

Schools Forum

Minutes of the meeting held on Monday, 17 June 2019

Present:

Secondary Sector Headteachers: - Gillian Houghton

Secondary Sector Governors: - vacancy

Primary Sector Headteachers: Mike Cooke, Patricia Adams,

Primary Sector Governors: Nichola Davidge, Michael Flanagan

Special School Headteachers: Alan Braven

Special School Governor: - Walid Omara,

Academy Representatives:, Ian Fenn

Pupil Referral Unit Representative: -

Nursery School Representative: - Joanne Fenton

Non-school members:, Isobel Booler,

Council Officers: Amanda Corcoran (Director of Education), Reena Kohli, (Directorate Financial Lead - Children and Families), Anne Summerfield (Principal Finance Officer – Schools)

Apologies: Elizabeth Fritchley, Emma Merva, Michael Carson, Edward Vitalis, Cath Baggaley, Helen McAndrew

SF/20/13. Minutes

Hatim Kapacee said that he had been incorrectly recorded as absent from the last meeting.

Decision

To agree the minutes of the meeting held on 13 May 2019 as a correct record subject to the amendment above.

SF/20/14. Excessive School Balances Mechanism - Revised Proposal

The Forum considered a report of the Directorate Finance Lead – Children and Schools which set out proposed revisions to proposals that were set out within the Scheme for Financing Schools' excessive school balances clawback mechanism. The Forum had considered the mechanism at its last meeting and in its consideration of whether to clawback balances above the allowable threshold held for a period of more than two years had recommended that officers undertake further to explore the extent to which a more flexible, fair and consistent procedure in light of comments made at that meeting.

The Directorate Finance Lead – Children and Schools explained that the following matters had been considered

- i) exclusion of additional devolved formula capital and supplementary free school meals grant paid to schools in March 2019 from the excess balance calculation.

- ii) extending the number of years the excess balance can be held for before clawback is considered and actioned.
- iii) removal of maintained nursery schools (MNS) from the clawback mechanism.
- iv) increasing of the allowable balance threshold, currently 8% for special schools.

The Director Finance Lead - Children and Schools explained that the above options had all been considered. With regard to the matter concerning the exclusion of late grants from the calculation, she said that this would be excluded from this year's calculation only due to the timescales that those grants were released that year.

She also explained that it was not proposed that maintained nursery schools (MNS) be excluded from the mechanism, nor would the allowable threshold for special schools be increased. Given the increased focus on high needs funding pressures and MNS longer term funding sustainability, the Local Authority (LA) was of the view that the risk of increasing balances in these sectors will not support the City's case for sufficient funding for additional need

However, at the revised the proposal contained an amendment such that the number of years an excess balance may be held had been extended to four years. It was asserted that that that would give schools more than sufficient time to plan and appropriately spend balances above the allowable threshold.

In addition, the formation of an appeals panel was proposed as a sub-group to Schools Forum. The terms of reference for the sub-group would be to review any appeals against potential clawback of balances. It was not expected that this group would meet more than twice each year. The group would consider written evidence from schools subject to clawback. The panel would be made up of three members of Schools Forum and would be supported by an LA officer. In specific situations (i.e. discussion around own school), it will become necessary for a substitute head teacher or governor to take the place of a colleague on the sub-group

Consequently, maintained school members of the Forum were invited to approve:

- that 50% of an excess balance held for more than four years may be clawed back.
- to agree the formation of an appeal panel that considered written evidence from individual school's subject to clawback.

All Schools Forum members were invited to:

- comment on the plan to review the implementation of the mechanism before March 2020.

The Forum explored the proposals and noted that the recouped money would be used to mitigate to High Needs Block overspend. There was a discussion about the arrangements for the proposed appeals panels. A member suggested an option for a face to face meeting should be included. The Forum agreed to this noting that the implementation would be reviewed before March 2020.

Decisions

1. To agree that the proposed change to the excess balance mechanism to claw back 50% of all excessive surplus balances held for four years or more.
2. To agree the formation of an appeal panel that considered written evidence from individual school's subject to clawback with the option of a face to face meeting, if requested.
3. To note the plan to review the implementation of the mechanism before March 2020.

