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## SCHOOLS FORUM

Meeting to be held from **17:30** on **Wednesday 4 March 2020**

Venue: **Chace Community School, Churchbury Lane, Enfield EN1**

(NOTE: Sangeeta Brown, Resources Development Manager - 07956 539613)

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### Schools Members:

Governors: Mr J Ellis (Primary), Mr T Hellings (Primary), Ms H Kacouris (Primary),  
Mrs J Leach (Special), Mr J Donnelly (Secondary),

Headteachers: Mr D Bruton (Secondary), Ms K Baptiste (Primary), Ms R  
Datta (Special), Ms C Fay (Pupil Referral Unit), Ms N Husband  
(Primary), Ms M O'Keefe / Ms T Day (Secondary), Mr D Smart  
(Primary)

Academies: Ms H Thomas (Chair), Ms A Cattermole, Mrs A Goldwater, Ms A  
Nicou, Mrs L Sless, Ms Z Thompson

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### Non-Schools Members:

16 - 19 Partnership	Mr K Hintz
Early Years Provider	Ms A Palmer
Teachers' Committee	Mr J Jacobs
Education Professional	Mr A Johnson
Head of Admissions	Ms J Fear
Overview and Scrutiny Committee	Cllr S Erbil

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### Observers:

Cabinet Member	Cllr R Jewel
School Business Manager	Ms S Mahesh / Ms
E Campbell	
Education Funding Agency	Ms Goodacre

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**MEMBERS ARE INVITED TO ARRIVE AT 17:15**  
**WHEN SANDWICHES WILL BE PROVIDED**  
**ENABLING A PROMPT START AT 17:30**

# **AGENDA**

## **1. APOLOGIES FOR ABSENCE AND MEMBERSHIP**

Note:

- a) Apologies
- b) Membership: The Forum is advised that Ms Zoe Thompson, Principle Oasis Hadley had been nominated for the academy vacancy.

## **2. DECLARATION OF INTEREST**

Members are invited to identify any personal or prejudicial interests relevant to items on the agenda. A definition of personal and prejudicial interests has been attached for members' information.

## **3. MINUTES AND MATTERS ARISING FROM THE MINUTES (Pages 1 - 4)**

- (a) School Forum meetings held on 15 January 2020 (*attached*)
- (b) Matters arising from these minutes.

## **4. ITEMS FOR DISCUSSION / DECISION (Pages 5 - 12)**

- (a) Schools Budget – 2019/20 Monitoring Update (*attached*)
- (b) High Needs Places – 2020/21 (to follow)
- (c) Schools Budget – 2020/21: Update (*attached*)

## **5. ITEMS FOR INFORMATION (Pages 13 - 18)**

None

## **6. WORKPLAN (Pages 19 - 20)**

## **7. ANY OTHER BUSINESS**

## **8. FUTURE MEETINGS**

- (a) Date of next meeting is Wednesday 6 May 2020 at 5.30pm at Chace Community;
- (b) Dates of future meetings:
  - 15 July 2020 – venue tbc

## **9. CONFIDENTIALITY**

To consider which items should be treated as confidential.

## Schools Forum Membership List

Name		Sector	Organisation	Member / Sub Since	End of Term
Ms H Kacouris	G	P	St Andrew's Southgate	Autumn 2017	Autumn 2021
Mr J Ellis	G	P	George Spicer	Autumn 2019	Summer 2023
Mr T Hellings	G	P	Tottenham Infant	Spring 2020	Summer 2024
Mrs J Leach	G	Sp	Waverley	Autumn 2015	Summer 2019
Mr J Donnelly	G	S	St Ignatius	Spring 2019	Summer 2023
Ms C Fay	H	PRU	Orchardside	Required	
Mr D Smart	G	P	De Bohun	Autumn 2019	Summer 2023
Ms N Husband	G	P	Firs Farm	Autumn 2019	Summer 2023
Ms K Baptiste	H	P	St Monica's	Autumn 2017	Summer 2021
Mr D Bruton	H	S	Chace Community	Summer 2016	Spring 2020
Ms R Datta	H	Sp	West Lea	Spring 2019	Winter 2023
Ms T Day / Ms M O'Keefe	H	S	Bishop Stopford's St Ignatius	Autumn 2017	Summer 2021
Ms H Thomas	H	A	Alma - Attigo	Autumn 2018	Summer 2022
Mrs A Goldwater	H	A	Fleecefield – Children First	Spring 2019	Spring 2023
Ms A Cattermole	CFO	A	Cuckoo Hall Academy Trust	Summer 2020	Spring 2024
Ms A Nicou	H	A	Enfield Learning Trust	Autumn 2019	Summer 2023
<b>Vacancy</b>	H	A			
Mrs L Sless	G	A	Galliard – Children First	Autumn 2015	Spring 2023
Ms A Palmer		EY	Right Start Montessori	Autumn 2017	Summer 2021
Mr K Hintz		P16	CONEL	Autumn 2015	Summer 2019
Mr J Jacobs		All	National Education Union	Summer 2017	Spring 2021
Ms J Fear		All	Local Authority	By Appointment	
Ms A Johnson		All	Local Authority	By Appointment	
CLlr S Erbil		All	Chair of Overview & Scrutiny	By Appointment	
CLlr Jewels	O	All	Cabinet Member	By Appointment	
Ms S Mahesh	O	All	School Business Manager	Nominated	
Ms K Goodacre	O	All	EFSA	By Appointment	

### Key

G – Governor  
H – Headteacher  
O - Observer  
P – Primary  
S – Secondary  
Sp – Special  
Ac – Academy  
EY – Early Years  
P16 – Post 16

