

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

Wednesday 27th September 2017

18:00pm – 20.00pm

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**Hitherfield Primary School
Leigham Vale,
Streatham,
SW16 2JQ**

for the transaction of the business set out below.

Agenda

Time*	Item	
18.00	1.	Apologies & welcome
	2.	Election of a new Chair for the Lambeth Schools Forum
	3.	Draft minutes from the Schools Forum meeting held 18th January 2017
	4.	Matters Arising
	5.	Membership
	6.	Register of Interests and Declaration of New Interests
18:10	7.	Schools Forum Forward Plan 2017/18
18.20	8.	National Funding Arrangements 2018/19
19:00	9.	Early Years Funding Arrangements 2018/19
19:15	10.	De-Delegation 2018/19
19:30	11.	De-Delegation 2017/18 - Vulnerable Schools Fund
	12.	Any Other business (AOB)
	13.	Future Meeting Dates

Next meeting:

1. **Welcome & apologies**

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

2. **Election for the Chair of the Schools Forum**

Richard Thornhill has left the Loughborough Federation and is no longer a Lambeth Schools Head Teacher. Accordingly, Members will need to elect a new Chair for the Lambeth Schools Forum.

3. **Draft minutes from the Schools Forum meeting held 18th January 2017**

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

4. **Matters Arising**

None

5. **Membership**

**Vacancies Remaining
School Members**

- 1 x VA 'Headteacher
- 1 x Primary Community Governor representative
- 1 x Primary VA representative

6. **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 2017/18 financial year

Action:

- ***All new members to submit declaration of interests for 2017-18***

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TYPE OF MEMBER	GROUP	SUB GROUP	SUB SUB GROUP	NAME	SCHOOL	MEMBERSHIP START DATE	MEMBERSHIP EXPIRY DATE	Term of service
School	Primary	C	Headteacher	Alexandra Hardy	Henry Cavendish	03 November 2010	03 November 2018	2
School	Primary	C	Headteacher	Chris Ashley-Jones (Vice-Chair from May 2015)	Hitherfield Primary	14 May 2014	14 May 2018	1
School	Primary	C	Headteacher	VACANT	VACANT			
School	Primary	VA	Headteacher	VACANT	VACANT			
School	Primary	VA	Headteacher	Jayne Mitchel	St Andrews CE	14 May 2014	14 May 2018	1
School	Primary	C	Governor	Kate Mason	Stockwell Primary	14 May 2014	14 May 2018	1
School	Primary	C	Governor	Matthew Green	Telferscot	06 December 2011	06 December 2019	2
School	Primary	VA	Governor	Rickard Jonsson	St. Stephen's CE Primary School	18 January 2017	18 January 2021	1
School	Primary	C	Governor	VACANT	VACANT			
School	Primary	C	Governor	Tony Andrews	Wyvern Federation	13 July 2016	13 July 2020	1
School	Secondary	VA / VC	Headteacher	Nick Butler	St Gabriel's College	01 October 2014	30 September 2018	1
School	Secondary	A	Principal	David Boyle	Dunraven Academy	29 September 2015	29 September 2019	1
School	Secondary	VA	Governor	Roger Bowdery	Bishop Thomas Grant	29 September 2015	29 September 2019	1
School	Secondary	VA/C	Governor	Linda Collins	La Retraite RC School	18 January 2017	18 January 2021	1
School	Secondary	A	Principal	Jan Shadick	Lambeth Academy	21 February 2012	21 February 2016	1
School	Special	C	Headteacher	Marilyn Ross	Michael Tippett	29 September 2015	29 September 2019	1
School	Nursery	C	Headteacher	Glenda King	Ethelred	12 January 2016	12 January 2020	1
Non School	PRU		Principal	Joe Blacker - TBR	Parallel Learning Trust	12 January 2016	12 January 2020	1
Non School	PVI		Manager	Raymond Smith	Pre-School Learning Alliance	02 October 2014	01 October 2018	1
Non School	PVI		Manager	Marcia Hosain	Horizons Day Nursery	02 October 2014	01 October 2018	1
Non School	16-19 Partnership		Vice Principal	Paul Cox	Lambeth College	29 September 2015	29 September 2019	1
Non School	Faith Body		Governor	Maksud Gangat	Orchard School	12 November 2014	12 November 2018	1
							TOTAL	
LAMBETH SCHOOLS MEMBER SUBSTITUTES POOL MEMBERSHIP								
TYPE OF MEMBER	GROUP	SUB GROUP	SUB SUB GROUP	NAME	SCHOOL	MEMBERSHIP START DATE	MEMBERSHIP EXPIRY DATE	
School Sub			Headteacher	Magdalin Babiker-Clancy	Lambeth Academy	21 February 2012	21 February 2016	
Non School Sub	PVI		Manager	Sade Okocha	Oaktree Day Nursery	02 October 2014	01 October 2018	
							TOTAL	