SF/20/15. Free School Meals Eligibility

The Forum considered a report of the Directorate Finance Lead – Children and Schools which discussed a range of proactive measures that had been undertaken in order to maximise Free School Meal (FSM) funding to schools. It was explained that last year, Manchester had changed the way FSM eligibility was captured for funding purposes after undertaking a data exercise that assessed FSM eligibility which appeared to have been under-reported in the past. The report described the impact on the numbers of children eligible for FSM since the implementation of new method of capturing FSM eligibility last year.

The Forum was invited to note that since the introduction of the on-line FSM checker, the identification of eligible FSM has increased by 2.5% in Manchester, whereas nationally there has been a reduction of 1.3%. It was therefore concluded that had Manchester not initiated the roll out of the on-line checker the identification of eligible FSM would not have increased in the manner it had.

There was a discussion about the costs to schools of purchasing the software. The Forum noted that School Forum approval would again be sought to de-delegate the cost of the online checker at a future meeting of the Forum.

Decision

To note that the Local Authority will seek approval from the School Forum to de-delegate the cost of the on-line checker at a future meeting.

SF/20/16. Update from the National Funding Conference

The Forum considered a report of the Director of Education and Directorate Finance Lead - Children's and Schools which provided an update on the National Fair Funding conference which took place in May 2019 with a focus on the future outlook for educational funding and how local authorities could be affected.

The Directorate Finance Lead – Children and Schools introduced the report which set out themes relating to:

- Recognition of a High Needs Block tipping point

- Effective Local systems of alternative provision
- Dedicated Schools Grant recovery Plan
- Early Years Funding
- Schools Forum
- Analysis of High Needs issues
- Affordable Schools

There was a discussion about the Department for Education's call for evidence of High needs pressures. The Directorate Finance Lead – Children and Schools told the Forum that Local Authorities, individual schools were being consulted on this and being asked they can do to make the new system work including the management of EHCPs and post 16 pressures.

Decision

To note the update.

SF/20/17. Section 251 Benchmarking

The Forum considered a report of the Directorate Finance Lead – Children and Schools which outlined the Department for Education (DfE) budget data collection return and a summary of the current benchmarking information produced by the DfE from returns submitted by each Local Authority.

The Forum discussed the report which concluded that in 2018/19, Manchester appeared to be an outlier when compared to both statistical neighbours and NW authorities. It was explained that this was due to more money being delegated per capita to schools through the Individual Schools Budgets, and less being centrally retained when compared to neighbouring and statistical neighbours.

There was a discussion about whether to in future include statistical information comparing outcomes with cost per capita to establish Manchester delivered better outcomes in view of the increased cost per capita compared with statistical neighbours. The Director of Education agreed to explore the extent to which this could be achieved.

Decision

To note the report.

SF/20/18. Forward Plan

The Forum considered a report of the Directorate Finance Lead – Children and Schools which presented future items for consideration for the forthcoming academic year (as set out below.)

Meeting	Reports
23rd September 2019	<ul style="list-style-type: none"> • National Funding Formula updates • Central Schools Block

	<ul style="list-style-type: none"> • Dedicated Schools Grant monitoring Q1 & Q2
18th November 2019	<ul style="list-style-type: none"> • Early Years Funding 2019/20 update • National Funding Formula updates • Benchmarking Schools Block
16th December 2019	<ul style="list-style-type: none"> • DSG Report 2020/21
20th January 2020	<ul style="list-style-type: none"> • DSG settlement and budget for forthcoming year
16th March 2020	<ul style="list-style-type: none"> • DSG budget monitoring
11th May 2020	<ul style="list-style-type: none"> • Outturn report – School Balances and centrally retained DSG • DSG update – adjustment to grant allocations • High Needs Block
15th June 2020	<ul style="list-style-type: none"> • Annual Review of Scheme for Financing Schools and School Financial regulations • Review of Analysis of Reserves • Early Years Block review
13 th July 2020	<ul style="list-style-type: none"> • National Funding Formula updates

Decision

To note the report.