

Members of the Schools Forum are asked to attend a meeting to be held on

**Tuesday 29<sup>th</sup> September 2015**

**18:00pm – 19.30pm**

**@**

**Lambeth Academy,**

**Elms Road**

**London,**

**SW4 9ET**

for the transaction of the business set out below.

***Agenda***

<b>Time*</b>	<b>Item</b>	
18.00	1.	Apologies & welcome
	2.	Draft minutes from the Schools Forum meeting held 19 <sup>th</sup> May 2015
	3.	Matters Arising
	4.	Membership
	5.	Register of Interests and Declaration of New Interests
	6.	Forward Plan
18:30	7.	2016-17 School Funding Arrangements
18:50	8.	Early Years Sub-Group
19:10	9.	Early Years Pupil Premium Allocations (for noting)
19:15	10.	Alternative Provision Pupil Premium Grant funding arrangements (for noting)
19:20	11.	Looked After Children Pupil Premium Grant (for noting)
19:25	12.	Locally Managed Schools (LMS) Balances (for noting)
19:30	13.	Any other business (AOB)

***Next meeting: 12<sup>th</sup> January 2015***

1. **Welcome & apologies**

Chair to note the apologies as listed on the sign-in sheet

2. **Draft minutes from the Schools Forum meeting held 19th May 2015**

Draft minutes to the previous meetings are separately attached. These need to be considered by the Schools Forum for accuracy

3. **Matters Arising**

The Chair will arrange for a working group to meet in the autumn to consider the distribution of £580K additional High Needs funding support for SEN to schools with disproportionate levels of pupils SEN. The working group will report back to the Schools Forum on 12<sup>th</sup> January 2016.

4. **Membership**

Richard Leonard has confirmed that he is currently unable to resume his position as Pupil Referral Unit representative.

**Vacancies Remaining**

**School Members**

- 1 x Primary VA Governor representative
- 1 x Secondary VA Governor representative
- 1 x Secondary Foundation / Community Head Teacher representative
- 1 x Special School Head Teacher representative

**Non School Members**

- 1 x 16-19 Non-Schools representative
- 1 x Pupil Referral Unit representative

**Action:**

- *David Boyle from Dunraven Academy has been nominated to stand in the vacant Secondary Head Teacher position. Schools Forum to ratify the nomination.*
- *Roger Bowdery from Bishop Thomas Grant has been nominated to stand in the vacant Secondary Governor position. Schools Forum to ratify the nomination.*
- *Marylin Ross, new Headteacher at Michael Tippett has been nominated to stand in the vacant Special School head Teacher position. Schools Forum to ratify the nomination.*
- *Mark Silverton from Lambeth College has been nominated to stand in the vacant 16-19 Non-School position. Schools Forum to ratify the nomination.*

5. **Register of Interests and Declaration of New Interests**

All members are asked to declare any new interest at the start of the meeting and sign new declarations in relation to the 2015-16 financial year

**Action:**

- *All new members to submit declaration of interests for 2015-16*

### Lambeth Schools Forum meeting papers: 29<sup>th</sup> September 2015

LAMBETH SCHOOLS FORUM MEMBERSHIP									
	TYPE OF MEMBER	GROUP	SUB GROUP	SUB SUB GROUP	NAME	SCHOOL	MEMBERSHIP START DATE	MEMBERSHIP EXPIRY DATE	POSITION OCCUPIED
1	School	Primary	C	Headteacher	Alexandra Hardy	Henry Cavendish	03 November 2010	03 November 2018	1
2	School	Primary	C	Headteacher	Chris Ashley-Jones (Vice-Chair from May 2015)	Hitherfield Primary	14 May 2014	14 May 2018	1
3	School	Primary	C	Headteacher	Richard Thornhill (Chair from May 2015)	Loughborough	06 December 2011	06 December 2019	1
4	School	Primary	VA	Headteacher	James Robinson	Immanuel & St Andrews	03 February 2010	03 February 2018	1
5	School	Primary	VA	Headteacher	Jayne Mitchel	St Andrews CE	14 May 2014	14 May 2018	1
6	School	Primary	C	Governor	Kate Mason	Stockwell Primary	14 May 2014	14 May 2018	1
7	School	Primary	C	Governor	Matthew Green	Telferscot	06 December 2011	06 December 2015	1
8	School	Primary	VA	Governor	VACANT	VACANT			0
9	School	Primary	C	Governor	VACANT	VACANT			0
10	School	Primary	C	Governor	Trudy Lister	Sunnyhill	14 May 2014	14 May 2018	1
11	School	Secondary	VA / VC	Headteacher	Nick Butler	St Gabriel's College	01 October 2014	30 September 2018	1
12	School	Secondary	F / C	Headteacher	VACANT	VACANT			0
13	School	Secondary	VA	Governor	VACANT	VACANT			0
14	School	Secondary	A	VACANT	VACANT	VACANT			0
15	School	Secondary	A	Principal	Jan Shadick	Lambeth Academy	21 February 2012	21 February 2016	1
16	School	Special	C	Headteacher	VACANT	VACANT			0
17	School	Nursery	C	Headteacher	Rachel Hedley	Maytree	10 October 2007	09 October 2015	2
18	Non School	PRU		Headteacher	Richard Leonard	PLT	21 September 2010	20 September 2018	1
19	Non School	PVI		Manager	Raymond Smith	Pre-School Learning Allia	02 October 2014	01 October 2018	1
20	Non School	PVI		Manager	Marcia Hosain	Horizons Day Nursery	02 October 2014	01 October 2018	1
21	Non School	14-19 Partnership			VACANT	VACANT			0
22	Non School	Faith Body			Maksud Gangat	Orchard School	12 November 2014	12 November 2018	1
<b>TOTAL</b>									<b>16</b>
LAMBETH SCHOOLS MEMBER SUBSTITUTES POOL MEMBERSHIP									
	TYPE OF MEMBER	GROUP	SUB GROUP	SUB SUB GROUP	NAME	SCHOOL	MEMBERSHIP START DATE	MEMBERSHIP EXPIRY DATE	POSITION OCCUPIED
1	School Sub			Headteacher	VACANT	VACANT			
2	School Sub			Governor	VACANT	VACANT			
4	School Sub			Headteacher	VACANT	VACANT			
5	School Sub			Governor	VACANT	VACANT			
6	School Sub			Governor	VACANT	VACANT			
7	School Sub			Headteacher	Magdalin Babiker-Clancy	Lambeth Academy	21 February 2012	21 February 2016	1
9	Non School Sub	PVI		Manager	Sade Okocha	Oaktree Day Nursery	02 October 2014	01 October 2018	1
<b>TOTAL</b>									<b>2</b>