Pro-Forma Register of Business Interests 2017-18

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 2017

7. Schools Forum Forward Plan 2017/18

- 5 October 2017:** School census day. October / November 2017 DfE and local authorities check and validate school census
- 30 November 2017:** School census database closed. Deadline for submitting requests for:
- MFG exclusions
 - exceptional premises factors
 - sparsity factors
 - lump sum variations for amalgamating schools
 - pupil number reductions
 - movement of funding out of the schools block above the limit of 0.5% and/or which the schools forum has not approved
- Mid-December 2017:** APT issued to local authorities, containing October 2017 census-based pupil data and factors
Publication of DSG schools block and high needs block allocations for 2018 to 2019 (prior to academy recoupment)
Publication of provisional early years block allocations
- Mid-January 2018:** Schools forum consultation / political approval required for final 2018 to 2019 funding formula
- 19 January 2018:** Deadline for submission of final 2018 to 2019 APT to ESFA
- 28 February 2018** Deadline for confirmation of schools budget shares to mainstream maintained schools

Actions for meeting held 27 September 2017

- a) Review current funding formula to
- a. Recommend no changes
 - b. Recommend review
 - i. Specify which factors/ indicators to be reviewed
 - ii. Set up review committee
- b) Review Criteria for Growth Fund
- a. Recommend no changes
 - b. Recommend review
 - i. Set up review committee
- c) Review Criteria and funding level for Falling Rolls Fund
- a. Recommend no changes
 - b. Recommend review
 - i. Set up review committee
- d) Review Criteria and funding level for Dis-proportionate SEN Fund
- a. Recommend no changes
 - b. Recommend review
 - i. Set up review committee

- e) **Review 2018/19 De-Delegation for TU Facilities (£116k) and Education Support Functions (£249k)**
 - a. **Recommend no changes**
 - b. **Recommend review**
 - i. **Set up review committee**

- f) **Ratify 2017/18 De-Delegation for Education Support Functions**

8. National Funding Arrangements 2018/19

8.1. Ministerial Statement

- Introduction of the hard national funding formula delayed to April 2020.
- Next two years will be transitional with the national funding formula setting indicative budgets for each school, and the total schools funding received by each local authority will be allocated according to the national fair funding formula.
- Local authorities will continue to set a local formula to distribute that funding, and to determine individual schools' budgets in 2018 19 and 2019-20, in consultation with schools in the area.
- In each of the transitional years, additional funding will be provided which will give 3% gains a year per pupil for underfunded schools, and a 0.5% a year per pupil cash increase for every school;
- By 2019-20 this will provide at least £4,800 per pupil for every secondary school,(Lambeth 2017/18 £5,893)
- All primary schools will receive an increase in their PE and sports premium funding in the next academic year.
- The minimum funding guarantee (MFG) for schools will continue, but local authorities will have the flexibility to set a local MFG between 0% and minus 1.5% per pupil.
- The schools block will be ring-fenced from 2018 to 2019, but local authorities will be able to transfer up to 0.5% of their schools block funding out with the agreement of their schools forum.
- there will no longer be a deduction to schools block pupil numbers for high needs places in mainstream schools. Instead, the school's budget share (or the equivalent academy funding) will be determined on the basis of the total number of pupils on the roll of the school, including those in the special unit or resourced provision. An adjustment has been made between the high needs block and schools block for each local authority to reflect this change.
- Whilst the growth fund is a suitable route for short-term increases in pupil numbers and bulge classes, local authorities should vary pupil numbers in situations where the scale of change in numbers is sufficiently great and permanent that it should be applied to all factors in the formula.
- Regulations require local authorities to provide estimated numbers on the APT for new schools and schools that have opened in the last seven years that don't yet have pupils in every year group. For a school to be classed as a growing school it has to have opened in the last seven years and not have all year groups present yet. Academies with predecessor schools are not considered as new schools for this purpose.

