

Date of issue: 2<sup>nd</sup> May 2014

<b>MEETING:</b>	<b>SLOUGH SCHOOLS FORUM</b>
<b>SCHOOLS GROUP:</b>	Maggie Waller (Chair), John Constable (Vice Chair) Chris Aston, Louise Lund, Debbie Richards, Julie O'Brien, Paul Adams, Barbara Clark, Gillian Coffey, Paul McAteer, Kevin O'Driscoll, Jon Reekie, Mary Sparrow, Maggie Stacey, Jo Rockall, Virginia Barrett, Jean Cameron, Philip Gregory, Navroop Mehat and Hardip Singh
<b>OBSERVERS:</b>	Lynda Bussley
<b>ATTENDEES:</b>	Kathleen Higgins, Angela Mellish, Councillor Pavitar Mann, Helen Huntley, Nicky Willis
<b>LOCAL EDUCATION AUTHORITY:</b>	Ruth Bagley, Atul Lad, Steve Elson and Rajpreet Johal (Clerk)
<b>DATE AND TIME:</b>	WEDNESDAY, 7TH MAY, 2014 AT 8.00 AM
<b>VENUE:</b>	BEECHWOOD RESEARCH AND CONFERENCE CENTRE, LONG READINGS LANE, SLOUGH, BERKSHIRE, SL2 1QE

### AGENDA

<u>AGENDA</u> <u>ITEM</u>	<u>REPORT TITLE</u>	<u>PAGE</u>
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**Slough Schools Forum- Meeting held on Wednesday, 19th March, 2014**

**Present:** Maggie Waller, Holy Family Primary School (Chair)  
Louise Lund, Barney Bees Day Nursery  
Debbie Richards, Arbour Vale School  
Barbara Clark, Godolphin Junior School  
Paul McAteer, Slough and Eton C of E Business and Enterprise College  
Maggie Stacey, St Anthony's RC Primary School  
Jo Rockall, Herschel Grammar School  
Jean Cameron, Slough Children's Centres  
Philip Gregory, Baylis Court Nursery School  
Hardip Singh, Khalsa Primary School

**Observers:** None

**Attendees:** Helen Huntley (Haybrook College), Robin Crofts (Cambridge Education), Tony Smith (Cambridge Education), Eddie Neighbour (Slough Grammar School), Angela Mellish (St Bernard's Grammar School), Mike Hartley (Cippenham Primary School)

**Officers:** Jane Wood, Chris Aston, Barry Stratfull, Steve Elson, Atul Lad and Rajpreet Johal (Clerk)

**Apologies:** Paul Adams, Gillian Coffey, John Constable, Jon Reekie, Mary Sparrow, Virginia Barrett, Lynda Bussley, Nicky Willis and Navroop Mehat

**PART I**

**310. Apologies**

Apologies noted from John Constable, Jon Reekie, Navroop Mehat, Nicky Willis, Lynda Bussley, Mary Sparrow, Gillian Coffey and Virginia Barrett

Maggie Waller welcomed Jane Wood, Strategic Director of Wellbeing (Slough Borough Council), Chris Aston, Interim Head of Early Years, School and SEN Services (Slough Borough Council) and Barry Stratfull, Corporate Financial Controller (Slough Borough Council)

**311. Declarations of Interest**

None

**312. Minutes of Previous Meeting and Matters Arising**

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Maggie Waller to write to the Department for Education (DfE) to raise the concern on the impact of no funding being provided to support permanent expansions.

### Page 3

Robin Crofts reported that two dates have been set for the Chairs of Governors' Conferences: 7<sup>th</sup> July and 28/29 November.

Quarter 3 Budget Monitoring – Atul Lad confirmed that the majority of schools have responded regarding plans for balances and a response is awaited from St Joseph's.

### Page 4

Robin Crofts confirmed the draft SLAs will be sent out before the end of this term. The layout of SLAs is to be broken down into two components indicating those services without cost and traded elements.

## **313. 2014-15 Budget Process Update**

Atul Lad presented the report to inform the Schools Forum of the current position regarding 2014-15 school budgets. The budget allocation process is now complete for 2014/15.

Paul McAteer noted that the resource base places figures seem incorrect. Atul Lad and Steve Elson are to look into this outside of the meeting. (Note: since the meeting, resource base place figures have been clarified and agreed, with no changes being required.)

Maggie Stacey asked what data is used for primary lower attainment. Atul Lad to check with the Department for Education (DfE).

## **314. Growth Fund Outturn**

Atul Lad presented the report to inform the Schools Forum of the 2013-14 Growth Fund outturn.

