Group (EYTFG) be established as set out in Appendix A to review and make recommendations on:

- The 2020-21 Early Years Block funding;
- The wider consultation with all FEEE providers regarding the 2020-21 Early Years Funding Formula (EYFF) for 2, 3 and 4 year-olds; and
- The 2020-21 provider EYFF hourly payment rates for 2, 3 & 4 year-olds member to 5.

### 2.2 Schools Forum to note:

2.2.1 The DfE's EYNFF operational guidance states that at least 95% of the Early Years Block funding of the DSG in respect of three and four year olds MUST be passed through to providers.

### **3. REASON**

- 3.1 The LA is required to consult annually with Schools Forum on arrangements for Early Years provision.

### **4. BACKGROUND**

- 4.1 The DfE/ESFA have not yet published Early Years Block budget allocations for 2019-20. Allocation are usually published around mid-December.
- 4.2 The September 2019 spending review announced that the Government will increase early years spending by £66 million to increase the hourly rate paid to childcare providers through the government's free hours offer. It is not clear at this point how much will be allocated to Waltham Forest or whether this hourly rate increase will apply so some or all of the hourly rates. Further information will be published at a later date
- 4.3 The LA are not anticipating any changes for 2020-21 to the current Early Years National Funding Formula (EYNFF) operational guidance.

### **5. PROPOSED PLAN FOR THE DEVELOPMENT OF THE 2020-21 EYFF**

- 5.1 The proposed plan is outlined below in the table below:

<b>Date</b>	<b>Action</b>
9 September 2019	Expressions of interest sought from all providers of free early education to become a member of the EYTFG. (Appendix A)
27 September 2019	Closing Date for expressions of interest for EYTFG
16 October 2019	EYTFG members announced in The Hub newsletter
16 October 2019	First meeting of the EYTFG
Mid-December 2019	Publication by DfE/ESFA of provisional 2020-21 Early Years DSG block allocations
18 December 2019	Second meeting of the EYTFG
15 January 2020	Report to Schools Forum on the indicative modelling for 2020-21 EYFF
16-24 January 2020	On line consultation with all FEEE providers on the proposed EYFF and group question and answer sessions run for providers
27-31 January 2020	Analysis of consultation responses
5 February 2020	Final meeting of the EYTFG
13 February 2020	Report to Schools Forum on the proposed EYFF 2020-21 for approval

## **6. CONSULTATION**

- 6.1 An online consultation is planned between 16 and 24 January 2020. Providers will be made aware of the consultation via the Early Years newsletter on the Hub website. In addition, e-mails will be sent to all Chairs of Governors, Headteachers and Ofsted registered PVI sector providers advising them of the consultation as well as a link to the online survey.
- 6.2 Q&A sessions will also be held during the consultation week which providers can attend should they wish to.
- 6.3 EYTFG members will also be required to make their respective sector aware of the consultation and encourage them to respond. A hard copy of the consultation questions will be made available to enable respondents to discuss and agree a collective response before submitting their answers online.

## APPENDIX A

### E-mail regarding Early Years Task and Finish Group, 9 September 2019

#### HAVE YOUR SAY ON EARLY YEARS FUNDING IN 2020/21

#### DEADLINE FOR RESPONSE FRIDAY 27 SEPTEMBER

Schools FAO: Governors/Directors, Headteachers, Early Years Foundation Stage Leads and School Business Managers

PVIs FAO: Managing Directors / Chairs of Trustees / Sole Traders / Operation Managers and Finance Officers

Dear All,

In line with the LA's statutory duty and as notified to the Borough's Schools Forum, I will be setting up and chairing an Early Years Task and Finish Group with FEEE providers across all sectors.

The remit of this group will be to **review and make recommendations on:**

- The Early Years Block 2020-21 funding;
- The wider consultation with all FEEE providers regarding new 2020-21 Early Years National Funding Formula (EYNFF) for 2, 3 & 4 year-olds;
- The 2020-21 Early Years National Funding Formula (EYNFF) hourly payment rates for 2, 3 & 4 year-olds

In order to ensure the effectiveness of the group it is important that we have diverse membership across range of roles within schools/settings. We are hoping to achieve 10% representation from the sector currently delivering FEEE places, this equates to the following number of representatives from each sector:

- 3 Maintained Schools (including Maintained Nursery Schools)
- 2 Academies
- 3 to 4 PVI term time providers
- 3 to 4 PVI year-round / full day-care providers (open more than 38 weeks per year and open between 8am and 6pm as a minimum)
- 5 Childminders

Expressions of interest to be part of this group are invited from Senior Leaders from School and PVI sector providers who:

- Are fully up to date with their Headcount returns, in line with the FEEE Financial procedures; and
- Have a good working knowledge of early years funding.

Members will be expected to disseminate information from the Early Years Task and Finish group to their respective sector and to collate their views for presentation at the Early Years Task and Finish Group. The membership of this group will also include LBWF service managers and officers.