8.2. Review of the 2017/18 Lambeth Schools Funding Formula

- Factors, Units and Funding

Factor	Indicator	Units	£ per Unit	Total Funding
1) Primary (Years R-6)	number on roll	21,951	£3,958	£86,882,058
Key Stage 3 (Years 7-9)	number on roll	6,862	£5,825	£39,971,150
Key Stage 4 (Years 10-11)	number on roll	4,279	£6,002	£25,682,558
2) FSM6 % Primary	FSM 6	9,144	£780	£7,132,076
FSM6 % Secondary	FSM 6	6,213	£780	£4,846,238
3) Looked After Children	LAC X March 16	133	£0	£0
4) EAL	EAL 3 Primary	6,193	£682	£4,224,044
	EAL 3 Secondary	763	£2,309	£1,760,748
5) Mobility	Primary	132	£1,531	£202,150
	Secondary	15	£1,531	£22,227
6) Prior attainment	Primary Low prior attainment	5,241	£739	£3,873,384
	Secondary low attainment	2,339	£1,894	£4,430,829
7) Lump Sum			£170,000	£13,260,000
8) Sparsity Factor				£0
9) Fringe Payments				£0
10) Split Sites		23	£19,306	£444,045
11) Total 17-18 Rates		78		£3,085,761
12) PFI funding		1	£200,000	£200,000
				£196,017,270
MFG Adjustment				£8,387,498
				£204,404,768
De-delegation –	TU Facilities			-£115,646
De-delegation –	Education Functions			-£249,280
Total ISB				£204,039,842

8.3. Changes Proposed for 2018/19

- The Council is not proposing any changes to the local funding formula.

- **Schools Forum to:**

- **Agree with the Council's recommendation, or**

- **Propose changes to be made in respect of :**

Factors: All bar the 'basic entitlement' are optional

Indicators: Deprivation- option to use current FSM pupils rather than FSM6

EAL- option to use current EAL pupils rather than EAL3 (3 years data)

Prior Attainment: choice of two EYFSP scores, targeting funding to either all pupils who achieved fewer than 78 points or all pupils who achieved fewer than 73 points on the EYFSP. Current Formula uses 78 points

8.4. Growth Fund

- The growth fund can be used only for the purposes of supporting growth in pre-16 pupil numbers to meet basic need, to support additional classes needed to meet the infant class size regulation and to meet the costs of new schools.
- Local authorities are responsible for funding these growth needs for all schools in their area: both new and existing and both academies and maintained schools. They should fund all schools on the same criteria, discussed below. Where growth occurs in academies that are funded by ESFA on estimates, ESFA will ensure through the Pupil Number Adjustments that the academy is only funded for the growth once.
- The costs of new schools will include the lead-in costs, for example to fund the appointment of staff and the purchase of any goods or services necessary in order to admit pupils. They will also include post start-up and diseconomy of scale costs. These pre and post start-up costs should be provided for academies where they are created to meet basic need. ESFA will continue to fund start-up and diseconomy costs for new free schools where they are not being opened to meet the need for a new school as referred to in section 6A of the Education and Inspections Act 2006.
- The growth fund may not be used to support schools in financial difficulty (any such support for maintained schools would be provided from a de-delegated contingency) or general growth due to popularity, which is managed through lagged funding.
- The growth fund may not be the most appropriate source of funding for growing schools and local authorities should consider varying pupil numbers where there is a more permanent and significant change to numbers and where it's appropriate for the change to be reflected in the funding formula. Authorities will not need to submit a disapplication request for an increase to numbers where this is due to a change to the admission limit or a local reorganisation.
- Local authorities are required to produce criteria on which any growth funding is to be allocated, which must be agreed by the schools forum. The schools forum must also be consulted on the total size of the growth fund from each phase and should receive regular updates on the use of the funding. ESFA will check the criteria for compliance with the regulations.
- The criteria should provide a transparent and consistent basis for the allocation of funding, which may be different for each phase. Criteria for allocating growth funds should contain clear objective trigger points for qualification and a clear formula for calculating allocations with these criteria applying to all schools on the same basis.
- **Action: Schools Forum to review the criteria (appendix) for appropriateness and recommend changes.**