Atul reported the fund was set at £385,000 and the report details the schools it has gone to. It was noted that the underspend of £54,353 will carry forward into 2015/16.

Atul reported that the agreed criteria for 2013/14 was that schools that have a bulge class or are in the first year of expansion receive funding.

There was discussion about the gap in funding for schools because of lag funding meaning that those schools not in the first year of expansion have been underfunded. This has been put right for 2014/15 by the change to the Growth Fund criteria and the increase of that fund to £1.5 million. However, schools missed out in 2013/14. Maggie Stacey proposed that there is a check on how many schools were not funded in 2013/14 as they were not in the first year of expansion.

Schools Forum agreed the need to look back at figures for 2013/14 and that this information be brought back to the 2<sup>nd</sup> May meeting alongside wider information regarding any schools which were not funded in the same way prior to 2013/14.

The DfE does not fund the LA for the additional pupils which the Growth Fund will fund in 2014/15. Barbara Clark asked who is responsible for going back to the Department for Education to argue this case for the Forum.

Maggie Waller to write to the Department for Education as the Schools Forum Chair, however the Forum felt it would be better to have a joint letter to go from the Forum and Local Authority. Jane Wood agreed to take this back to the Local Authority and Robin Crofts to take back through the School Places work. Jane Wood will raise the issue with Joseph Holmes.

It was noted that the current DfE Fair Funding consultation will also provide another vehicle by which to lobby the DfE.

Tony Smith suggested that other LAs will be in a similar position and a collective approach may be useful.

Report on Growth Fund outturn to come back to July's meeting.

### **315. PFI - paper to follow**

Maggie Waller updated the Schools Forum. Ruth Bagley has agreed that the paper on PFI will be coming to 2<sup>nd</sup> May meeting.

### **316. Funding for Specialist Leaders of Education**

Robin Crofts presented the paper on behalf of John Constable. The purpose of the report was to inform the Forum of the proposed allocation of a maximum £68k of funding currently held by Cambridge Education for School Improvement to be directed towards supporting the deployment of Specialist Leaders of Education through the Teaching Schools Alliance.

Reporting will be put in place on the use of the money through Cambridge Education and it will be evaluated and reviewed through the early stages of next year.

Maggie Stacey asked how schools will know what is available. Robin Crofts reported it will be promoted through Slough Learning Partnership, and Cambridge Education will link with them to identify particular priorities.

Helen Huntley asked that this also include special schools and PRUs.

### **317. Cambridge Education**

Robin Crofts provided a verbal update:

Further to the review that is being undertaken, Robin reported they have now met with all the team members in Cambridge Education. The Local Authority is in support of the recommendations in principle. Stakeholder meetings will be held in the near future with schools and early years providers being invited. Robin to

circulate some slides to the Forum with the minutes of this meeting giving an overview of the proposed developments.

### **318. Academies Update**

Formal arrangements are proceeding with Western House moving to academy status on 1<sup>st</sup> June.

Robin also informed the Schools Forum that some academies are looking at making payments to Chairs of Governors and that Ofsted is interested in maintained schools having similar flexibility. This is being pursued where academies consider it beneficial in strengthening governance and in turn strengthening schools and their standards.

### **319. 2013-14 Work Programme and Key Decisions Log**

Noted

### **320. Membership**

A review has been carried out of the balance of the current Schools Forum membership across phases, academies and maintained schools.

Table presented to the Forum shows current position regarding membership.

It was agreed that:

- Schools Forum membership should be increased to 21.
- Academy proprietors be asked to elect an additional academy representative, giving 9 academy members in total
- Academy proprietors be asked to consider this being Helen Huntley to represent the PRU and special academies.

The Schools Forum Constitution states that if members do not attend a number of meetings then the clerk will write to them. The Chair will follow up those who have had significant non-attendance.

Maggie Waller suggested that at July meeting there is a further update on membership.

### **321. Any Other Business**

None

### **322. DfE Fair Funding Consultation**

Atul Lad presented a supplementary paper on the DfE consultation on reform to the school funding system.

The consultation closes in April and a suggestion was put forward for a meeting of the formula 'Task and Finish' group. Paul McAteer to join the group. Thursday 24<sup>th</sup> April was suggested as the date of the Task and Finish group to be hosted at Slough & Eton School at 2pm.

Atul Lad reported that the changes proposed in the consultation do not impact on Slough except in relation to the area cost adjustment which is a concern in terms of salary bands for teachers. It was noted that this is also an opportunity to raise concerns with the DfE about the loss of the small school factor.