**We encourage those of you who provide free early education places to 2, 3 & 4 year-old children to become actively involved to ensure that your sector is truly represented and your opinions are heard.**

Representatives will be expected to be able to attend all meetings between December 19 and February 20, so please do not express an interest in becoming a part of this group if you are unable to commit to attendance during this period.

**Key dates:**

- 10am to 1pm Wednesday 16 October 2019
- 10am to 1pm Wednesday 18 December 2019
- 10am to 1pm Wednesday 5 February 2020

**All expressions of interest should be returned by email no later than midnight on FRIDAY 27 SEPTEMBER to [childcare@walthamforest.gov.uk](mailto:childcare@walthamforest.gov.uk)**

If we have more applicants than available places on the group, applicants will be asked to provide a pen portrait of no more than 200 words to be circulated to all FEEE providers to decide on electing a representative for that group. The vote will take place on 1 and 2 October. The final group members will be announced on Wednesday 16 October.

Kinds Regards,

Eve McLoughlin, Head of Early Years Childcare and Business Development

LONDON BOROUGH OF WALTHAM FOREST

Meeting / Date	<b>SCHOOLS FORUM</b> <b>18 September 2019</b>	Agenda Item	<b>6</b>
Report Title	<b>Dedicated Schools Grant Outturn 2018-19 &amp; 2019-20 updates</b>		
Decision/ Discussion/ Information	For Information		
Report Author/ Contact details	Duncan James-Pike; Strategic Advisor <a href="mailto:Duncan.James-Pike@walthamforest.gov.uk">Duncan.James-Pike@walthamforest.gov.uk</a> 0208 496 3502  Raina Turner: Head of Education Finance <a href="mailto:raina.turner@walthamforest.gov.uk">raina.turner@walthamforest.gov.uk</a> 0208 496 3520  Mohammad Akhtar; Principal Accountant <a href="mailto:Mohammad.Akhtar@walthamforest.gov.uk">Mohammad.Akhtar@walthamforest.gov.uk</a> 0208 496 3703		
Appendices	Appendix A: Funding Blocks 2018-19 & 2019-20 Appendix B: Use of DSG Balances 2018-19 & 2019-20		

**1. SUMMARY**

- 1.1 This report updates School Forum on the 2018-19 final outturn and 2019-20 updated allocations for the Dedicated Schools Grant (DSG).

**2. RECOMMENDATIONS**

**Schools Forum is asked to note:**

- 2.1 The final settlement of DSG allocation to the Local Authority (LA) for 2018-19, after academy recoupment and including the July 2019 Early Years Adjustment of **£0.538 million**, was **£167.300 million**.
- 2.2 The cumulative brought forward DSG balance from 2017-18 was **£4.388 million**, **£2.316 million was used** in year resulting in a carry forward total of **£2.012 million** into 2019-20.
- 2.3 The forecast deficit of **£1.690 million** in DSG balances at the end of 2019-20.



### 3. REASON

- 3.1 The LA provides Schools Forum with updates on the DSG final settlement allocation and Outturn position for the previous financial year as submitted to the Department for Education.
- 3.2 In prior years the net DSG balances were in surplus, however, for the end of 2019-20 an overall deficit of **£2.127 million** is forecast. This is **£0.497 million** below the 1% deficit threshold of £2.624 million which would require a recovery plan to be sent to the DFE. As part of the 2020-21 DSG budget cycle, discussions are required on the current trajectory of the DSG balances and the use of any unallocated balances.

### 4. BACKGROUND

#### DSG & SCHOOLS Outturn for 2018-19

- 4.1 The DSG comprises of four funding blocks: The Schools, Early Years, High Needs and Central School Services. Table 1 sets out the DSG received for 2018-19 and the allocation for 2019-20.
- 4.2 The final 2018-19 DSG allocated to the Local Authority (LA) after adjusting for Academy recoupment of **£94.455 million** (Schools Block £85.902 million; High Needs Block £8.553 million) was **£166.762 million**, this increases to **£167.300 million** once the July 2019 Early Years adjustment of **£0.538 million** is accounted for. This additional allocation increases the Early Years Block carry forward into 2019-20 however this is due to providers and has been paid in 2019-20. Appendix A shows the details of the funding blocks for 2018-19 and 2019-20 to date.
- 4.3 The DSG had a brought forward surplus of **£4.388 million**. In 2018-19 a total sum of **£2.375 million** was applied leaving a sum of **£2.012 million** carried into 2019-20. The table below summarizes the DSG balances over each block and planned use of balances as at the time of writing this report and is a projected net deficit position of **£2.127 million** in 2019-20. Collectively, the surpluses on the Schools Block, Growth Fund and Early Years Block partially offset the High Needs over spend.