8.5. Falling Rolls Fund

- Local authorities may set aside schools block funding to create a small fund to support good schools with falling rolls, where local planning data show that the surplus places will be needed within the next three financial years. The schools forum should agree both the value of the fund and the criteria for

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allocation, and the local authority should regularly update the schools forum on the use of the funding. As with the growth fund, the falling rolls fund is also within the NFF schools block.

- Criteria for allocating falling rolls funding should contain clear objective trigger points for qualification and a clear formula for calculating allocations. Differences in allocation methodology are permitted between phases
- The 2017/18 recipients of the fund are:

School	PAN 2017/2018	NOR Oct-16	Movement of NOR over PAN	Percentage movement of NOR over PAN	Threshold Unfunded	% Funded	Number of pupils to be funded by LA	Total Funding based on APWU	Total Funding Scaled back to Budget
Glenbrook Primary School	60	26	-34	-56.67%	-20.00%	36.67%	-27	£109,576.80	£75,214.29
Herbert Morrison Primary School	28	16	-12	-42.86%	-20.00%	22.86%	-9	£36,525.60	£25,071.43
Lark Hall Primary School (Including Lark Hall C	60	35	-25	-41.67%	-20.00%	21.67%	-20	£81,168.00	£55,714.29
Holy Trinity Church of England Primary Schoo	60	36	-24	-40.00%	-20.00%	20.00%	-19	£77,109.60	£52,928.57
St Mark's Church of England Primary School	30	18	-12	-40.00%	-20.00%	20.00%	-9	£36,525.60	£25,071.43
St Martin in the Fields High School for Girls	140	85	-55	-39.29%	-20.00%	19.29%	-44	£178,569.60	£122,571.43
Loughborough Primary School	90	56	-34	-37.78%	-20.00%	17.78%	-27	£109,576.80	£75,214.29
Richard Atkins Primary School	60	38	-22	-36.67%	-20.00%	16.67%	-17	£68,992.80	£47,357.14
Henry Fawcett Primary School	60	40	-20	-33.33%	-20.00%	13.33%	-16	£64,934.40	£44,571.43
Jubilee Primary School	60	40	-20	-33.33%	-20.00%	13.33%	-16	£64,934.40	£44,571.43
St John the Divine Church of England Primary	30	22	-8	-26.67%	-20.00%	6.67%	-6	£24,350.40	£16,714.29
Totals							-210.00	£852,264.00	£585,000.00

- **Action: Schools Forum to review the:**
 - **Criteria (appendix) for appropriateness and recommend changes**
 - **Set the amount of the fund**

8.6. Dis-Proportionate SEN Fund

- The Local authorities can provide additional targeted support to individual schools from its high needs block where it would be unreasonable to expect the first £6,000 of support for that schools high needs pupils to be met by them from its formula funding due to an exceptional number of such pupils on its roll.
- The guidance from the DfE has stated that the additional funding paid to schools should be formulaic based on the number of high needs pupils in each school. It cannot take into account lower level needs of pupils. The formula or criteria should be as clear and simple as possible, and should be devised so that additional funds are targeted only to a minority of schools which have particular difficulties because of their disproportionate number of high needs pupils or their characteristics.
- The Dis-Proportionate SEN funding is allocated through determining the average % of EHCPs for each phase taking pupil data recorded in the autumn census. The calculation determines the number of ECHPs above the phase average which is divided by the total funding available to arrive at a unit value per EHCP.
- The value of the fund is currently set at £1,580,000.
- **Action: Schools Forum to review the:**
 - **Criteria for appropriateness and recommend changes**
 - **Set the amount of the fund**