Jane Wood suggested information on the Growth Fund and expansions is ready for the Task and Finish group meeting

(Note: The Meeting opened at 8.15 am and closed at 9.35 am)

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### **What data is used to allocate Prior Attainment funding?**

An extract from the “2014-15 revenue funding operational guidance” published by the DfE in relation to the Prior Attainment factor.

*“9. **Prior Attainment** –Local authorities may use Early Years Foundation Stage Profile (EYFSP) and Key Stage 2 results to reflect the incidence of some kinds of SEN. The measure will apply to all pupils in the school with a valid result.*

*10. Primary schools: A new EYFSP was published in March 2012. The new Profile was introduced in September 2012 and the first assessments using the new Profile will take place in the summer of 2013. This means that for pupils in October 2013, pupils in year 1 will have been assessed using the new Profile and pupils in other years will have been assessed using the old Profile.*

*11. For pupils assessed using the old Profile, local authorities will continue to be able to choose between two EYFSP scores. Funding can be targeted to either all pupils who achieved fewer than 78 points; or all pupils who achieved fewer than 73 points on the EYFSP.*

*12. For pupils assessed using the new Profile, local authorities will be able to target funding at all pupils who did not achieve the expected level of development. In practice this means that we will provide two indicators at school level:*

*▪ Low Prior Attainment Primary (78) which will be derived from the number of pupils in years 2 to 5 who achieved fewer than 78 points and pupils in year 1 who did not achieve a good level of development.*

*▪ Low Prior Attainment Primary (73) which will be derived from the number of pupils in years 2 to 5 who achieved fewer than 73 points and pupils in year 1 who did not achieve a good level of development.*

*13. We will continue to monitor this indicator, but anticipate that as pupils on the new indicator work through the system, we will move to a new indicator.*

*14. For secondary schools, funding can be targeted at all pupils who achieved a Level 3 or below in either English **or** mathematics at Key Stage 2*

*15. In 2012 the KS2 English assessment methodology was changed and now includes a reading test, a new grammar, punctuation and spelling test and teacher assessed writing. For those assessed at Key Stage 2 up to 2011, the English element of the KS2 measure will identify those pupils who fail to achieve a level 4 in English. For pupils assessed at Key Stage 2 from 2012 onwards and who have been part of these new arrangements, the English element of the KS2 measure will identify those who do not achieve a level 4 in either the reading or teacher assessed writing elements.”*

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**SLOUGH SCHOOLS' FORUM**  
**Wednesday 7<sup>th</sup> May 2014**

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**PFI FUNDING OPTIONS**

**PURPOSE OF REPORT**

1. To launch a review of the schools' PFI contract and contributions in the light of changed circumstances.

**Recommendations**

2. The Council asks that:
  - the Forum expresses a view on how the immediate payment of the reserve of £500k should be distributed whether on the basis of the formula or in some other way
  - the Forum agrees to support a review of the overall PFI charge
  - the Forum participates in a consultation on the redistribution of the PFI funding gap to achieve a significant reduction to the figure of £810k on a phased basis

**Introduction**

3. The work on the Schools Funding Formula in 2012/13 highlighted the significant contribution the Council's General Fund had been making to education functions. The General Fund is the revenue resource available to all the Council's statutory and non-statutory services excepting housing delivery and DSG.
4. In the context of the diminishing resources of the Council and the increasing service demand this now represents a far greater burden on Council spending than in 2006 when the PFI contracts were established. The Council wishes to review the scale of the contribution and this report is the introduction to the first stage of that review.

**Background**

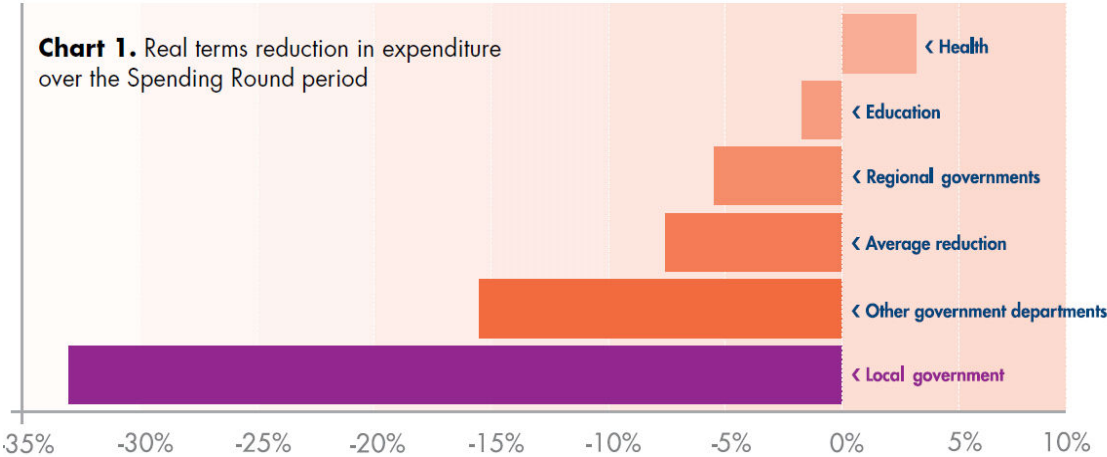
5. The entire PFI unitary charge is just over £2.3m for 2014-15.
6. At the time of the agreement of the PFI for three schools (Beechwood, Penn Wood and Arbour Vale) and to secure government approval the PFI charge was £2.1m and of this the Council committed to close a funding gap of £810k per annum. The Council's contribution represents the difference between the annual unitary charge and the PFI grant plus schools' contributions.
7. The Council's contribution comes into the High Needs Block (£310k) and the remaining £500k into the Schools Block.