DSG Reserves balances as at 31 March 2019 and Forecast as at 31 March 2020					
	31 March 2017	Movement 2018-19	31 March 2018	Forecast Movement 2019-20	Forecast to 31 March 2020
	£	£	£	£	£
Dedicated Schools Grant Balances					
Schools Block	919,000	-454,752	464,248	-434,968	29,280
Growth Fund	0	414,072	414,072	600,000	1,014,072
High Needs Block	944,000	-2,679,760	-1,735,760	-3,426,000	-5,161,760
Early Years Block	2,525,000	344,495	2,869,495	-878,454	1,991,041
<b>Total DSG Over (-) / under (+) spends</b>	<b>4,388,000</b>	<b>-2,375,945</b>	<b>2,012,055</b>	<b>-4,139,422</b>	<b>-2,127,367</b>

- 4.4 Appendix B sets out in more detail the use of DSG balances against each block. The planned use of reserves is using the commitments reported to January 2019 Schools Forum for the Early Years block and assumptions have been made to arrive at balances for the High Needs Block, Schools Block and Growth Fund.
- 4.5 The HN block is currently projected expected to have an in-year expenditure over EFSA allocation of **£3.426 million**. A report will be brought to October Schools Forum on High Needs expenditure.
- 4.6 The balances on the Early Years block improved for two reasons: firstly the additional 2018-19 allocation of **£0.538 million** received in July 2019 and secondly a reduction in planned use of in-year grant of **£0.802 million**.
- 4.7 An assumption is made that of the DSG balances held for the Growth Fund will be drawn upon at an estimate of £0.300 million up to 2020-21 to offset the reduction in Growth Fund allocation from the ESFA.

#### **DSG Allocations 2019-20**

- 4.8 The gross DSG allocation for 2019-20 is **£262.399 million** a net increase of **£0.644 million** from 2018-19. There is a net decrease of £0.130 million in the Schools Block. This has arisen following a decrease in funding received for primary schools of £0.835 million, a reduction in growth fund of £1.006 million; partially offset by an increase in allocation for secondary schools of £1.570 million resulting in a net increase of £0.876 million. This figure is unchanged from that reported to Schools Forum in January 2019.
- 4.9 The High Needs Block has increased by £0.427 million, due to an increase of £0.169 million on Basic Need, £0.174 million on area cost adjustment and £0.084 million on import/export adjustment. This figure has increased by £0.084 million from that reported in January 2019.

- 4.10 The Early Years Block has increased by £0.389 million which mainly relates to the 3 & 4 Year-Olds additional 15 hours entitlement. This figure is increased by £0.914 million from that reported in January 2019 (**£21.574 million**).

OUTTURN REPORT APPENDIX A: Funding Blocks 2018-19 and 2019-20

	2018-19			2019-20			Gross Allocation Change £m	Gross Allocation Change %
	DfE Gross Allocation	Deduction for Academies	DSG Net of recoupment	DfE Gross Allocation	Deduction for Academies	DSG Net of recoupment		
	£m			£m				
Schools Block	197.828	-85.902	111.927	198.704	-94.541	104.163	0.876	0.4%
Growth Fund	3.291		3.291	2.286		2.286	-1.006	-30.6%
<b>Schools Block Total</b>	<b>201.120</b>		<b>115.218</b>	<b>200.990</b>		<b>106.449</b>	<b>-0.130</b>	<b>-0.1%</b>
High Needs Block	36.299	-8.553	27.745	36.726	-8.593	28.133	0.427	1.2%
Additional High Needs Block (Note 1)	0.683		0.683	0.683		0.683	0.000	0.0%
<b>High Need Block Total</b>	<b>36.981</b>		<b>28.428</b>	<b>37.409</b>		<b>28.816</b>	<b>0.427</b>	<b>1.2%</b>
Early Years Block	21.562		21.562	22.489		22.489 (Note 4)	0.927	
Additional Early Years Block (Note 2)			0.538			0.000		
<b>Early Years Block Total</b>	<b>21.562</b>		<b>22.100</b>	<b>22.489</b>		<b>22.489</b>	<b>0.927</b>	<b>4.3%</b>
<b>Central School Services Block</b>	<b>1.554</b>		<b>1.554</b>	<b>1.512</b>		<b>1.512</b>	<b>-0.043</b>	<b>-2.7%</b>
<b>Dedicated School Grant Total</b>	<b>261.218</b>		<b>167.300</b> (Note 3)	<b>262.399</b>		<b>159.266</b>	<b>1.182</b>	<b>0.5%</b>
Notes								
1. Additional funding announced 17 December 2018 for both 2018-19 and 2019-20. £0.683 million is 1.9% addition to High Needs Block								
2. Final allocation for Early Years announced in June 2019, taking into account 2018-19 adjustment for January 2019 pupil numbers. Additional £538K allocated								
3. £166.762 million stated in the annual accounts as the Early Years adjustment was announced after the accounts had been prepared.								
4. Full Year Effect of adjustment for January 2019 pupil numbers								