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**MINUTES OF THE SCHOOLS FORUM MEETING**  
**Held on Wednesday 15 January 2020 at Chace Community School**

- Governors:** Mr J Ellis (Primary), Ms H Kacouris (Primary), Mrs J Leach (Special), Mr J Donnelly (Secondary), Mr T Hellings (Primary).
- Headteachers:** Mr D Bruton (Secondary), Ms K Baptiste (Primary), Ms R Datta\* (Special), Ms C Fay\* (Pupil Referral Unit), Ms N Husband (Primary), Ms M O'Keefe / Ms T Day (Secondary), Mr D Smart\* (Primary)
- Academies:** Vacancy, Ms H Thomas (Chair), Mrs A Goldwater, Ms A Nicou, Mrs L Sless, Mrs A Cattermole\*

**Non-Schools Members:**

16 - 19 Partnership Mr K Hintz\*  
 Early Years Provider Ms A Palmer  
 Teachers' Committee Mr J Jacobs  
 Education Professional Mr C Seery  
 Head of Admissions Ms J Fear  
 Overview and Scrutiny Committee Cllr S Erbil\*

**Observers:**

Cabinet Member Cllr R Jewel\*  
 School Business Manager Ms S Mahesh  
 Education Funding Agency Ms Goodacre  
 Director of Education Mr P Nathan  
 Head of Finance Challenge Mr N Goddard  
 Finance Manager Mrs L McNamara  
 Resources Development Manager Mrs S Brown  
 Graduate Trainee: Ms L Nasby  
 Clerk: Alice McLellan

*\* italics denotes absence*

**1. APOLOGIES FOR ABSENCE AND MEMBERSHIP**

- (i) Apologies for absence were received from Ms Datta, Ms Fay, Mr Smart, Mrs Cattermole, Mr Hintz, Cllr Erbil and Cllr Jewel.
- (ii) **Membership**  
**NOTED** that:
- (a) Mr Lamb had resigned from the Schools Forum. The Forum suggested there should be full representation and it would be better if the vacancy was filled by a Secondary Academy Headteacher.
- (b) Mr Hellings was welcomed as a new Primary Governor.
- (c) The Forum was informed that this was Ms Seery last meeting of the Schools Forum. Ms Seery was thanked for all her work and support to the Schools Forum.

**2. DECLARATION OF INTEREST**

An opportunity was provided for Members to declare an interest whether pecuniary or otherwise regarding any of the items on the agenda. No declarations were made.

**3. MINUTES AND MATTERS ARISING FROM THE MINUTES**

**RECEIVED** and agreed the Minutes of the Meeting held on 11 December 2019.

4. ITEMS FOR DISCUSSION/DECISION

(i) Schools Budget – 2019/2020 Monitoring Update

**RECEIVED** a report providing details of the DSG budget monitoring position for 2019/20.

**REPORTED** that there no changes to the DSG allocation. Since the last update, there was a variance due to an in increase in outborough placements. The current overspend was projected at £4.09m.

The Forum noted and received the update on the budget position.

(ii) Schools Budget Update 2020/21: Update

**RECEIVED** a report on the proposed budget position for 2020/21 and the schools' funding formula.

**NOTED:**

(a) Dedicated Schools Grant (DSG) Settlement 2020/21

From the indicative information provided at the last meeting, the Forum was advised that the Schools Block funding had decreased by £1.48m. The actual 2020/21 DSG allocation was slightly less than indicative figures due to a drop in pupil numbers. The decrease in pupil numbers was also reflected by a reduction of £0.01m for CSSB.

At the same time, there had been an increase in the pupils eligible for free school meals.

(b) Draft Budget and Formula Factors 2020/21

Following the agreement of the Forum to the LAC and 0.5% transfer of funding from the Schools Block to the High Needs Block, disapplication requests had been submitted to the DFE and was approval awaited.

(c) Proposed Formula Factors and Unit Rates 2020/21

The Forum was informed since the papers for the meeting were circulated, the data had been further assessed and it was found, due to the decrease in pupil numbers at PFI schools, there was a shortfall in funding for the PFI contribution. It was proposed that the PFI shortfall be met by amending the Ever 6 unit rates rather than reviewing all the unit rates.

It was commented that it was intolerable that money was being taken from schools to fund empty schools and that it was important to ensure all PFI schools in the borough were full. In response to a question, it was confirmed that additional funding required to meet the shortfall was in the region of £200k.

The Forum was advised that the minimum funding guarantee would remain at 1.84%.

(d) it was confirmed the pension contribution for support staff would decrease by 4.5% following an actuarial review.

(e) It was confirmed when the DFE had validated the unit rates and allocations, the indicative budgets would be circulated to schools. This was likely to be at the end of January and final budgets from all three blocks would be circulated at the end of February / early March 2020.

**RESOLVED** to agree the 2020/21 unit rates as included in the papers for the meeting and the amended rates for the Ever6 FSM factor of £553.25 (Primary) and £805.18 (Secondary).

The Forum noted and received the 2020/21 DSG settlement and subsequent draft budget.

(iii) Scheme for Financing (2020/21)

**RECEIVED** a report detailing the changes required to the local Scheme for Financing for maintained schools.

**REPORTED** following the consultation, the paper detailed the changes required to the Scheme to reflect the reduction in the threshold for retaining surplus balances of 8% for primary and special schools. The other changes required to the Scheme included the revisions to the EU thresholds for tendering.

**NOTED** that the DfE may seek some prescribed changes following the consultation on financial transparency. The Forum would be advised of any prescribed changes.