8. The original business case for the council contributing to the schools PFI was due to:
- The capital funding arrangements at the time for financing major capital projects and the accounting regulations meant that it was necessary and beneficial to charge this to the General Fund rather than education budgets.
  - Some compensatory savings to placements costs achieved through placements at Arbour Vale.
9. The Council’s financial position is now dramatically different. Accounting regulations concerning the treatment of PFI have changed so that the charge to the General Fund is anomalous.

**The Council’s financial position**

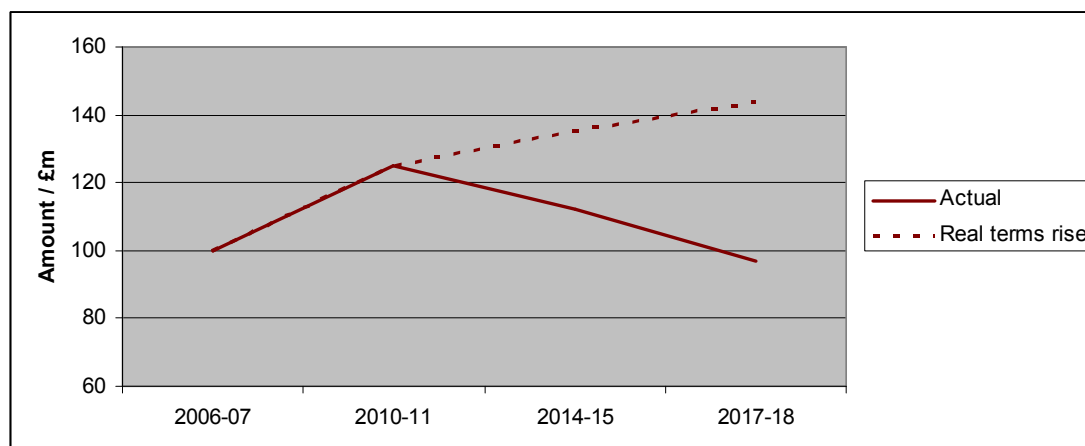
10. Since 2010 the public sector as a whole has faced a significant squeeze on its budgets, and this has been especially so in Local Government, see below:

**Chart 1: Spending reductions**



11. This recognises that all elements of the public sector have had to make savings. Whilst education budgets overall have been better protected the Council acknowledges that pressures on individual schools have varied with some schools now facing significant reductions.
12. For Slough Council itself, the chart below shows the overall changes to the net budget in recent years. Within this period of time, 2015-16 will see the largest reduction in Government funding, with a proposed reduction of approximately 28% compared to the previous year.

**Chart 2: Changes to the Council's net budget**



13. As can be seen from the above, in real terms, the Council's budget is predicted to be almost £50m lower in 2017-18 in real terms compared to 2010-11.

14. The Council's budget is also predicted to be lower in cash terms in 2018 than in 2006. This is in a period of inflation throughout, as well as increasing demographic and service demands and cost pressures on the Council's services overall, most significantly in both Children's and Adults' Social Care.

15. The funding of the Council's PFI contribution from the General fund reduces the funds available for the Council's other services.

16. In short, in this new harsher climate, the scale of the Council's contributions is unaffordable. The Council is seeking a significant reduction in the PFI charge against the General Fund. The Council is not unique in this. It is a route that others have already implemented.

### Short term adjustment

17. As part of the DSG formula review in 2013-14, the Council's contribution was temporarily reduced from £810k down to £310k, see the table below.

**Table 1: PFI contributions**

Year	DSG	SBC	Schools	Total
2012-13	£454,627	£809,542	£972,364	£2,236,533
2013-14	£981,084	£309,542	£1,001,779	£2,292,405
2014-15	£981,084	£309,542	£1,012,834	£2,303,460

18. The result of the above decision to the formula was that all schools' budgets were in effect top sliced to make up for these contributions. Pending consultation this situation continues through to 2014-15.