OUTTURN REPORT APPENDIX B of Balances 2018-19	Use	Financial Year	Schools	High Needs	Early Years	SENDIF	School Improve ment	SFFC	Universal Offer	Growth	Total
			£	£	£		£	£	£	£	£
CLOSING BALANCE		2017-18	769,000	944,000	2,525,000		23,000	0	127,000	0	4,388,000
<b>ACTUAL USE OF BALANCES 2018-19</b>											
Leadership & Management											0
Schools Facing Financial Challenges											0
Hub Development											0
Universal Access to the Hub											0
School Business Manager Support & Training											0
Converting Academies											0
MFG Compensation Payments			(83,065)								(83,065)
Rates Reimbursement			(231,109)								(231,109)
Split Site payment			(70,000)								(70,000)
School Improvement support			(80,000)								(80,000)
General Contingencies											0
Employment Strategist & Co-ordinator				(59,000)							(59,000)
To mitigate 2018-19 underspend				(885,000)							(885,000)
Contingency for increased delivery hours											0
Speech & Language Therapy contract					(172,600)						(172,600)
Workforce Development Commissioned Services					(20,000)						(20,000)
Premises & Place Development					(50,493)						(50,493)
Children and Families Centres					(200,000)						(200,000)
Education Psychology					(8,050)						(8,050)
Two year Old Top-Up					(144,219)						(144,219)
Centrally retained											0
Systems Leadership											0
Prior Year Adjustment					(56,241)						(56,241)
Underspends/ Overspends			9,422	(1,735,760)	834,304	161,794				414,072	(316,168)
CLOSING BALANCE		2018-19	314,248	(1,735,760)	2,707,701	161,794	23,000	0	127,000	414,072	2,012,055
<b>REVISED EAR MARKED BALANCES 2019-20</b>											
Make balance for School Improvement £200K less £80K			(97,000)				97,000				
Move earmarked for SFFC from UO and Schools Block			(104,000)					109,000	(5,000)		
<b>ADJUSTED BALANCES</b>			113,248	(1,735,760)	2,707,701	161,794	120,000	109,000	122,000	414,072	2,012,055



Meeting / Date	<b>SCHOOLS FORUM 18 September 2019</b>	Agenda Item	<b>7</b>
Report Title	<b>Schools Forum membership and powers</b>		
Decision/Discussion/ Information	For Discussion and Decision		
Report Author/ Contact details	<b>Duncan James-Pike, Strategic Finance Advisor</b> <b>020 8496 3502</b> <a href="mailto:duncan.james-pike@walthamforest.gov.uk">duncan.james-pike@walthamforest.gov.uk</a>		
Appendix A	<b>Schools forum powers and responsibilities</b>		

## 1. SUMMARY

- 1.1 This report reviews the representation of maintained schools and academies / free schools at Schools Forum and makes a recommendation to update the representation following the October 2018 census.

## 2. RECOMMENDATIONS

### 2.1 Schools Forum to agree:

- 2.1.1 That the current balance of school representation is appropriate to continue for the 2019-20 session.

## 3. REASON

- 3.1 The balance of representation at Schools Forum should be broadly proportionate to the number of pupils in each group of schools.

## 4. BACKGROUND

### 4.1 Schools Forum guidance

- 4.1.1 The Schools Forums Regulations provide a framework for the appointment of members but allow a considerable degree of discretion in order to accommodate local priorities and practice.
- 4.1.2 Schools Forum powers and responsibilities are included as Appendix A to this report and can be found with the Schools Forum Operational and good practice guide, September 2018; Schools forums structure; and Schools forum self-assessment toolkit at:  
<https://www.gov.uk/government/publications/schools-forums-operational-and-good-practice-guide-2015>.

## **4.2 Represented Groups**

- 4.2.1 Schools members and academies members must comprise at least 2/3rds of the Schools Forum membership.
- 4.2.2 Maintained primary schools; maintained secondary schools; and academies and free schools must be broadly proportionately represented on Schools Forum, based on the total number of pupils registered at them.

## **4.3 Maintained Schools members**

- 4.3.1 Where the LA maintains the following types of school, they must be represented on the Schools Forum: Primary Schools; Secondary Schools; Special Schools; Nursery Schools; and PRUs.
- 4.3.2 Within each of the five groups above there could be the following types of member: Headteachers (or their representative); and Governors.
- 4.3.3 In overall terms there must be at least one headteacher (or their representative) and one governor.
- 4.3.4 The relevant sub-group of the relevant type of school elects their representatives e.g. primary school governor representatives are elected by the governors of primary schools, secondary school headteacher representatives are elected by the headteachers of secondary schools.
- 4.3.5 LA appointment of members may occur only if no election takes place by the agreed date or in the event of a tie.

## **4.4 Academy and free school members**

- 4.4.1 At least one academies member must be a representative of mainstream academies, which includes free schools, UTCs and Studio Schools.
- 4.4.2 In addition, there must be one member for each of the following groups (if such exist in the LA area): Special academies, including free schools; and Alternative Provision academies, including free schools.
- 4.4.3 The relevant proprietors of academies elect for their group, e.g. mainstream academies, special academies and alternative provision academies.
- 4.4.4 LA appointment of members may occur only if no election takes place by the agreed date or in the event of a tie.