**RESOLVED** that maintain schools members agree to the proposed changes to the Scheme for Financing 2020/21.

(iv) High Needs Strategy: Update

**RECEIVED** a report summarising the provision available and developments to increase places to support pupils with high level of Special Education Needs & Disability (SEND) and Education Health and Care Plans (EHCPs).

**REPORTED** that;

(a) Analysis

(i) National Overview

Data from the Office of National Statistics release (ONS SR) showed an increase of pupils with an ECHP from 2.8% to 3.1% of the total pupil population. Enfield was close to the national average increase of ECHPs. There had been a reduction in the total number of pupils in Enfield by -0.2%. There were variances in figures within the ONSR report that were explained by using calendar, financial and academic years.

(ii) Local Overview

In Enfield, the main areas of need were ASD, SLCN and SEMH and the demand for support was continuing to increase resulting in the overspend of over £4m highlighted in the Budget Monitoring report.

(iii) Forecast

The Forum was advised if all things remained equal then, based on national and local trends, it was expected that there would be an increase of 300-400 pupils with EHCPs during 2020/2021.

(b) Financial Update

An additional £7m was received for 2020/21.

It was commented that placements in schools were not funded adequately. In response to a **QUESTION**, it was stated that as part of the budget planning, all resources including the additional funding would be used to manage the overspend and the costs associated with pupils with EHCPs currently and expected to be supported. The next stage, during the coming year, would be to review funding arrangements for pupils with EHCPs in special and mainstream schools. It was requested that the review should include Headteacher representatives.

(c) Specialist Provision Update

The strategy to manage increasing demand was to increase the provision of in-borough specialist units and special school places.

**NOTED** that members were made aware of amendments made to section 5.1.

Members thought it would be useful to identify whether there were gaps between the age of children when referred for EHCPs and the age of children when EHCPs were

received. Currently speech and language assistance could not be accessed without an EHCP, this incurred the extra cost of the EHCP. It was stated that speech and language was a priority across the Local Authority and there was an aim to provide training and support to staff to help lower level needs. The Forum was pleased the expansion of Durants School had enabled some outborough children to move back into Enfield. The aim for the Authority was to continue to keep children in-borough and to reduce use of outborough independent provision.

In response to a **QUESTION**, an Early Years review was being completed and a review of speech and language had been carried out. A member highlighted the pressure that 2-year checks put on speech and language often led to incorrectly identifying issues with speech and language. It was suggested that the checks would be better if they were carried out in an environment known to the child. Members discussed the issue of the health sector not engaging with the education sector.

(d) Nurture Groups

Following feedback from the Forum, the Authority was reviewing the criteria for Nurture Groups and had advised schools that there might be a change to funding. If the Forum was agreeable, schools would be informed week beginning 20 January. Officers were working on options that will be initially discussed with Education Resources Group.

The Authority was aware that educational outcomes of children in Nurture Groups was good but the need for this type of provision was increasing. The Forum was advised that there were approximately 15 schools with a Nurture Group.

It was noted that some schools had given up their Nurture Groups when they were not required.

It was confirmed that that the Forum would be kept up to date on the review. When criteria had been agreed letters would be sent to all schools.

(e) Post 16 Provision

There had been an increase in the number of students supported by internships. A member suggested it would be useful to find out how many of these students were still employed following their internships.

In response to a **QUESTION** regarding evaluating placements, it was stated that this year the main focus had been on the quality of provision. This was a challenge when children were settled in a provision, which was not of a high enough quality. In addition, work was continuing to reduce costs and reviewing attendance; where attendance was low, then the funding was being adjusted accordingly.

**5. WORKPLAN**

**RESOLVED** to update the Workplan with items arising from this meeting.

**ACTION: MRS BROWN**

**6. FUTURE MEETINGS**

**NOTED:**

(a) The next meeting as Wednesday 4 March 2020, 5:30pm, Chace Community.

(b) The dates of future meetings:

- 6 May 2020 – venue tbc
- 15 July 2020 – venue tbc

**7. ITEMS TO REMAIN CONFIDENTIAL**

**NOTED** there were no items to remain confidential.



**MUNICIPAL YEAR 2019/20 REPORT NO. 25****MEETING TITLE AND DATE:**

Schools Forum 04 March 2020

Agenda – Part 1

Item: 4a

**REPORT OF:**

Director of Finance, Resources &amp; Customer Services

**Subject: Schools Budget -  
2019/20 Monitoring Update****Contact officer and telephone number:**

Louise McNamara 020 8379 4720

E mail: [louise.mcnamara@enfield.gov.uk](mailto:louise.mcnamara@enfield.gov.uk)**1. EXECUTIVE SUMMARY**

This report provides details of the DSG budget monitoring position for 2019/20 including confirmation of the latest DSG allocation from the EFA as at January 2020.

**2. RECOMMENDATIONS**

To note the contents of the report.

**3. ACCUMULATED DSG CARRIED FORWARD**

3.1 Table 1 sets out the cumulative DSG deficit position as at 31 March 2019.

The DSG Outturn position for 2018/19, as at 31<sup>st</sup> March 2019, was reported at the last meeting. At this stage it was highlighted that an adjustment would be made in 2019/20, in respect of 2018/19, to adjust the DSG allocation for the Early Years Block to reflect January 2019 pupil data. It was estimated that this adjustment would be minimal as overall early years pupil numbers had remained consistent between Jan 2018 and Jan 2019. The Early Years adjustment was confirmed by the ESFA in July 2019 as £12,700.