9. Early Years Funding Arrangements 2018/19

- The Delivery Lead for Early Years will be reviewing the take up of the additional 15 hours funding for discussion at the EYSG and SF. The timescale for this will be the autumn term, given that the offer only commenced from September 2017.
- However in accordance with the EY funding guidance, maintained providers will no longer be eligible for full time places funding as all funding will be delivered through the core 15 hours and the additional 15 hours for eligible parents.
- **Action: Head of Early Years to set timetable for review of the implementation and arrangements for 2018/19**

10. De-Delegation 2018/19

- The current funding formula has 2 de-delegations for :
 - Trades Union Facilities £115,646
 - Education Support Services: Vulnerable Schools Fund £249,280
- **Schools Forum to review the de-delegations for 2018/19 and**
 - **Recommend no changes**
 - **Recommend review**

11. De-Delegation 2017/18 : Vulnerable Schools Fund

Introduction

10.1.1 Working closely with schools, Lambeth LA have ensured that in recent years our schools have performed at levels that are amongst the best in the country. Currently 96% of schools are judged to be 'good' or better with 41% judged 'outstanding'. Outcomes for pupils at all key stages are above national averages. Our pupils achieve well including those with SEN and from different groups. This success has not come about by chance: our policy for quality assurance and improvement has meant that there are very tightly managed systems for overseeing education performance; recruiting and retaining the best leaders; supporting and challenging all schools and intervening swiftly when needed to avoid school failure. We have had a positive approach to collaboration and support and most schools work in partnerships or clusters. As funding for school improvement is reduced new ways of ensuring that schools are supported to maintain high standards have been sought.

10.1.2 There are very real dangers of fragmentation of provision, support and challenge with many new academy chains; multi-academy trusts and individual academies joining the local schools 'market' making it more difficult for all local schools to be well known and supported. All schools are also facing unprecedented financial challenges and this makes sustaining strong leadership teams and high quality teaching teams more challenging.

10.1.3 To mitigate against fragmentation and the loss of opportunities for maintaining mutual support within a rigorous framework of local monitoring and oversight Lambeth Council working with schools has developed the **Lambeth Schools Partnership**. This

was launched in May 2017 and with 80 out of 87 schools having currently joined the Partnership this will be a powerful means of keeping the Lambeth family of schools working together. It is open to all publicly funded schools in Lambeth no matter how they are governed. The level of commitment shown so far indicates a high level of confidence and trust in the Partnership proposals.

10.1.4 The **Lambeth Schools Partnership** is a joint venture between the Council and schools and has an elected board: it will appoint an independent Chair in the Autumn. Its aims are to offer high quality school improvement to all members and a co-ordinated support and training offer from the Council, our three Teaching Schools and our Clusters of schools. With the Council the Partnership will also monitor education standards and provision in Lambeth and liaise with external bodies such as the Regional Schools Commissioner, Ofsted and the DfE/ ESFA.

10.1.5 All schools that subscribe will have access to school improvement, training and mutual support as well as the opportunities to work across a range of schools and develop a borough wide programme of activities - for example joint recruitment drives, policy development and research.

10.1.6 However, there are occasions when schools require intensive additional support for a range of reasons. Our research shows us that all urban schools are vulnerable and no matter what their Ofsted grade they may need swift intervention. This may be because of safeguarding issues, a number of staff members leaving unexpectedly, a dip in results, coping with the impact of falling rolls or budget problems or because of areas of poor leadership, governance or management. In these cases schools are currently supported as quickly as possible by co-ordinated support, which may include additional SIA support, HR, finance, curriculum, governance, external consultancy etc. All of this costs money, which a vulnerable school may not have access to at the point at which it is needed. LA funds for school improvement have dramatically declined and therefore this request is being made. The Education Services Grant (ESG) will reduce to zero by September 2017 but the local responsibilities and accountabilities remain.

10.1.7 In order to maintain the capacity to offer co-ordinated and swift support and intervention the request has been made to Schools Forum for a vulnerable schools 'fund' of **£250,000**, which will be de-delegated from schools budgets and be held as a fund to draw down to support schools identified as requiring additional support via the School Improvement Monitoring Group (SIMG) which oversees standards in all Lambeth schools. There are clear criteria for identifying schools that fall into a particular category of support: these are reviewed three times a year and schools informed.