Lambeth Schools Forum meeting papers: 29<sup>th</sup> September 2015

Pro-Forma Register of Business Interests 2015-16

Name of Schools Forum Member: \_\_\_\_\_

Name of Business	Nature of Business	Nature of Interest	Date of Appointment or Acquisition	Date of Cessation of Interest	Date of Entry

I certify that I have declared all beneficial interests, which I or any person closely connected with me, have with businesses or other organisations which may have dealings with the Lambeth Schools Forum.

If any member has a direct personal financial interest (or other interest) in any item under discussion they should declare this at the beginning of the meeting and withdraw from the discussion of that item.

Signed ..... Date .....

Responsible Officer Checklist and Record Log:

**For the year beginning 1 April 2015**

## 6. Forward Plan

REF	MEETING DATE	SUBJECT	SF ACTION	SF ACTION DATE
1	29 Sep 2015	Proposed changes to School Funding Formula for 2016-17 Deadline for LAs to submit Exceptional School Funding	Decision	29 Sep 2015
2	29 Sep 2015	Formula exclusions to DfE	Decision	29 Sep 2015
3	29 Sep 2015	Agree Criteria for 2016-17 Growth Fund	Decision	29 Sep 2015
4	29 Sep 2015	Agree Criteria for 2016-17 Falling Rolls Fund	Decision	29 Sep 2015
5	29 Sep 2015	Draft APT Proforma submitted to DfE Proposed changes to the Early Years Single Funding	Decision	30 Oct 2015
6	29 Sep 2015	Formula for 2016-17 Additional SEN funding support for disproportionate	Decision	21 Jan 2016
7	12 Jan 2016	numbers of EHCPs and statements	Decision	21 Jan 2016
8	12 Jan 2016	Final APT Proforma submitted to DfE SEN Banding changes and SEN funding for EHCPs &	Decision	21 Jan 2016
9	12 Jan 2016	Statements	Decision	30 Mar 2016
10	15 Mar 2016	Full-time (30 hours) Nursery place funding from April 2017 (2017-18)	Decision	TBC

## 7. 2016-17 School Funding Arrangements

- 7.1. In July the Department of Education (DfE) published a number of documents outlining the School funding arrangements for the 2016-17 financial year. Although this announcement does not represent the introduction of a national funding formula, the DfE has further standardised the funding arrangements in preparation of the national funding formula.
- 7.2. The main change for 2016-17 is to incorporate the 2015-16 levels of funding for former non-recoupment academies (NRAs) into the Dedicated Schools Grant (DSG) School's Block for each local authority. Therefore local authorities will now be responsible for setting the budgets and funding NRAs although the Education Funding Agency will continue to pass-port the funding to all academies.
- 7.3. The underlying level of the Dedicated Schools Grant (DSG) Schools Block funding for 2016-17 is to be kept at the same per pupil level as in 2015-16; that is there will be no real increase taking into account inflation. After the Spending Review, the DfE will confirm the levels of funding for the Early Years Block and High Needs Block.
- 7.4. There are no changes to the data or eligibility criteria for the formula factors used to set school budgets. The minimum funding guarantee (MFG) will continue at -1.5% per pupil.
- 7.5. Once set, it is not permissible to make in-year redetermination of schools' budgets for pupils aged 5-16 other than for reallocation of funding for excluded pupils or rates. Previously local authorities were unable to make in-year revisions for rates but the DfE have now suggested that adjustments to rates can be made in-year **outside** of the funding formula. As we no longer

**Lambeth Schools Forum meeting papers: 29<sup>th</sup> September 2015**

have a de-delegated fund to enable in-year adjustments to rates, Lambeth are not proposing to make in early adjustments outside of the formula.