**Table 1 – Accumulated DSG Carry Forward 2018/19**

	£'000s
<b>Balance brought forward 1 April 2018</b>	<b>(0.738)</b>
2017/18 DSG Allocation (applied July 2018)	(0.743)
<b>Net Balance b/f 1 April 2018</b>	<b>(1.481)</b>
Net Underspend 2018/19	<b>2.575</b>
<b>Surplus Balance 31 March 2019</b>	<b>1.094</b>
Outstanding Adjustments 2018/19	(0.682)
<b>2018/19 Carry Forward – 31/03/2019</b>	<b>0.412</b>
2018/19 Early Years Adj – July 2019	0.012
<b>2018/19 Carry Forward – FINAL</b>	<b>0.424</b>

#### 4. 2019/20 DSG ALLOCATION

- 4.1 The original estimate of gross DSG resources for 2019/20 amounted to £334.186m. Of this amount £1.945m will be provided direct by the Education and Skills Funding Agency (ESFA) to fund post 16 places in special schools and places in mainstream academy units and academy special schools. Budget allocations for 2019/20 were agreed within this level of resources.
- 4.2 In January 2020, revised DSG allocations for 2019/20 were published. These allocations reflected updated academy and college recoupment for the Schools Block and High Needs. The revised DSG position for 2019/20 is summarised in Table 2.

**Table 2 – DSG Allocation 2019/20**

DSG Summary 2019/20	ORIG 2019/20	Academy Recoup	Import/Export Adj 19/20	Early Years Adj 19/20	REVISED 2019/20
	£000	£000	£000	£000	£000
SCHOOLS BLOCK	259.009	(130.954)			<b>128.054</b>
CENTRAL SERVICES	2.925				<b>2.925</b>
EARLY YEARS BLOCK	25.410			0.022	<b>25.431</b>
HIGH NEEDS BLOCK	46.843		0.435		<b>47.278</b>
<b>GROSS DSG</b>	<b>334.186</b>	<b>(130.954)</b>	<b>0.435</b>	<b>0.022</b>	<b>203.689</b>
Direct ESFA Funding	(1.945)	(0.131)			<b>(2.076)</b>
<b>NET TOTAL DSG</b>	<b>332.241</b>	<b>(131.085)</b>	<b>0.435</b>	<b>0.022</b>	<b>201.613</b>

- 4.3 Further updates to the 2019/20 DSG allocation are not expected before the end of the financial year, but a final confirmation will be received in March 2020.

#### 5. 2019/20 DSG Budget Monitor

Appendix D details the DSG budget monitoring position as at the end of January 2020.

##### 5.1 Schools Block

###### Projected Underspend – (£538k)

There are projected underspends in the Schools Block. These relate to the Growth Fund, where no additional classes are expected to be required for the 1920 academic year, the Appeals budget which is projecting an underspend and rates where there is reduced demand on the DSG for schools converting to academy status as they will be entitled to 80% charitable relief.

##### 5.2 Early Years Block

###### Projected Net Nil Variance

Monitoring indicates that there is an overspend in school nurseries, but this is offset by a corresponding underspend in PVIs resulting in a net nil variance. The position will be closely monitored for the remainder of the financial year.

### 5.3 High Needs

#### **Projected Overspend - £5.874m**

The High Needs budgets for 2019/20 were set within the funding available which did not allow for any contingency or provision for expected increase in demand. Key areas of overspend are as follows:

- Outborough Placements - £2.918m  
Budgets for out-borough placements were based on commitments as at January 2019. The projected overspend is due to a variety of factors including the full year effect of pupils starting during 2018/19, new placements and changes to support packages. Several residential students have turned 19 during the financial year so the Education budget has had to pick up the full cost of these placements rather than a 3-way split with health and children's services.

Further analysis of these budgets is being undertaken to ensure that projections are as accurate as possible.

- Post 16 High Needs - £0.467m  
Overspend based on current projections of student numbers
- Exceptional Needs – £0.797m  
Exceptional needs overspend based on the summer and autumn term monitoring exercise. The spring term data is currently being analysed and further significant increases in expenditure are expected.
- SEN & Educational Psychology Service Salaries - £0.466m  
Staffing has been increased in both these service areas in order to meet the increase in demand for EHCPs and statutory assessments. A further re-structure of the SEN Service is currently being finalised in order to make the service fit for purpose. This is expected to result in an increased overspend
- Speech and Language Service - £0.173k  
Overspend due to increased charge from the Health Service. This overspend relates to 2018/19 and an invoice for this additional cost is also expected for 2019/20

Plans for additional in borough provision is being developed and an update will be provided as soon as the details and start dates have been confirmed.

### 5.4 DSG Outturn Position

Overall, the latest monitoring position for 2019/20 indicates an overspend of £5.336m which will result in a DSG cumulative deficit of £4.924m. Due to the issues highlighted above, this is expected to increase further by the end of the financial year. The 2019/20 budget will continue to be monitored closely for the remainder of the financial year and updates will be provided to the Forum at future meetings.