10.1.8 The new **Lambeth Schools Partnership** will be informed of the number of schools in each category so that they can monitor improvement and support. It is proposed that schools requiring additional intensive support will be supported using funding from the **Vulnerable Schools Fund**: this might pay for additional school improvement adviser support, consultancy, training, secondment of a leader/s from another school, coaching etc. The costs of the additional support are identified within an action plan, monitored and overseen by the Director of Education, and reported to and approved by the School Improvement Monitoring Group (SIMG). It is proposed that any spend from the Vulnerable Schools Fund is reported to **Schools Forum** three times a year.

10.1.9 It is proposed that the Fund is called the '**Lambeth Vulnerable Schools Fund**'. It is not anticipated that the whole fund would necessarily be used in one year. The amount to be de-delegated would therefore be reviewed annually. Currently between 12% and 19%

of schools receive additional support at any one time. Immediate or early support is important as the costs of school failure are high and long lasting.

Table to indicate Lambeth schools ranking in HMCI Reports 2013 - 2016:

HMCI report published December annually	Primary % good+	National Ranking /150	Secondary% good+	National ranking /150
2013/ 14	87	11	92	7
2014/15	90	=9	100	=1
2015/16	93	=8	100	=1

10.2 Identifying Vulnerable Schools

10.2.1 Support for school improvement is carried out by School Improvement Advisers (SIAs) and a range of other partners and Lambeth officers and outcomes and standards are monitored by the **School Improvement Monitoring Group (SIMG)** which meets termly and is chaired by the Director of Education, Learning and Skills (ELS). Schools identified as Vulnerable are referred to SIMG for inclusion in Category B1 B2 or C according to need. Only some schools in B1 and schools in B2 or C would be eligible for this fund.

10.2.2 Schools identified as Category A are not classed as Vulnerable and therefore fall outside of this Fund, however intervention may be required if there is re-categorisation to B1, B2 or C.

10.2.3 Categorisation of schools that require support is based on the following criteria:

B1 : Good with satisfactory capacity to move to the next category or Requires improvement with good capacity to move to the next category. Support in this category may be short term for a new leadership team for example.

B2: Requires improvement with limited capacity to improve. Support in this category will be more intensive and far reaching.

C: Requiring improvement / Inadequate as judged by Ofsted and/ or the LA; serious weaknesses; special measures. Support in this category will be significant and working alongside other partners for example the Regional Schools Commissioner.

10.3 Categorisation process and proposed eligibility for support from the Vulnerable Schools Fund.

10.3.1 All schools receive a letter confirming their category according to the above criteria. **If SIMG confirms that an LA school is vulnerable at B1, B2 or C and requires intervention or additional support to address specific concerns, it can then be provided with a costed, tailored package. This will include an Action Plan monitored by an Action Group consisting of school staff and relevant officers from across the LA and any partners.**

10.3.2 The Headteacher and Chair of Governors receive a **formal letter explaining the areas of concern and the timeframe expected for improvement.** The timetable is

published below (see 3.10) In addition a termly update letter is sent giving the outcome from the latest SIMG meeting.

10.3.3 Schools identified as vulnerable will be **moved as quickly as possible** to a position where the support is no longer required - within a year wherever possible. This will be achieved by appropriate intervention, support and monitoring, so schools can implement changes to ensure high quality leadership, outcomes and provision for its pupils including a safe and appropriate environment.

10.3.4 If there are particular issues relating to **standards or leadership**, wherever possible the LA will work with the school to broker positive arrangements that will support improvement such as partnerships, federations and temporary additional leadership and/or other staff members. If a school is judged to require **external support from another school**, including a school within the same cluster partnership, the partner school will have the capacity to support the Vulnerable school without compromising its own capability.

10.3.5 During the Autumn term of each academic year, Headteachers and Chairs of Governors of schools judged as Vulnerable or with falling results **may be invited to discuss progress, achievement and attainment with the Director of Education, Learning and Skills**.