- 7.6. For 2016-17 the DfE are incorporating additional funding for former NRAs into each local authority's Schools Block. The transfer of funding is expected to be cost neutral to the local authority. Local authorities will receive funding for the former NRAs within their schools block allocations on the same basis as other mainstream maintained schools and academies. As such local authorities will now be responsible for setting the budgets for **all** schools and academies within the borough.
- 7.7. However the DfE are not proposing to make any amendment to the DSG Schools Block for estimated pupil growth within NRAs. Subsequently there may be a pressure on the local authorities to resource future growth in NRAs.
- 7.8. Any DSG underspend brought forward from previous years may be used to support central expenditure or be transferred to the High Needs or Early Years Blocks in 2016-17.

**Draft 2016-17 Authority Proforma Tool (APT)**

- 7.9. On 9<sup>th</sup> September the EFA realised the template for the Draft 2016-17 Authority Proforma Tool (APT) to allow LAs to model options for funding schools for 2016-17.
- 7.10. The Draft APT is prepopulated with October 2014 Schools Block Data and needs to be submitted to the EFA by 30<sup>th</sup> October 2015.
- 7.11. The following table conveys how Schools Block DSG was allocated by factor in 2015-16:

<b>Factor</b>	<b>2015-16 DSG Funding distributed</b>	<b>2015-16 Unit Value</b>
AWPU - Primary	£86,285,642	£4,058
AWPU – Secondary KS3	£41,244,360	£6,060
AWPU – Secondary KS4	£23,880,480	£6,240
Deprivation – Primary	£7,520,432	£780
Deprivation - Secondary	£4,819,717	£780
SEN – Prior Attainment - Primary	£4,359,152	£739
SEN – Prior Attainment - Secondary	£4,721,831	£1,894
EAL Primary	£4,278,458	£682
EAL Secondary	£2,013,966	£2,309
Mobility – Primary	£285,957	£1,532
Mobility - Secondary	£30,791	£1,532
Lumpsum	£13,090,000	£170,000
PFI	£200,000	N/A
Split-Site	£444,045	N/A
Rates	£3,204,167	N/A

% Distributed through Basic Entitlement:	77.10%
% Pupil Led Funding	91.37%

- 7.12. The allocations by factor are divided by the number of eligible pupils to derive the corresponding factor unit value. Schools Forum need to decide whether they would like to move funding between the factors for 2016-17 or keep unit values relatively static.
- 7.13. Schools Finance will be working on modelling indicative 2016-17 budgets for schools using the Draft APT and will circulate this to School Forum members prior to submission at the end of October.

**Action**

- **Forward Plan Ref 1: Proposed changes to School Funding Formula for 2016-17**
  - **SF to consider if the funding distributed within the factors in the table (p6) is still appropriate.**
  - **If yes, no action is required**
  - **If no, recommend movement of funding between factors for modelling purposes**

**Growth Funding**

- 7.14. Local authorities may top-slice the DSG to form a Growth Fund, to support schools which are required to provide extra pupil places, in order to meet basic need within the authority. The local authority is required to publish the criteria for which schools can become eligible for Growth funding and the methodology for allocating it.
- 7.15. The Growth Fund is typically used to fund new Reception classes for schools taking one-off bulge classes or schools expanding their forms of entry (FE). However the DfE have now outlined the circumstances in which local authorities can vary pupil numbers used to set 2016-17 school budgets and have suggested that local authorities should request a variation to pupil numbers where there is permanent and significant change to pupil numbers; such as permanent expansions.
- 7.16. This will allow for the increase in pupil numbers to be reflected in all relevant funding formula factors and not just the marginal cost of basic pupil entitlement funding.
- 7.17. Additionally Growth Fund cannot be used for start-up funding for expansions or to support schools in financial difficulty.
- 7.18. The 2015-16 Growth Fund was allocated as per the following table:

	<b>Places 2015/16</b>	<b>7 Months Pro Rata (Sept 15 to March 16)</b>
Henry Cavendish Primary	60	£146,102
Hitherfield Primary	30	£73,051
Immanuel & St Andrew Primary	30	£73,051

## Lambeth Schools Forum meeting papers: 29<sup>th</sup> September 2015

Julians Primary	120	£288,146
Kingswood Primary	60	£146,102
Loughborough Primary	30	£73,051
Stockwell Primary	30	£73,051
Sunnyhill Primary	30	£73,051
Granton	30	£73,051
Elmwood	30	£73,051
Telferscot	30	£73,051
Dunraven	56	£137,985
Sudborne	15	£36,526
Woodmansterne	30	£77,110
St Johns Angel Town	30	£77,110
Paxton	30	£77,110
St Leonards	30	£73,051
		<hr/> £1,643,650