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<b>DSG Budget Monitor 2019/20</b>	June Monitor	July Monitor	August Monitor	Sept Monitor	Oct Monitor	Nov Monitor	Dec Monitor	Jan Monitor	Variance Dec-Nov
<b>Opening Position 2019/20</b>	£000	£000	£000	£000	£000	£000	£000	£000	£000
2018/19 Surplus	- 1,094	- 1,094	- 1,094	- 1,094	- 1,094	- 1,094	- 1,094	- 1,094	-
Outstanding 18/19	718	718	718	718	718	718	682	682	- 36
<b>Net DSG Deficit 1/4/2019</b>	<b>- 376</b>	<b>- 376</b>	<b>- 376</b>	<b>- 376</b>	<b>- 376</b>	<b>- 376</b>	<b>- 412</b>	<b>- 412</b>	<b>- 36</b>

<b>2019/20 Variance</b>	£000	£000	£000	£000	£000	£000	£000	£000	£000
<b>SCHOOLS BLOCK</b>									
Growth Fund	0	-150	-150	-300	-130	-130	-130	-130	0
Appeals	0	0	0	-150	-150	-150	-150	-150	0
Rates - reduction in rates Academy co	-258	-258	-258	-258	-258	-258	-258	-258	0
<b>Total Schools Block Variance</b>	<b>-258</b>	<b>-408</b>	<b>-408</b>	<b>-708</b>	<b>-538</b>	<b>-538</b>	<b>-538</b>	<b>-538</b>	<b>0</b>
<b>EARLY YEARS BLOCK</b>									
2 Year Olds	0	0	0	0	0	0	0	0	0
3&4 Year Olds	0	0	0	0	0	0	0	0	0
30 Hours	0	0	0	0	0	0	0	0	0
Centrally Held	0	0	0	0	0	0	0	0	0
<b>Total Early Years Block Variance</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>HIGH NEEDS BLOCK</b>									
<b>Variation in DSG Funding &amp; Resources</b>									
Additional HNB Allocation	0	0	0	0	0	0	0	0	0
Import/Export Adj	0	-435	-435	-435	-435	-435	-435	-429	6
FE Colleges - HNB Adj	0	548	548	548	548	548	548	760	212
	<b>0</b>	<b>113</b>	<b>113</b>	<b>113</b>	<b>113</b>	<b>113</b>	<b>113</b>	<b>331</b>	<b>218</b>
<b>Outborough Provision</b>									
Independent Day Placements	1007	953	1069	1379	1199	1274	1444	1557	113
Independent Residential Placements	631	707	707	684	595	674	652	741	88
Other LA Special Schools	72	131	131	171	228	266	300	273	-27
Other LA Mainstream Support	207	186	200	274	308	315	318	347	30
Peripatetic Service	0	209	209	209	209	209	209	209	0
Speech and Language	0	173	173	173	173	173	173	173	0
Post 16 High Needs	0	0	420	500	577	577	422	467	45
<b>In Borough Provision</b>									
Excep Needs - adj to orig 1920 & Sum	430	420	420	420	420	420	797	797	0
Durants - additional TA funding	144	144	144	144	144	144	144	144	0
West Lea - 55 addit places Sept19	0	0	0	600	600	600	600	600	0
ASA - recovery of 1819 underspend	-110	-110	-110	-110	-110	-110	-110	-110	0
Behaviour Support	0	34	0	0	0	0	0	0	0
Nurture Groups	0	0	0	0	0	0	0	0	0
Parenting Support	0	78	77	77	80	80	80	80	0
EPS Salaries	0	0	200	200	184	184	184	184	0
SEN Team Salaries	0	0	241	241	290	285	282	282	0
Home & Hospital	0	0	0	0	0	0	0	0	0
ARP - delay in start up of new units	0	0	0	-130	-200	-200	-200	-200	0
<b>Total High Needs Block Variance</b>	<b>2,381</b>	<b>2,926</b>	<b>3,881</b>	<b>4,832</b>	<b>4,698</b>	<b>4,891</b>	<b>5,294</b>	<b>5,543</b>	<b>249</b>
<b>ESTIMATED VARIANCE 2019/20</b>	<b>2,123</b>	<b>2,631</b>	<b>3,586</b>	<b>4,237</b>	<b>4,273</b>	<b>4,466</b>	<b>4,869</b>	<b>5,336</b>	<b>467</b>
Cumulative Deficit b/f	- 376	- 376	- 376	- 376	- 376	- 376	- 412	- 412	0
<b>ESTIMATED DSG OUTTURN 2019/20</b>	<b>1,747</b>	<b>2,255</b>	<b>3,211</b>	<b>3,861</b>	<b>3,897</b>	<b>4,090</b>	<b>4,457</b>	<b>4,924</b>	<b>467</b>