## **4.5 Non-school members**

- 4.5.1 There are four non-school members: Early Years Private, Voluntary and Independent (PVI) providers; 16-19 providers; Trade Unions; and a diocesan representative.



4.5.2 Before considering other groups, the LA must consider diocesan representation.

#### **4.6 Practice in Waltham Forest**

4.6.1 Waltham Forest has been compliant with regulations with one exception: having one representative for special education rather than the remaining maintained special school exercising their right to separate membership.

4.6.2 Membership has been uncontested recently and it has been the practice for groups to co-opt new members or for the LA to appoint members rather than hold elections.

#### **4.7 October 2018**

4.7.1 Following the October 2018 school census, it appears that the balance of representation at Schools Forum remains broadly proportionate to the number of pupils in each group of schools, see Table below.

	Maintained Primary	Maintained Secondary	Academy and Free
Number on Roll October 2018	13,171	6,880	18,079
Members*	6	3	8
Members per pupil	2,200	2,300	2,300

\*Maintained Primary and Secondary Members include 1 Governor in each group



Education & Skills  
Funding Agency

### Schools forum powers and responsibilities APPENDIX A

A summary of the powers and responsibilities of schools forums.

Function	Local authority	Schools forum	DfE role
Formula change (including redistributions)	Proposes and decides	Must be consulted [voting restrictions apply - see schools forum structure document] and informs the governing bodies of all consultations	Checks for compliance with regulations
Movement of up to 0.5% from the schools block to other blocks	Proposes	Decides	Adjudicates where schools forum does not agree local authority proposal
Contracts (where the local authority is entering a	Proposes at least one	Gives a view and informs	None

Function	Local authority	Schools forum	DfE role
contract to be funded from the schools budget)	month prior to invitation to tender, the terms of any proposed contract	the governing bodies of all consultations	
<p>Financial issues relating to:</p> <ul style="list-style-type: none"> <li>• arrangements for pupils with special educational needs, in particular the places to be commissioned by the local authority and schools and the arrangements for paying top-up funding</li> <li>• arrangements for use of pupil referral units and the education of children otherwise than at school, in particular the places to be commissioned by the local authority and schools and the arrangements for paying top-up funding</li> <li>• arrangements for early years provision</li> <li>• administration arrangements for the allocation of central government grants</li> </ul>	Consults annually	Gives a view and informs the governing bodies of all consultations	None

Function	Local authority	Schools forum	DfE role
Minimum funding guarantee (MFG)	Proposes any exclusions from MFG for application to DfE	Gives a view	Approval to application for exclusions
Carry forward a deficit on central expenditure to the next year to be funded from the schools budget	Proposes	Decides	Adjudicates where schools forum does not agree local authority proposal
Any brought forward deficit on de-delegated services which is to be met by the overall schools budget.	Proposes	Decides	Adjudicates where schools forum does not agree local authority proposal
De-delegation for mainstream maintained schools for: <ul style="list-style-type: none"> <li>• contingencies</li> <li>• administration of free school meals</li> <li>• insurance</li> <li>• licences/subscriptions</li> </ul>	Proposes	Maintained primary and secondary school member representatives will decide for their phase. Middle schools are treated according to their	Will adjudicate where schools forum does not agree local authority proposal

Function	Local authority	Schools forum	DfE role
<ul style="list-style-type: none"> <li>• staff costs – supply cover</li> <li>• support for minority ethnic</li> <li>• pupils/underachieving groups</li> <li>• behaviour support services</li> <li>• library and museum services</li> <li>• School improvement</li> </ul>		deemed status	
<p>General Duties for maintained schools</p> <ul style="list-style-type: none"> <li>• Contribution to responsibilities that local authorities hold for maintained schools <b>(please see <a href="#">pre 16 schools funding operational guide</a> for more information)</b></li> </ul>	Proposes	Would be decided by the relevant maintained school members (primary, secondary, special and PRU).	Adjudicates where schools forum does not agree local authority proposal
<p>Central spend on and the criteria for allocating funding from:</p> <ul style="list-style-type: none"> <li>• funding for significant pre-16 <a href="#">pupil growth</a>, including new schools set up to meet basic need, whether maintained or academy</li> <li>• funding for good or outstanding schools with</li> </ul>	Proposes	Decides	Adjudicates where schools forum does not agree local authority proposal

Function	Local authority	Schools forum	DfE role
<p><a href="#">falling rolls</a> where growth in pupil numbers is expected within three years</p>			
<p>Central spend on:</p> <ul style="list-style-type: none"> <li>• early years block provision funding to enable all schools to meet the infant class size requirement</li> <li>• back-pay for equal pay claims</li> <li>• remission of boarding fees at maintained schools and academies</li> <li>• places in independent schools for non-SEN pupils</li> <li>• admissions</li> <li>• servicing of schools forum</li> <li>• Contribution to responsibilities that local authorities hold for all schools</li> </ul>	Proposes	Decides	Adjudicates where schools forum does not agree local authority proposal
<p>Central spend on:</p> <ul style="list-style-type: none"> <li>• capital expenditure funded from revenue –</li> </ul>	Proposes up to the value committed in the previous financial	Decides for each line	Adjudicates where schools forum does not agree local