7.19. The current Lambeth 2015-16 Growth Fund Criteria is detailed in Appendix 14.1.

### **Action**

- **Forward Plan Ref 3: Agree Criteria for 2016-17.**
  - **SF to consider if the criteria is still relevant**
  - **If yes, no action is required**
  - **If no, propose changes**
  - **Note: the funding levels will be determined by the 2016/17 unit value of primary awpu x no of FE**

### **Targeted Special Educational Needs (SEN) funding**

- 7.20. Schools are responsible for funding the first £6,000 of support for pupils with SEN. However some schools attract a disproportionate number of pupils with types of SEN that is not able to be directly reflected by the DfE set funding formula factors. In these instances local authorities are encouraged to provide additional funding to the schools outside of the formula funding from the High Needs Block.
- 7.21. This additional SEN support funding must be allocated based on locally defined criteria which is clear, simple and applies to a minority of the authority's schools and academies. The DfE has now published examples of appropriate methods for allocating targeted SEN funding which it deems to be compliant with the School funding regulations.
- 7.22. Lambeth currently allocates £580,000pa to schools using a formula that targets funding to schools with a disproportionate number of pupils with Statements or Education Health & Care Plans (EHC) above the sector average. However the Schools Forum working group will be reviewing the current formula for revision in 2016-17 in consideration with the DfE suggested methodologies.



**Action**

- **Forward Plan Ref 7: Additional SEN funding support for disproportionate numbers of EHCPs and statements.**
  - **SF has an outstanding action to convene a sub group to review the criteria and funding arrangements for 2016/17**

**Falling rolls funding**

- 7.23. Local Authorities may top-slice the DSG in order to create a small fund to support good schools with falling rolls where local planning data show that the surplus places will be needed in the near future. Criteria for allocating falling rolls funding should contain clear objective trigger points for qualification and a clear formula for calculating allocations.
- 7.24. The budget set aside for 2015-16 is £585,000.
- 7.25. Current Distribution (2015-16)  
 (a) Only Archbishop Tenison meets the criteria qualifies through the formula and receives £52,116:

DfE No	School	School Ofsted	NDA Revised - NOR OCT 2014 Census - Reception and Year 7 (Excl SE)	PAN 2015/16	Movement of NOR over PAN	Percentage movement of NOR over PAN
2836	Glenbrook Primary School	Requires Improvement	46	60	-14	-30.43%
2292	Heathbrook Primary School	Requires Improvement	41	60	-19	-31.67%
3502	St. Mark's CE Primary School	Requires Improvement	22	30	-8	-26.67%
5403	Archbishop Tenison	Good	65	92	-27	-29.35%
4509	Saint Gabriel's College	Good	97	120	-23	-19.17%

School	School Ofsted	NOR OCT 2014 Census - Reception and Year 7 (Excl SEN)	PAN 2015/16	Movement of NOR over PAN	Percentage movement of NOR over PAN	Threshold (Falling Roll Numbers absorbed by the School)	Threshold (Falling Roll Numbers Funded by the LA)	Number of pupils to be funded by LA	Funding Allocation
Archbishop Tenison	Good	65	92	-27	-29.35%	-20.00%	-9.35%	8.60	£52,116.00

- (b) In addition, the Forum agreed that St Gabriel's would receive an allocation of £350,000 to support the downshifting from 5FE to 3FE.

- 7.26. The current Lambeth 2015-16 Falling Rolls Criteria is detailed in Appendix 14.2.

**Action**

- **Forward Plan Ref 4: Agree Criteria for 2016-17**
  - **SF to consider if the criteria is still relevant**
  - **If yes, no action is required**
  - **If no, propose changes**
  - **SF to agree approach on any non formulaic allocations**

**Split-Site funding**

- 7.27. Page 12 of the Schools Revenue funding 2016 to 2017 operational guide states that schools sharing facilities, federated schools and schools with remote sixth forms are not eligible for split-site funding. It also details examples of clear trigger points that can be used in setting split-site criteria.

- 7.28. Following on from the meeting on 19th May, where the Schools Forum consensus was that split-site funding should only be applicable to school sites within the Lambeth geographic boundary, the Schools Forum are now required to review the current Split-site eligibility criteria and agree the criteria for 2016-17.
- 7.29. A draft 2016-17 Split-site criteria is detailed in Appendix 14.3 and has been revised as per the previous Schools Forum discussions on this subject.

**Action**

- **Forward Plan Ref 1: Proposed changes to School Funding Formula for 2016-17**
  - **SF to consider is the revision to the split-site funding is appropriate.**

**Exceptional Requests to dis-apply the Minimum Funding Guarantee (MFG)**

- 7.30. Local Authorities need to submit an application to dis-apply the MFG for 2016-17 by the 30<sup>th</sup> September 2015. Exceptional requests will only be considered if there is a significant change in a school's circumstances or pupil numbers. Additionally the Education Funding Agency (EFA) will only consider applications where the inclusion of a factor in the MFG will lead to "significant inappropriate levels of protection".
- 7.31. For more information please see the source documents available here: <https://www.gov.uk/government/publications/schools-funding-arrangements-2016-to-2017>
- 7.32. The LA is not proposing to submit an application to dis-apply the MFG for any school in 2016-17.