increase as per Jan DSG update

113 Latest Pupil Projections

88 Latest Pupil Projections

-27 Latest Pupil Projections

30 Latest Pupil Projections

193 367 467

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	Jan-20	FINAL
SCHOOLS BUDGET 2020/21	£	£
<b>INCOME</b>	£m	£m
Schools Block - 5-16 year olds	267.872	267.872
Central Services Schools Block	2.678	2.678
Early Years Block	25.803	25.803
High Needs Block	54.905	54.005
<b>TOTAL DSG</b>	<b>351.258</b>	<b>350.358</b>
<b>TOTAL RESOURCES</b>	<b>351.258</b>	<b>350.358</b>
<b>EXPENDITURE</b>		
<b>SCHOOLS BLOCK</b>		
Total Funding	267.872	267.872
0.5% Trf to High Needs Block	-1.339	-1.339
LAC trf to High Needs Block	-0.140	0.000
<b>Net Funding</b>	<b>266.393</b>	<b>266.533</b>
Schools Delegated Formula Funding	266.093	266.233
Growth Fund	0.300	0.300
<b>TOTAL SCHOOLS BLOCK EXPENDITURE</b>	<b>266.393</b>	<b>266.533</b>
<b>CENTRAL SERVICES SCHOOLS BLOCK (CSSB)</b>		
<b>Total Funding</b>	<b>2.678</b>	<b>2.678</b>
Statutory Functions	1.948	1.948
Historic Commitments	0.730	0.730
<b>TOTAL CSSB</b>	<b>2.678</b>	<b>2.678</b>
<b>EARLY YEARS BLOCK</b>		
<b>Total Funding</b>	<b>25.803</b>	<b>25.803</b>
3 & 4 Year Allocations - PVI & Maintained	16.559	16.559
3 & 4 Year Allocations - PVI & Maintained - 30 Hours	4.118	4.118
2 Year Old Allocations - PVI & Maintained	3.783	3.783
Early Years Central Functions	1.088	1.088
Early Years Pupil Premium	0.169	0.169
Disability Access Fund	0.087	0.087
<b>TOTAL EARLY YEARS BLOCK</b>	<b>25.803</b>	<b>25.803</b>
<b>HIGH NEEDS BLOCK</b>		
Gross High Needs Block (pre recoupment)	54.905	54.905
FE College Recoupment	-	0.900
<b>Total High Needs Funding</b>	<b>54.905</b>	<b>54.005</b>
0.5% transfer from Schools Block	1.339	1.339
LAC transfer from Schools Block	0.140	-
<b>Total Funding</b>	<b>56.384</b>	<b>55.344</b>
Delegated Funding - special schools & units, excep needs in mainstream		33.840
Placement Funding		17.387
Commissioned and Central Services		6.894
High Needs Contingency		0.000
Allocations Update to be provided at next meeting	56.384	
<b>TOTAL HIGH NEEDS BLOCK</b>	<b>56.384</b>	<b>58.121</b>
<b>TOTAL PLANNED EXPENDITURE</b>	<b>351.258</b>	<b>353.134</b>
<b>TOTAL DSG INCOME</b>	<b>351.258</b>	<b>350.358</b>
<b>NET POSITION 2020/21</b>	<b>- 0.000</b>	<b>2.776</b>

net of FE Recoupment

disapplication refused

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**MUNICIPAL YEAR 2018/19 REPORT NO. 27**

**MEETING TITLE AND DATE:**  
**Schools Forum 04 March 2020**

**REPORT OF:**  
 Director of Finance, Resources & Customer Services

Contact officer: name and email:  
 Louise McNamara  
 E-mail: [louise.mcnamara@enfield.gov.uk](mailto:louise.mcnamara@enfield.gov.uk)

	Item: 4c
<b>Subject: Schools Budget 2020/21</b>	
<b>Wards: All</b>	

**1. EXECUTIVE SUMMARY**

In December 2019 the DfE announced the initial 2020/21 Dedicated Schools Grant (DSG) and issued the October 2019 data set to be used to calculate 2020/21 Individual Budget Shares for primary and secondary schools. At the January 2020 meeting, the Schools Forum noted and agreed the formula factors and unit rates used in the Schools Block funding formula and these were submitted to the DfE by their deadline of 21st January 2020.

The draft Schools Budget 2020/21 was considered and approved by Cabinet at their meeting on 12<sup>th</sup> February 2020, as part of the Budget 2020/21 and Medium-Term Financial Plan 2020/21 to 2023/24 (General Fund) report. This report will be presented at the full Council meeting on 26th February 2020 for final approval.

This report seeks the support of Schools Forum to the recommended application of the DSG in 2020/21, based on the initial DSG allocation.

Further updates on the DSG funding and application for 2020/21 will be presented at future meetings during the financial year when there are any changes to report. Regular budget monitoring reports will also be provided.

**2. RECOMMENDATIONS**

**The Schools Forum is asked to note and support:**

- The latest proposals for allocating the DSG for 2020/21 within the Schools, Early Years and High Needs blocks.

**3. Dedicated Schools Grant 2020/21**

At the January meeting it was reported that the initial DSG allocation for 2020/21 had been announced in December 2019 and that Enfield had received an allocation of £351.26m.

An updated DSG for 2020/21 will be confirmed in July 2020 when the Early Years Block will be adjusted to reflect the January 2020 Census. At this stage we have assumed that funding will remain at 2019/20 levels and early indications of January 2020 census data suggests that numbers have remained broadly at January 2019 levels for pupils taking up the basic 15 hours entitlement and the additional 30 hours.

The latest budget monitoring for 2019/2019 indicates a projected overspend of approximately £4.9m.

## 4. Proposed Allocation of DSG Funding 2020/21

### 4.1 Summary of Budget Requirements and Funding

Draft Budget requirements and funding are summarised in **Appendix B**. The following paragraphs provide some background detail to the budget allocations.

### 4.2 Schools Block

The formula factors and unit rates were approved by Schools Forum in January 2020 and have been included in the APT Proforma submitted to the Education and Skills and Funding Agency (ESFA) by their required deadline of 21<sup>st</sup> January 2020. It should be noted, however, that following the Forum meeting on 15<sup>th</sup> January we received notification from the ESFA that although our first disapplication request to transfer 0.5% of funding from the Schools Block (SB) to the High Needs Block (HNB) had been agreed, the second request to transfer £140k from the SB to HNB had been declined. This additional £140k was therefore allocated via the formula by adjusting the FSM Ever 6 unit rate as shown in Table 1 below.

**Table 1 – FSM Ever 6 Unit Rate**

FSM Ever 6 Unit Rate	Prim	Sec
Forum Report - 15/01/2020	565.26	822.65
Verbal Update at Forum	553.25	805.18
Final Submitted APT Rates - 2020/21	561.19	816.74

Validation checks carried out by the ESFA did not result in any changes to our submission and formula allocations for 2020/21 were then circulated to all schools and academies. This information would support schools with their budget planning for next 3-year period. The full budget notifications for maintained schools will be issued in early March.