Function	Local authority	Schools forum	DfE role
<p>projects must have been planned and decided on prior to April 2013 so no new projects can be charged</p> <ul style="list-style-type: none"> <li>contribution to combined budgets – this is where the schools forum agreed prior to April 2013 a contribution from the schools budget to services which would otherwise be funded from other sources</li> <li>existing termination of employment costs (costs for specific individuals must have been approved prior to April 2013 so no new redundancy costs can be charged)</li> <li>prudential borrowing costs – the commitment must have been approved prior to April 2013</li> </ul>	<p>year and where expenditure has already been committed.</p> <p>See table four page 31 to 35 for Information on historic commitments. Read <a href="#">establishing local authority DSG baselines</a> for more information.</p>		<p>authority proposal</p>
<p>Central spend on:</p> <ul style="list-style-type: none"> <li>high needs block provision</li> <li>central licences negotiated by the Secretary of State</li> </ul>	<p>Decides</p>	<p>None, but good practice to inform forum</p>	<p>None</p>

Function	Local authority	Schools forum	DfE role
Scheme of financial management changes	Proposes and consults the governing body and Head of every school	Approves (schools members only)	Adjudicates where schools forum does not agree local authority proposal
Membership: length of office of members	Decides	None (but good practice would suggest that they gave a view)	None
Voting procedures	None	Determine voting procedures	None
Chair of schools forum	Facilitates	Elects (may not be an elected member of the Council or officer)	None



Meeting / Date	<b>SCHOOLS FORUM 18 September 2019</b>	Agenda Item	<b>8</b>
Report Title	<b>Forward Plan</b>		
Decision/Discussion/ Information	For Noting		
Report Author/ Contact details	<b>Duncan James-Pike, Strategic Finance Advisor</b> <b>020 8496 3502</b> <a href="mailto:duncan.james-pike@walthamforest.gov.uk">duncan.james-pike@walthamforest.gov.uk</a>		
Appendix A	<b>Forward Plan 2019-20 session</b>		

## **1. SUMMARY**

1.1 Appendix A to this report sets out the proposed forward plan for the 2019-20 session of Schools Forum.

## **2. RECOMMENDATIONS**

### **2.1 Schools Forum to note:**

2.1.1 The 2019-20 Forward Plan.

Appendix A  
 Timelines of Key Actions Required by the Local Authority and Schools Forum Forward Plan  
 for 2019-20

**SUBJECT TO DFE UPDATES**

<b>Date</b>	<b>Organisation</b>	<b>Action</b>
<b>2019</b>		
9 September	EY Providers	Expressions of interest sought from all providers of free early education to become a member of the EYTFG
11 September	HN stakeholders	First SEND Workshop / Engagement meeting
18 September	Schools Forum	<u>Planned Reports:</u> <ul style="list-style-type: none"> <li>• Early Years Block: Early Years funding formula planning for free education payments for 2, 3 and 4 year olds for 2020-21</li> <li>• Dedicated Schools Grant Outturn 2018-19</li> <li>• Local Funding Formula 2020-21/2018-19 DSG Outturn Report and Planned use of balances</li> <li>• School Forum Membership</li> <li>• Local Funding Formula 2020-21</li> </ul>
27 September		Closing Date for expressions of interest for EYTFG
<b>4 October</b>	<b>DFE</b>	<b>School Census</b>
16 October	EY Providers	EYTFG members announced in The Hub newsletter
16 October	EY Providers	First meeting EY T&F group
<b>16 October</b>	<b>Schools Forum</b>	<b>Workshop on Local Funding Formula; Growth Fund; and Falling Rolls Fund</b>
18 October	HN Stakeholders	Second SEND Workshop / Engagement meeting
30 October	HN Stakeholders	Third SEND Workshop / Engagement meeting
13 November	Schools Forum	<u>Planned Reports:</u> <ul style="list-style-type: none"> <li>• Local Funding Formula update</li> <li>• High Needs Block update 2019-20 and update on proposals 2020-21</li> </ul>
<b>18 November</b>	<b>ESFA</b>	<b>Place Funding Submission &amp; Hospital Places</b>
25-29 November	Schools	On line consultation with all schools on the proposed LFF