10.3.6 The Director ELS will also ensure that **extra support is given for Headteachers who are new in post** so that outcomes for children can be maintained and/or improved as quickly as possible.

10.3.7 For full details of categorisation criteria, intervention and support please see Lambeth Policy for *School Improvement and Quality Assurance 2016 -2018*.

10.3.8 It is proposed that **Schools Forum** and the **Lambeth Schools Partnership** will receive high level information about schools which need support, how the Vulnerable Schools funding has been used and its impact.

10.3.9 The following table gives an indication of the percentage of schools that have required intensive support in recent years:

Sample table to indicate SIMG Monitoring of Lambeth schools in Ofsted timetable Jan 2014 - Nov 2016* (for information)

Lambeth SIMG and Ofsted Section 5 Categories	% of Schools/AEPs by Term										
	01 '14	04 '14	07 '14	10 '14	02 '15	05 '15	10 '15	02 '16	09 '16	09 '16	11 '16
Receiving Additional Support – Category B1	9%	9%	8%	8%	12 %	17 %	17 %	15%	12 %	9%	9%
Receiving Additional Support – Category B2	7%	8%	9%	9%	7%	2%	2%	2%	2%	3%	3%
Receiving Additional Support – Category C	1%	1%	1%	1%	2%	2%	1%	0	0	0	0

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Ofsted Special Measures	1%	1%	1%	1%	1%	0	0	0	0	0	0
Ofsted Overall Effectiveness Judgment – Requires Improvement	11%	10%	9%	11%	13%	12%	9%	8%	6%	5%	4%
Ofsted Overall Effectiveness Judgment – Good	58%	59%	59%	57%	55%	55%	56%	57%	59%	61%	62%
Ofsted Overall Effectiveness Judgment – Outstanding	30%	30%	31%	31%	31%	33%	35%	35%	35%	34%	34%
Schools without a revised Ofsted (September 2012) inspection at this time	59%	55%	54%	52%	31%	27%	23%	23%	23%	22%	22%
Total Number of Lambeth Schools	87	87	87	87	87	87	87	87	87	87	87

10.3.10 The following table indicates the cycle of identification and support:

Process and Timeline for Schools monitored by SIMG (for information)

FIRST STAGE: IDENTIFICATION	SECOND STAGE: PLANNING	THIRD STAGE: IMPLEMENTATION	FOURTH STAGE: FINAL REVIEW (12 months after First Stage)	FIFTH STAGE: SECOND ROUND (after 12 months on SIMG)	SIXTH STAGE: ADVICE ON CAPABILITY
School, LA or partner identifies concern and refers to SIMG via SIA	Costed Support Plan identifies timetable and targets set for implementation and expected outcomes.	Monitoring arrangements provide impact feedback to Action Group and SIMG.	Formal letter confirming removal from SIMG category sent to Headteacher and Chair.	Targets and outcomes within the Support Plan must now include those relating specifically to the Headteacher's leadership and management.	Advice provided under LA capability procedures to Governing Body.

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<p>Discussion with SIA, Headteacher, and Chair of Governing Body regarding relevant SIMG category and school's needs.</p> <p>Assigned SIA recommends school to SIMG for inclusion in a category.</p> <p>SIMG identifies and confirms school needs to be placed in a Category</p>	<p>Programme of support and monitoring developed and negotiated with Headteacher, Governing Body and formalised in Action Plan.</p> <p>Action Group – set up to facilitate Support Plan.</p>	<p>LA provides or brokers via LSP agreed extra support and school implements improvement strategies.</p> <p>Action Group meeting termly to include a member of the Governing Body</p> <p>Impact monitored by school, assigned SIA and SIMG as appropriate.</p> <p>Necessary amendments to Action Plan discussed and agreed with Headteacher and Chair of Governing Body.</p>	<p>Towards end of agreed timescale, monitoring reports, school's own self-review and self-evaluation, LA and school data indicate that school is no longer in need of SIMG support.</p> <p>OR decision made to move school into another SIMG category.</p> <p>Formal letter sent to Headteacher and Chair of Governing Body.</p>	<p>SIMG confirms school should remain in category or move to another category.</p> <p>For Special Measures move directly to Sixth Stage.</p>	<p>SIMG confirms further action is required.</p>
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10.3.11 The first update on spend of the Vulnerable Schools Fund will come to Schools Forum in the Autumn of 2017 with an evaluation in the Spring of 2018 so that a decision can be made about any further funding for 2018/19.