At this stage, the formula allocations for 2020/21 include estimated rates budgets but as soon as the 2020/21 rates bill information is received from the Business Rates Team schools will be informed of any change to their overall funding allocation.

### 4.3 Early Years Block

#### 4.3.1 3- and 4-Year Olds – 15 Hours Entitlement

In 2020/21, all providers of the free nursery entitlement will continue to be funded through the Early Year's National Funding Formula (EYNFF), which has been in place since April 2017. In 2020/21, as in 2019/20, 95% of the funding received must be passed to providers. The hourly DSG funding rate for 2020/21 has been increased by £0.08 and £0.07 of this will be passed to providers, increasing the provider rate from £5.11 to £5.18 per hour. Each provider will be funded based on participation.

**Appendix B** indicates that expenditure totalling £16.559m is expected to be delegated to maintained schools, academies and PVI providers in 2019/20. Funding will continue to be adjusted on a termly basis to reflect actual pupil numbers.

#### 4.3.2 3 and 4 Year Olds – 30 Hours Entitlement

From September 2017 the Government extended the free nursery entitlement from 15 to 30 hours a week for working parents with the aim of reducing childcare costs for working families thus enabling parents to return to work or work more hours.

As with the 15 hours basic entitlement, the authority is required to delegate 95% of available funding to providers and for 2020/21 the hourly rate will increase from £5.11 to £5.18. Funding for the 30 Hours Entitlement is within the £4.118m detailed in **Appendix B**.

#### 4.3.3 2 Year Olds – 15 Hours Entitlement

There are no planned changes to the funding arrangements for Terrific Twos, which provides 15 hours free provision for deprived 2-year olds. The hourly rate for this provision has also increased by £0.08 and this will be fully passported to providers, increasing the hourly rate from £5.66 to £5.74 for 2020/21. **Appendix B** details that planned that funding of £3.783m is expected to be delegated to providers in 2019/20.

#### 4.3.4 Early Years Pupil Premium

For 2020/21 the authority has received an allocation of £0.169m for the Early Years Pupil Premium (EYPP). This funding is allocated to providers at a rate of £300 per eligible pupil who are taking up the 15 hours free entitlement.

### 4.4 High Needs Block

Allocations from the High Needs Block have been grouped into 4 broad areas and any budget increases or changes in methodology are detailed in the relevant section below. It should be noted that the HNB allocations are still being finalised and should be considered as draft estimates at this stage, but the latest position indicates a potential overspend in this area of £671k. This mainly relates to an increase in in borough provision which will enable more pupils to be educated in borough and, in time, reduce expenditure on out of borough independent placements.

The draft allocations are summarised in **Appendix B**.

#### 4.4.1 Delegated Funding

The High Needs Block includes provision for delegated budgets to Special Schools, the Pupil Referral Unit, ARPs and Nurture Units and Exceptional Needs funding for pupils with Education, Health and Care Plans (EHCPs) in mainstream schools.

Table 2 below summarises the initial 2020/21 budget allocations for Delegated Funding.

**Table 2: Summary of Delegated Funding**

Delegated Funding 2020/21	Budget Allocation
	£000
Special Schools incl Outreach	19.640
ARPs & Satellite Provision	2.999
Exceptional Needs	8.046
Nurture Groups	0.866
PRUs	2.289
<b>TOTAL DELEGATED</b>	<b>33.840</b>

#### Special Schools

There is no change to the funding methodology for Special Schools but funding for agreed additional places will be included in initial budgets for 2020/21. Where additional places or

provisions are still in negotiation, funding has been included within the overall budget and individual school budgets will be adjusted in year when arrangements have been confirmed.

As in 2019/20, outreach work in special schools will continue to operate as a commissioned service and funding allocations are not automatic. A block allocation of £112k will be allocated to schools whose expenditure plan has been approved. There is total provision of £0.672m for outreach work in the 2020/21 budget.

### **ARPs (including Speech & Language Units)**

The funding methodology for ARPs remains as 2019/20. Schools with an ARP will receive the first £4k of their place funding through the funding formula. The £6k balance of place funding plus the Top Up will be allocated from the High Needs Block. For any places that were vacant on October 19 census day the full £10k place funding will be allocated from the High Needs Block.

The budget includes provision for 3 new ARPs with effect from September 2020.

### **Nurture Groups**

Nurture Groups are funded as a commissioned service. Schools with Nurture Groups are allocated a block allocation of £59,700 for 2020/21.

### **SEN Exceptional Needs**

The funding arrangements for exceptional needs will continue on the same basis for 2020/21. The local arrangements are summarised as follows:

- All schools receive £12k within their lump sum allocation as a contribution to the £6k for 2 SEND pupils
- Schools fund the £6ks for the average number of SEND pupils based on the expected Enfield position of 1 in every 50 pupils being classed as high needs (reduced from 1 in 60 to reflect latest position)
- Where schools have more than the average number of SEND pupils additional £6ks will be provided by the authority
- The position regarding the £6k funding is fixed at the start of the financial year based on the spring term SEN data
- The authority will provide Top Up funding for all pupils and this will be adjusted on a termly basis to reflect new Education, Health and Care Plans and pupil movement

There has been a significant increase in the number of mainstream pupils with an EHCP and an additional £1.7m has been built into this budget for 2020/21 to reflect the associated increase in costs.

### **Pupil Referral Unit (PRU)**

Funding for 2020/21 has been based on 100 places. As in 2019/20, the budget includes an additional £100k which will provide, up front, the funding usually received from excluded pupil transfers during the year. This will give the PRU more certainty in terms of budget planning.