<b>30 November</b>	<b>DFE</b>	<b>Closing date for disapplication requests</b>  <b>High Needs Place Commissioning Academic Year 2020/21 response to DFE query</b>
11 December	Schools Forum	<u>Planned Reports:</u> <ul style="list-style-type: none"> <li>• High Needs proposals 2020-21</li> <li>• Local Funding Formula 2020-21 and consultation result if needed</li> <li>• <b>Decision</b> on Growth Fund and Falling Rolls Fund</li> <li>• <b>Decision</b> on Central School Services 2020-21 (All)</li> <li>• <b>Decision</b> on Services to Maintained Schools 2020-21 (Maintained Schools Only)</li> <li>• <b>Decision</b> on any movement from Schools Block to High Needs Block</li> <li>• Early Years Block 2020-21: Modelling of Indicative Proposed EYFF for 2020-21</li> </ul>
Mid December	ESFA	Publication by DfE/ESFA of provisional 2020-21 DSG block allocations
<b>Mid December</b>	<b>ESFA</b>	<b>Authority Proforma Tool APT available</b>
18 December	EY Providers	Second meeting EY T&F Group
<b>2020</b>		
15 January	Schools Forum	<u>Planned Reports:</u> <ul style="list-style-type: none"> <li>• Schools Block Individual Budget Shares 2020-21</li> <li>• Early years indicative modelling 2020-21</li> <li>• High Needs 2020-21 Indicative Financial Year 2020-21 allocations including impact of Academic Year 2021/22 commissioning</li> </ul>
16 January	LA	<b>Cabinet formally approve Schools Block Local Funding Formula and agree High Needs budget allocation options 2020-21</b>
<b>Mid January</b>	<b>LA</b>	<b>Submission of APT to EFSA</b>

<b>Mid January</b>	<b>LA</b>	<b>LA Checks Places Commissioned for Recoupment Purposes. Opportunity to Update</b>
16-24 January	EY Providers	On line consultation with all FEEE providers on the proposed EYFF and group question and answer sessions run for providers
27-31 January	LA	Analysis of EY consultation responses
5 February	EY Providers	Final meeting EY T&F Group
12 February	Schools Forum	<u>Planned Reports:</u> <ul style="list-style-type: none"> <li>• Early years Block Individual Budget Shares 2020-21 (including. proposed EYFF for 2020-21).</li> </ul>
28 February	LA	Individual Schools Budgets published for 2020-21 including HN budgets
<b>19 March</b>	<b>LA</b>	<b>Cabinet formally approve School, academy and PVI budgets</b>

Meeting / Date	<b>SCHOOLS FORUM 18 September 2019</b>	Agenda Item	<b>9</b>
Report Title	<b>Local Funding Formula 2020-21</b>		
Decision/Discussion/ Information	For Information and Action		
Report Author/ Contact details	<b>Duncan James-Pike, Strategic Finance Advisor</b> <b>020 8496 3502</b> <a href="mailto:duncan.james-pike@walthamforest.gov.uk">duncan.james-pike@walthamforest.gov.uk</a>		
Appendices	Appendix A: Comparison of national and local funding formula		

## 1. SUMMARY

1.1 This report sets out the proposed consultations on amendments to the Local Funding Formula (LFF).

## 2. RECOMMENDATIONS

### 2.1 Schools Forum to agree:

2.1.1 To use the October 2019 meeting of Schools Forum to consider whether any changes to the LFF should be made and consulted on, including the level of the Minimum Funding Guarantee (MFG).

## 3. REASON

3.1 The Local Authority consults schools and Schools Forum on the Local Funding Formula each year and is now able to vary the MFG.

3.2 There are several factors in the formula that could be reviewed and /or confirmed.

3.3 LAs must consult with schools before setting the MFG.

## 4. BACKGROUND

### 4.1 Changes in 2019-20

4.1.1 In December 2018 Schools Forum confirmed that when the Local Authority set the 2019-20 School Budgets, the LA should aim to set the Local Funding Formula by moving £1 million from FSM6 to Low Prior Attainment in each phase; use any increase in funding for AWPU; and aim to set the MFG at 0%.

4.1.2 Other changes included a revised split-site factor and establishing a falling rolls fund.

## **4.2 National Funding Formula (NFF)**

- 4.2.1 The DFE expects each authority's LFF to transition towards the NFF although changing directly to the NFF would get reversed out substantially by the operation of the MFG. That said, moving £1 million from FSM6 to Low Prior Attainment in each phase was a significant step towards the NFF.
- 4.2.3 Currently Waltham Forest is funded at 7.1% above the national funding formula (excluding PFI, rates, split-sites and mobility) so direct comparisons are challenging. Appendix A shows the differences between the current LFF distribution and how the NFF would distribute the same overall funding.
- 4.2.4 The greatest differences are in the lower weighting in the NFF to basic entitlement (AWPU) and FSM6 and the higher weightings in the NFF to IDACI and Low Prior Attainment.

## **4.3 Minimum Funding Guarantee (MFG)**

- 4.3.1 For 2020-21 the MFG may be varied between +0.5% and +1.84% in contrast to 2019-20 when the range was -1.5% to +0.5%. The Minimum Funding Guarantee (MFG) for 2019-20 was set at 0%, the same as in 2018-19.
- 4.3.2 The "cap" and "scale" factors in the MFG may also be varied. The cap on gains was set at 0% in 2019-20, which meant that all gainers contributed to supporting the MFG.
- 4.3.3 The gains scale was set at 17.4% which meant that gainers kept 82.6% of their gains.
- 4.3.4 No school contributed more than 1% of its pre-MFG budget. This was achieved at a cost of £289,665.