**Action**

- **Forward Plan Ref 2: Formula exclusions to DfE**
  - **SF to consider if the decision to continue to apply the MFG to all primary & secondary schools is appropriate**
  - **If yes, no action is required**
  - **If no, propose which schools will not be subject to the MFG**

**8. Early Years Sub-Group**

- 8.1. The Early Year Sub-Group (EYSG) is a subset of the Schools Forum and should periodically report to the Schools Forum on all aspects of early years funding.
- 8.2. Its role is to explore the impact of funding decisions in relation to the sufficiency and quality of early years provision in Lambeth. As such, it will be considering any proposed changes to the Early years Single Funding Formula for 2016-17, with consideration of the future national changes to Early Years funding due to be implemented in April 2017, when the free-entitlement is increased from 15 hours per week to 30 hours per week.
- 8.3. It is not a decision making body but can make recommendations to the School Forum and the local authority with regard to future funding.

- 8.4. The EYSG should have representatives from all types of Lambeth early years provision, and as a subset of the Schools Forum a proportion of its membership should also sit on the Schools Forum.
- 8.5. Currently the Lambeth EYSG is seeking greater representation from the Maintained sector. Therefore we are seeking volunteers from the Primary and Nursery School Forum reps to also join the EYSG.

**Action:**

- **Forward Plan Action 6: Proposed changes to the Early Years Single Funding Formula for 2016-17**
  - **Schools Forum to nominate members to sit on the EYSG**
  - **Schools Forum to delegate the responsibility of reviewing any proposed changes for 2016-17 to the Early Years Single Funding Formula and report back to the Schools Forum by January 2016.**

**9. Early Years Pupil Premium Allocations (for noting)**

- 9.1. On 25th June 2014 the government published its consultation on Early Years Pupil Premium (EYPP). It sought views if the extension of pupil premium into the early years in order to better support the early education of disadvantage three and four year olds. The main findings of the consultation were wide support of the government proposal to extend the pupil premium to early years.
- 9.2. From April 2015 the EYPP became available for early years settings and the Department for Education has published guidance on how much funding local authorities will receive for the early year's pupil premium, and how they should distribute it to early year's providers
- 9.3. Three and four year olds in state-funded early education will attract EYPP funding if they or their family meet at least 1 of the following criteria:-
  - Income Support
  - Income based Job seekers Allowance
  - Income Related Employment and Support Allowance
  - Support under part VI of the Immigration and Asylum Act 1999
  - Guaranteed element of State Pension Credit
  - Child Tax Credit ( provided you are not entitled to Working Tax Credit and have an annual gross income of no more than £16,190)
  - Working Tax Credit run-on, which is paid for 4 weeks after they stop qualifying for working tax credit.
  - Currently "Looked After" by a local authority in England or Wales or have left care in England or Wales through an adoption, special guardianship order or a child arrangement order.
- 9.4. Children must receive part or all of their free early education of 570 hours in order to attract the EYPP funding.
- 9.5. Early years providers are responsible for identifying the eligible children and Local authorities are required to check the eligibility of the eligible children at least once a year.

- 9.6. All eligible early years providers are entitled to the national rate of 53p per hour per eligible pupil. This means that for 2015-16 providers will receive £302.10pa for each child who takes up the full 570 hours state funded early education. The Lambeth 2015-16 estimated allocation of EYPP is £485,000 based upon a headcount of 1,680 eligible children. Allocations are detailed in Appendix 14.4.
- 9.7. The Lambeth Early Years team have held a number of briefings leading up to April 2015 with all the early years providers detailing the process of how to identify pupils entitled to EYPP and how they can claim and correspondingly receive the funding.

**10. Alternative Provision Pupil Premium Grant funding arrangements (for noting)**

- 10.1. The pupil premium grant (PPG) is additional funding for publicly funded schools in England to raise the attainment of disadvantaged pupils and close the gap between them and their peers.
- 10.2. Pupil premium funding is available to:
- local authority maintained schools, including special schools and pupil referral units (PRUs)
  - voluntary-sector alternative provision (AP), with local authority agreement
  - special schools not maintained by the local authority (NMSS)
  - academies and free schools, including special and AP academies
- 10.3. PPG has also been allocated to each local authority for Ever 6 FSM pupils. For those eligible pupils attending schools not maintained by the local authority but for which the local authority is paying full tuition fees, such as pupils educated in a non-maintained special school, Pupil Premium Grant must be paid to the school as per the EFA grant guidance.
- 10.4. For other alternative provision pupils, the grant can be allocated to the setting where the child is being educated or held by the local authority to spend specifically on additional educational support to raise the standard of attainment for the aforementioned
- 10.5. The local authority must consult the non-mainstream settings about how to use the amount held by the local authority to support children educated in non-mainstream settings
- 10.6. Based on the EFA guidance, 2014-15 funding was paid directly to NMSS schools, however a number of these NMSS have contacted the Authority to say that would prefer for the Authority to retain the funding and spend it on behalf of the eligible pupils.
- 10.7. Therefore, for 2015-16, we are proposing to consult with all NMSS prior to payment and only distribute funding to those NMSS that demonstrate that they will spend the PPG in line with the grant conditions for the benefit of the eligible pupils. Otherwise we propose to spend the PPG accordingly.