Action: to ratify the proposal for de-delegation

12. AOB

13. Future Meeting Dates

Lambeth Schools Forum meeting papers: 27September 2017

Appendix: De-Delegation Vulnerable Schools Fund

School Name	De-Delegation	School Name	De-Delegation
Ashmole Primary School	-£1,921	Christ Church Primary SW9	-£1,892
Clapham Manor	-£4,074	Christ Church Streatham CE	-£1,930
Granton Primary School	-£5,248	Macaulay CE Primary School	-£1,950
Heathbrook Primary School	-£3,104	St Andrews Church of England	-£1,959
HENRY CAVENDISH PRIMARY	-£7,896	St John the Divine Church of England	-£1,707
JESSOP PRIMARY SCHOOL	-£3,696	St John's Angell Town Primary	-£1,872
Kingswood Primary School	-£7,896	St Judes CE Primary School	-£1,950
Larkhall Primary School	-£3,405	St Leonard's Church of England	-£2,377
Paxton Primary School	-£3,162	St Lukes Primary School	-£1,901
Richard Atkins Primary School	-£3,250	St Marks CE Primary School	-£1,833
SUDBOURNE PRIMARY SCHOOL	-£3,036	St Saviours Church of England	-£1,833
Sunnyhill Primary School	-£5,267	St Stephens Church of England	-£1,921
Telferscot Primary School	-£3,841	Holy Trinity Church of England	-£3,531
Vauxhall Primary School	-£1,959	ST. HELEN'S CATHOLIC	-£2,580
Walnut Tree Walk School	-£2,386	Orchard Primary School	-£1,833
Woodmansterne Primary School	-£6,295	IQRA VA Primary School	-£2,027
Wyvil School	-£3,725	St. Bernadette Catholic Junior	-£2,357
Crown Lane Primary School	-£3,773	St Anne's RC Primary School	-£3,812
Fenstanton Primary School	-£5,393	St Bede's Catholic	-£1,727
Elm Wood School	-£3,589	St Andrews Catholic Primary	-£4,346
ALLEN EDWARDS PRIMARY	-£3,657	Immanuel and St Andrew C of E	-£3,948
Glenbrook PRIMARY SCHOOL	-£2,871	Reay Primary School	-£2,018
HERBERT MORRISON	-£1,736	St Mary's	-£3,046
Streatham Wells	-£2,008	Julian's Primary School	-£7,653
BONNEVILLE SCHOOL	-£3,473	NORWOOD SCHOOL	-£7,391
Hill Mead Primary School	-£3,890	LILIAN BAYLIS TECHNOLOGY	-£6,101
ROSENDALE PRIMARY SCHOOL	-£6,004	Saint Gabriel's College	-£4,530
Hitherfield Primary School	-£5,917	The Elmgreen School	-£8,546
Henry Fawcett	-£3,220	La Retraite RC Girls' School	-£7,294
Stockwell Primary	-£5,335	Bishop Thomas Grant	-£8,740
Kings Avenue Primary School	-£3,696	ARCHBISHOP TENISON'S	-£4,026
Loughborough Primary School	-£4,026	The London Nautical School	-£5,238
Jubilee Primary School	-£3,521		
ARCHBISHOP SUMNER	-£3,143		
			-£249,280

Lambeth Schools Growth

Appendix: Growth Fund
Lambeth Schools Finance
E-mail: SchFinance@lambeth.gov.uk

2017-18

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.

Lambeth Schools Falling Rolls Criteria

Lambeth Schools Finance
E-mail: SchFinance@lambeth.gov.uk

2017-18
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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 Forum 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.
 - 2.1.5 There must be intent for the school to regain its planned admissions numbers (PAN) within 3 years

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 2018/19 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.
- 5.5 If the £585,000 is exceeded the AWPU rate will be adjusted to ensure it is distributed evenly but does not exceed the budget.

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