## **5 Consultation**

- 5.1 The LA must consult with schools and Schools Forum on the Local Funding Formula and MFG each year.
- 5.2 The October Schools Forum meeting will consider LFF issues in detail and following this a decision will be made as to whether further consultation with schools needs to be undertaken before recommendations are taken to Schools Forum.



LFF APPENDIX A: NATIONAL V LOCAL FUNDING FORMULA											
	PUPIL NUMBERS AND CHARACTERISTICS FROM APT MODEL 2019-20		PRODUCT OF 2019-20 LFF			PRODUCT OF USING NFF DISTRIBUTION ON LFF TOTAL			CHANGE FROM USING NFF DISTRIBUTION		
	PRIMARY	SECONDARY	PRIMARY	SECONDARY	TOTAL	PRIMARY	SECONDARY	TOTAL	PRIMARY	SECONDARY	TOTAL
	£	£	£	£	£	£	£	£	£	£	£
KS1&2	24,469		87,425,951	0	87,425,951	77,893,150	0	77,893,150	-9,532,801	0	-9,532,801
KS3		8,325	0	40,484,475	40,484,475	0	37,268,525	37,268,525	0	-3,215,950	-3,215,950
KS4		5,336	0	25,948,968	25,948,968	0	27,121,750	27,121,750	0	1,172,782	1,172,782
<b>SUBTOTAL BASIC ENTITLEMENT</b>			<b>87,425,951</b>	<b>66,433,443</b>	<b>153,859,394</b>	<b>77,893,150</b>	<b>64,390,275</b>	<b>142,283,425</b>	<b>-9,532,801</b>	<b>-2,043,168</b>	<b>-11,575,968</b>
Ever 6 FSM	6,298	5,224	4,418,541	6,772,346	11,190,887	3,941,314	4,752,658	8,693,972	-477,226	-2,019,688	-2,496,915
IDACI A	439	363	130,035	203,700	333,735	292,732	340,836	633,568	162,697	137,137	299,833
IDACI B	1,807	1,198	390,242	498,533	888,775	879,352	833,268	1,712,620	489,110	334,736	823,846
IDACI C	1,875	1,214	376,897	471,189	848,086	847,471	788,106	1,635,577	470,574	316,917	787,491
IDACI D	4,670	2,664	864,016	951,005	1,815,021	1,948,435	1,589,846	3,538,282	1,084,419	638,841	1,723,260
IDACI E	4,282	2,406	530,961	649,573	1,180,534	1,190,928	1,087,332	2,278,260	659,967	437,759	1,097,726
IDACI F	5,892	3,046	606,845	612,231	1,219,076	1,365,537	1,023,648	2,389,185	758,692	411,417	1,170,109
<i>SUBTOTAL IDACI</i>			<i>2,898,996</i>	<i>3,386,231</i>	<i>6,285,227</i>	<i>6,524,455</i>	<i>5,663,037</i>	<i>12,187,492</i>	<i>3,625,459</i>	<i>2,276,806</i>	<i>5,902,265</i>
<b>SUBTOTAL DEPRIVATION</b>			<b>7,317,537</b>	<b>10,158,577</b>	<b>17,476,114</b>	<b>10,465,769</b>	<b>10,415,695</b>	<b>20,881,464</b>	<b>3,148,232</b>	<b>257,118</b>	<b>3,405,350</b>
LOW PRIOR ATTAINMENT	7,543	2,784	3,697,205	2,742,790	6,439,994	8,933,462	5,000,167	13,933,629	5,236,257	2,257,378	7,493,635
EAL	6,800	764	5,439,685	611,392	6,051,077	4,058,114	1,226,627	5,284,741	-1,381,571	615,236	-766,335
<b>SUBTOTAL AEN</b>			<b>9,136,890</b>	<b>3,354,181</b>	<b>12,491,071</b>	<b>12,991,576</b>	<b>6,226,795</b>	<b>19,218,371</b>	<b>3,854,686</b>	<b>2,872,614</b>	<b>6,727,300</b>
<b>LUMP SUM (No of schools)</b>	<b>51</b>	<b>17</b>	<b>5,100,000</b>	<b>2,125,000</b>	<b>7,225,000</b>	<b>6,501,239</b>	<b>2,167,080</b>	<b>8,668,318</b>	<b>1,401,239</b>	<b>42,080</b>	<b>1,443,318</b>
<b>TOTAL</b>			<b>108,980,377</b>	<b>82,071,202</b>	<b>191,051,579</b>	<b>107,851,734</b>	<b>83,199,845</b>	<b>191,051,579</b>	<b>-1,128,643</b>	<b>1,128,643</b>	<b>0</b>