### **11. Looked After Children Pupil Premium Grant (for noting)**

- 11.1. In February 2014 the DfE announced the Pupil Premium guidance for 2014-15 which included changes to funding allocation and utilisation of funds. These changes have been carried forward and are reflected in the conditions of grant for pupil premium arrangements 2015-2016.
- 11.2. The DfE will allocate to schools and LAs a provisional amount of £1,900 per child looked after for at least one day as recorded in the March 2014 children looked-after data return (SSDA903) and aged 4 to 15 at 31 August 2013. DfE will update and finalise this allocation in December 2015 based on the number of children looked after for at least one day as recorded in the March 2015 children looked-after data return (SSDA903) and aged 4 to 15 at 31 August 2014.
- 11.3. The Looked After Child (LAC) pupil premium must be managed by the designated virtual school head (VSH) and used for the benefit of the looked-after child's educational needs as described in their personal education plan (PEP). The VSH should ensure there are arrangements in place to discuss how the child will benefit from pupil premium funding with the designated teacher in the child's education setting.

### **2015-16 Funding Arrangement of Looked After Children Pupil Premium**

- 11.4. For 2015-16 the VSH will top-slice the Pupil Premium Plus (Looked After Child Pupil Premium) to enable additional funding to be targeted according to need and to provide additional resources to be held within the Virtual School team. It will help the Virtual Schools team provide services which will support children where necessary. It is anticipated that a large proportion of this funding will be used for children placed out of borough where services may be less well established or take longer to access.
- 11.5. Early Years Pupil Premium (EYPP), (up to £300), is available for looked after children who are taking up the free early education entitlement for 3 or 4 year-olds, including nurseries and child-minders. The Virtual School Head is responsible for identifying all of the eligible CLA wherever they receive their provision and for ensuring that early years providers spend the pupil premium funding they receive for children looked after effectively. If a provider subsequently receives an Ofsted rating of less than 'Good' this EYPP payment by the local authority will be stopped. The LA cannot however put restrictions on how this funding will be spent by the provider.

### **Top-slicing - Calculations and Proposals for use of Centrally Retained Funds**

- 11.6. Based on the £1900 per pupil allocation of 2015/16 the virtual schools team will be top slicing £400 per pupil to held centrally to provide additional resources where necessary. Early years Pupil Premium will not be top-sliced.
- 11.7. The Virtual School will release the remaining funding of £1500 in 3 instalments.  
**Period 1:** April – July; £500 will be paid in July to all schools regardless of whether there is a PEP in place or not.  
**Period 2:** Sept – Dec; £500 will be paid in December  
**Period 3:** Jan – Mar; £500 will be paid in February
- 11.8. More information can be found on the following links

<https://www.gov.uk/guidance/pupil-premium-information-for-schools-and-alternative-provision-settings>

<https://www.gov.uk/guidance/pupil-premium-virtual-school-heads-responsibilities>

## 12. Locally Managed Schools (LMS) Balances

12.1. On a like- for- like basis, total surplus balance increased from £18.15m to £20.13m. During the year, the Pupil Referral Units converted to academy status and accordingly their closing balance, totalling £0.16m was transferred to the new successor academy.

LMS BALANCE	2014-15 £'000	2013-14 £'000
Balance at 01 April	18,150,133	15,689,153
Overspent School Balances	-2,312,442	-2,225,032
Underspent School Balances	4,295,674	4,686,012
	<b>20,133,365</b>	<b>18,150,133</b>
<b>Adjustment for Schools becoming Academies</b>		
Lambeth Alternative Education Pupil Referral Unit	-162,855	0
Balance at 31 March	<b>19,970,510</b>	<b>18,150,133</b>

12.2. All sectors, apart from the Nursery schools, increased the level of surplus balances:

	14/15 In Year Surplus /(deficit)	13/14 B/f Figure Surplus / (Deficit)	14/15 C/F Surplus/ (Deficit)
Nurseries	(1,893.69)	739,977.14	738,083.45
Primaries	1,111,394.19	13,312,204.34	14,423,598.53
Secondaries	388,644.62	3,124,665.25	3,513,309.87
Special	485,086.98	973,286.67	1,458,373.65
<b>Total</b>	<b>1,983,232.10</b>	<b>18,150,133.40</b>	<b>20,133,365.50</b>

12.3. There was a small increase in the total level deficit balances increased by £87k although there was a fall in the number of school reporting a deficit (from 7 to 5).