#### **4.4.2 Placement Funding**

The High Needs Block funds placements for SEN pupils in out of borough schools and FE Colleges and those being supported by the Home and Hospital Service.

Table 3 below summarises the budget allocations for Placement Funding.

**Table 3: Placement Funding**

<b>Budget Area 2020/21</b>	<b>Budget Allocation</b>
	£000
Post 16 SEN Support	2.350
Home & Hospital	0.309
Other LA - Special Schools	2.622
Other LA – Mainstream Tuition	1.230
Independent Residential	2.603
Independent Day	8.273
<b>TOTAL PLACEMENT</b>	<b>17.387</b>

**Post 16 SEN**

Local Authorities are responsible for funding Post 16 high needs pupils in FE establishments from the High Needs element of the DSG. The estimated full year cost of funding this provision in 2020/21 is £2.350m, the same as 2019/20. There has been increased demand in this area due to the increase in offer to 25 years old and the development of bespoke provision to cater for the complex needs to some young people. The authority continues to work with students and providers to ensure that the offer of provision for post 16 pupils is consistent and aims keep costs within budget. This work will be further developed in 2020/21 and is hoped to lead to cost reductions.

**Home and Hospital Provision**

The Home and Hospital Tuition Service is managed by West Lea School and provides tuition for pupils in hospital and those who cannot access school due to illness. Revised strategies introduced by the school have enabled the service to operate within budget provision but demand for the service is increasing and it is becoming more challenging to operate within existing budget provision. The budget allocation for this provision for 2020/21 will remain at £309k but the position will continue to be monitored.

**Outborough Placements**

As reported over the last 2 financial years, the Authority has experienced significant pressures in relation to the provision of high needs places which have resulted from an increased number of SEN pupils and an increase in the complexity of their needs. There has been an increase in the placement of pupils in other local authority schools and independent day and residential schools due to in borough provision being at full capacity and in some cases, it does not meet individual pupil needs.

As detailed in the High Needs report presented at this meeting, various strategies and initiatives have been introduced to create more SEN provision within borough and reduce further pupils being placed in costly independent provision. The budget provision for 2020/21 has been based on the projected 2019/20 outturn costs reported in the January 2020 monitoring exercise. These budgets will be closely monitored each month and updates will be presented to the Forum on a regular basis.

**4.4.3 Central and Commissioned Services**

There have been some changes to central and commissioned services funding from the High Needs Block.

As reported via the budget monitoring reports in 2019/20, the Education Psychology Service and SEN Service have both undergone restructures to reflect the changing needs of the service due to increased demand. The full year costs of these re-structures are included in the 2020/21 budget and total £0.972m. The increased cost of the Speech and Language Service, £0.173m, is also included in the budget.

#### **4.4.4 High Needs Net Position**

As indicated in Appendix B, projected high needs costs for 2020/21 exceed budget provision by £2.8m and combined with the expected deficit carry forward from 2019/20, could result in an overall deficit of £8m. The HNB budget only reflects known expenditure so any increased in provision/cost will add to the overall deficit position.

**MUNICIPAL YEAR 2019/2020 – REPORT NO. 28****MEETING TITLE AND DATE:**

Schools Forum – 4 March 2020

**REPORT OF:**

Director of Education

Contact officer: Sangeeta Brown

Email: [sangeeta.brown@enfield.gov.uk](mailto:sangeeta.brown@enfield.gov.uk)**Recommendation**

To note the workplan.

<b>Agenda – Part: 1</b>	<b>Item: 6</b>
<b>Subject:</b> <b>Schools Forum: Workplan</b>	
<b>Wards: All</b>	

<b><u>Meetings</u></b>		<b><u>Officer</u></b>
May 2019	High Needs – Update & Discussion	
July 2019	Schools Budget – Outturn (2018/19) School Balances (2018/19) & Budget Review (2019/20) DfE Consultation: SEND – Call for Evidence Annual Audit – Update	LM SB SB LB
October 2019	Schools Budget: 2019/20 – Monitoring School Funding Arrangements (2020/21) DSG Analysis DfE Consultation; Financial Transparency & RPA	LM SB SB SB
December 2019	Schools Budget: 2019/20 – Monitoring Schools Budget: 2020/21: Update School Funding Arrangements (2020/21) Central Services Budgets	LM LM SB CS
January 2020	Schools Budget: 2019/20 – Monitoring Schools Budget: 2020/21: Update Scheme for Financing - Revisions High Needs Strategy - Update	LM LM SB SB
March 2020	Schools Budget: 2020/21: Update High Needs Places	LM SB
May 2020	TBC	
July 2020	Schools Budget – Outturn (2019/20) School Balances (2019/20) & Budget Review (2020/21) High Needs Review Annual Audit – Update	LM SB SB LB

**Dates of Meetings**

<b>Date</b>	<b>Time</b>	<b>Venue</b>	<b>Comment</b>
06 March 2019	5:30 - 7:30 PM	St Ignatius	
15 May 2019	5:30 - 7:30 PM	Orchardside	
10 July 2019	5:30 - 7:30 PM	Chace Community	
2 October 2019	5:30 - 7:30 PM	Orchardside	
11 December 2019	5:30 - 7:30 PM	Chace Community	
15 January 2020	5:30 - 7:30 PM	Chace Community	
4 March 2020	5:30 - 7:30 PM	TBC	
6 May 2020	5:30 - 7:30 PM	TBC	
15 July 2020	5:30 - 7:30 PM	TBC	

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