## 13. AOB and future dates

13.1. Trade union facility time (RT)

13.2. Members to consider additional meeting before 30<sup>th</sup> October 2015 (NJ)

Future dates:

- Tuesday 12<sup>th</sup> January 2016
- Tuesday 15<sup>th</sup> March 2016

## 14. Appendices

### 14.1. Growth Fund Criteria

This document outlines the purpose of the centrally retained Dedicated Schools Grant (DSG) Schools Growth Fund and the basis in which it will be distributed to eligible schools by the Authority.

Under the Schools Finance (England) Regulations of 2012, local authorities, with the agreement of the Schools Forum, are permitted to retain DSG to form a specific schools' contingency to support those schools that, with the prior agreement of the Authority, are permanently expanding and those schools experiencing significant in-year pupil roll increases. This specific schools' contingency is known as the Schools Growth Fund.

#### **Schools Growth Fund eligibility criteria:**

In order to qualify for Schools Growth Fund funding, schools are required to formally request and obtain written approval to expand from the Strategic Director of Commissioning prior to school expansion.

The Authority may make an allocation from the Schools Growth Fund in respect of expenditure for the education of the additional pupils, who have joined the school after beginning of the Autumn term during the financial year, where without this expenditure the education of these pupils would be seriously impaired and because of both the size and unexpectedness of the expenditure, it would be unreasonable to expect the governing body to meet these costs from the school's budget share.

Permanently expanding schools will qualify for Schools Growth Fund funding for each year of the expansion phase programme. For primary schools with will typically be 7 years and correspondingly may be 5 years for secondary schools.

#### **Schools Growth Fund funding allocations:**

The calculation method in allocating the Schools Growth Fund payment will be based on the following:

#### **For permanently expanding schools / schools taking one-off bulge classes**

- Age Weighted Pupil Unit (AWPU) basic entitlement funding x the planned number of additional pupils to be admitted in the Autumn term x 7/12 months.
- This funding is equivalent to pro-rata financial-year (September to March) funding for the number of additional pupils expected to join the school in the Autumn as a result of the temporary expansion within a particular year group.
- This funding is intended to support the additional direct revenue costs associated with the expansion; teaching and support staffing costs, resourcing equipment for the classrooms and senior management costs.

Payments from the Schools Growth Fund will be profiled over the period for which they cover and will be paid with the monthly budget share payments to schools.

## 14.2. Falling Rolls Criteria

### 1 Introduction

- 1.1 The ability for Local Authorities to set criteria for a falling rolls fund was introduced by the Department for Education (DfE) from 2014/15 to ensure schools do not unduly face instability. The key aim of the fund is to protect schools from undue hardship and costly restructuring which may have been caused by change or movement of demographics which is anticipated to be short term.
- 1.2 Local Authorities may top slice the DSG in order to create a small fund to support to good or outstanding schools with falling rolls where local planning data show that the surplus places will be needed in the near future.

### 2 Criteria

- 2.1 The criteria agreed by the Schools Form and which conforms to the DfE guidelines are:
- 2.1.1 Support is available only for schools judged Good or Outstanding at their last Ofsted inspection .
  - 2.1.2 Threshold for funding to be set at over 20%, therefore the school will absorb falling rolls of less than 20%.
  - 2.1.3 Growing schools do not qualify for falling rolls funding
  - 2.1.4 Pupils in Special Units are excluded.

To qualify, schools must meet all the criteria

### 3 Exceptions

- 3.1 There is an agreement from the Schools Forum, that the Local Authority can bring funding proposals for schools that do not meet all of the qualifying criteria for the Forum's consideration, on an exceptional basis.
- 3.2 Such cases must be brought to the Schools Forum for agreement on an annual basis as any agreement only covers one funding period (year).

### 4 Funding

- 4.1 Funding will be top-sliced from the annual allocation of the Dedicated Schools Grant. The amount of the budget for 2015/16 is of £585,000.
- 4.2 If the total allocations for qualifying schools exceeds the annual budget, then the amounts will be revised downwards proportionately, to the amount of the budget available.



4.3 Any funding unallocated is carried forward and added to the following years DSG.

## 5 Methodology

5.1 Funding is based on the prevailing school sector average weighted pupil unit (AWPU), which set in the Authority's funding formula for key stages. For primary schools this is KS1 awpu unit value and for secondary schools, KS3.

5.2 The formula determines the difference between the number on roll (NOR) recorded in the October pupil census and the planned admissions number (PAN) for the academic year in question. For primary schools, the NOR is Reception year- group and for secondary, it is year- group 7.

5.3 This difference between the NOR and PAN is expressed at a percentage of PAN.

5.4 If the % change exceeds 20%, then number of pupils above this level are funded at the prevailing awpu.

Funding will be paid in equal instalments over the financial year.

### 14.3. Draft 2016-17 Split-site Criteria

Schools and Academies whose accommodation is on two or more sites separated may receive a supplementary funding allocation if:

- The sites are separated by a main road, within the Lambeth geographic boundary, and necessitating movement between sites of staff and /or pupils during the school day.
- Additionally both sites must have the same Unique Reference Number (URN) and DfE Establishment Number.

Split-site funding is allocated relating to a points score according to the distance between the school sites.

Each split-site point is worth £19,306.32.

Schools supported by a Federation are not eligible for split-site points on the basis of the school being federated.

Split Site Points scoring:

- Primary school on two sites less than 1/4 mile apart = 1 point
- Primary school on two sites more than 1/4 mile apart = 3 points
- Secondary school on two sites less than 1/4 mile apart = 3 points
- Secondary school on two sites more than 1/4 mile apart = 5 points

Lambeth Schools Forum meeting papers: 29<sup>th</sup> September 2015

14.4. 2015-16 Early Years Pupil Premium

DCSF URN	SCHOOL	No. of Children entitled Summer Headcount	Total EYPP Summer Funding £ Jul-15
	Termly Payment Per Pupil		£100.70
<b>NURSERY SCHOOLS</b>			
1043	Effra Nursery	42	4,229.40
1049	Ethelred Nursery	42	4,229.40
1058	Holmewood Nursery	45	4,531.50
1055	Maytree Nursery	42	4,229.40
1027	Triangle Nursery	28	2,819.60
	<b>Nursery Total</b>	<b>199</b>	<b>20,039.30</b>
<b>PRIMARY SCHOOLS</b>			
2808	Allen Edwards Primary School	25	2,517.50
3307	Archbishop Sumner CE Primary School	8	805.60
2022	Ashmole Primary School	9	906.30
2897	Bonneville Primary School	15	1,510.50
3324	Christ Church Brixton C E School	6	604.20
3329	Christ Church Streatham C E School	0	0.00
2115	Clapham Manor School	9	906.30
5202	Corpus Christi Catholic Primary Academy	4	402.80
2783	Crown Lane Primary School	9	906.30
5207	Durand Primary School	23	2,316.10
2794	Elm Wood Primary School	7	704.90
2785	Fenstanton Primary School	31	3,121.70
2836	Glenbrook Primary School	7	704.90
2265	Granton Primary School	12	1,208.40
2292	Heathbrook Primary School	8	805.60
2295	Henry Cavendish Primary School	8	805.60
2901	Henry Fawcett Primary School	19	1,913.30
2868	Herbert Morrison Primary School	11	1,107.70
2898	Hillmead Primary School	20	2,014.00
2900	Hitherfield Primary School	15	1,510.50
3621	Holy Trinity C E Primary School	0	0.00
5205	Immanuel & St Andrew Primary School	9	906.30
3643	Iqra Primary School	16	1,611.20
2331	Jessop Primary School	7	704.90
2332	Johanna Primary School	15	1,510.50
3000	Jubilee Primary School	16	1,611.20
5209	Julians Primary School	0	0.00
2903	King's Avenue Primary School	24	2,416.80
2359	Kingswood Primary School	18	1,812.60
2371	Lark Hall Primary School	18	1,812.60
2905	Loughborough Primary School	48	4,833.60
3375	Maccauley C E Primary School	3	302.10
3642	Orchard Primary School	0	0.00
2459	Paxton Primary School	12	1,208.40
2504	Richard Atkins Primary School	6	604.20
2899	Rosendale Primary School	3	302.10
5204	St Andrew's Catholic Primary School	0	0.00
3403	St Andrew's C E Primary School	0	0.00
5201	St Anne's Catholic Primary School	5	503.50
5203	St Bede's Catholic Infant School	14	1,409.80
5200	St Bernadette's Catholic Junior School	0	0.00
3641	St Helen's Catholic School	0	0.00
3457	St John The Divine C E Primary School	7	704.90
3466	St John's (Angell Town) C E Primary School	5	503.50
3491	St Jude's C E Primary School	0	0.00
3493	St Leonard's C E Primary School	0	0.00
3499	St Luke's C E Primary School	0	0.00
3502	St Mark's C E Primary School	0	0.00
5208	St Mary's Roman Catholic Primary School	3	302.10
3589	St Saviours C E Primary School	0	0.00
3596	St Stephen's C E Primary School	10	1,007.00
2902	Stockwell Primary School	13	1,309.10
2895	Streatham Wells Primary School	6	604.20
2575	Sudbourne Primary School	5	503.50
2578	Sunnyhill Primary School	23	2,316.10
2591	Telferscot Primary School	6	604.20
5206	The Reay Primary School	20	2,014.00
2617	Vauxhall Primary School	21	2,114.70
2626	Walnut Tree Walk Primary School	3	302.10
2657	Woodmansterne Primary School	0	0.00
2664	Wyvil Primary School	68	6,847.60
	<b>Primary Total</b>	<b>650</b>	<b>£65,455.00</b>
<b>SPECIAL SCHOOLS</b>			
7194	Livity	2	201.40
	<b>Primary Total</b>	<b>2</b>	<b>£201.40</b>
<b>PVI Sector</b>		<b>175</b>	<b>17,500.00</b>
	<b>Total</b>	<b>1,026</b>	<b>£103,195.70</b>