19. The £500k for 2013-14 has been maintained in a reserve and, though it is not bound by the formula, the Council wishes to distribute the reserve according to the formula or on another basis agreed with schools.

20. There is also a further pressure on the PFI budget in the form of the recent benchmarking exercise. This remains unresolved at present, but there is circa £180k of additional costs to the PFI that need to be met.

### **Next steps**

21. The Council now wishes to consult on how the PFI gap can be closed and/or funded in future.

22. Whilst wishing to secure a significant reduction to the charge on the General Fund, the Council proposes to maintain its contribution of £310k for the time being. The Council also recognises the challenge of managing reducing budgets and is seeking to make a phased reduction.

23. The Council therefore proposes that:

- The PFI contract is reviewed with the co-operation of the three schools to identify any contractual opportunities or service adjustments which could reduce the overall £2.3m burden. The Council will resource this review and any necessary challenge. It is proposed that a paper is brought back to the next Forum meeting with an indication of the nature, scale and timescale of the opportunity.
- Options for a phased reallocation of the funding gap across General Fund, education and schools budgets will be brought to the next Forum meeting.
- Following consultation, agreement on revised PFI contributions is sought from Schools Forum in autumn to enable early confirmation of Council and DSG budgets.

### **ADVICE RECEIVED FROM STATUTORY AND OTHER OFFICERS**

#### Borough Solicitor

24. Advice on the principle of the report has been sought and the Council's Legal Service will be a party to the contract review.

#### Section 151 Officer – Assistant Director Finance and Audit

25. The financial implications of the report are outlined in the supporting information above.

#### Access Implications

26. There are no access implications.

### **CONSULTATION**

#### Principal Groups Consulted

27. None.

Method of Consultation

28. Not applicable.

Representations Received

29. Not applicable.

**Contact for further information**

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**SLOUGH SCHOOLS' FORUM**  
**Wednesday 7<sup>th</sup> May 2014**

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**The Functioning of the Schools Forum**

**1 PURPOSE OF REPORT**

- 1.1 To inform members of the Schools Forum about the functioning of the Forum, laying out its powers and responsibilities (see DfE table at **Appendix A**). The report explains the steps of the process to do with addressing strategic financial matters which relate to schools' and early years' funding. This takes it from the point of the Local Authority making proposals for consideration by the Forum, with the Forum being consulted or in some instances making decisions prior to endorsement by the Local Authority.

**2 RECOMMENDATIONS**

- 2.1 That Schools Forum notes the process and makes any recommendations to improve on the process.

**3 REASONS FOR RECOMMENDATIONS**

- 3.1 To ensure that there is clarity about the functioning of the Schools Forum and that steps have been considered to ensure that it operates as effectively, efficiently, fairly and transparently as possible.

**4 ALTERNATIVE OPTIONS CONSIDERED**

- 4.1 None.

**5 SUPPORTING INFORMATION**

- 5.1 The latest version of the School Forum Constitution refers to the powers and responsibilities of the Schools Forum as shown below.
- 5.2 Section 3 from the Constitution agreed in February 2013 shown below refers to both the DfE table of roles and responsibilities (**Appendices A and B to this report**) and to the local process for the consultation and decision making framework (**Appendix C to this report**).

<b>Powers and Responsibilities of the Schools Forum</b>
<p>The Schools Forum is both a consultative and decision making body. Appendix X is a Department for Education table which provides an overview guide to the main powers and responsibilities of the Schools Forum.</p>

The local process for the consultation and decision making framework is attached as Appendix X

The Schools Forum has a duty to report to school governing bodies on the consultation in which it has been involved.

- 5.3 **Appendices A and B** show respectively the powers and responsibilities for 2013-14 with which members of the Forum will be familiar and the powers and responsibilities for 2014-15 taking account of latest guidance.
- 5.4 **Appendix C** of this report provides details about the local process for consultation and decision making. It lays out the steps in a clear linear progression through to endorsement by the Local Authority and explains about the exceptional involvement of the Department for Education for adjudication in cases where the Forum is not in agreement with Local Authority proposals.
- 5.5 Circulated with this report is a brief DfE guide to the operation of Schools Forums and a full operational guide can be found at: [www.gov.uk/government/publications/schools-forums-operational-and-good-practice-guide-2013](http://www.gov.uk/government/publications/schools-forums-operational-and-good-practice-guide-2013)

## **6 ADVICE RECEIVED FROM STATUTORY AND OTHER OFFICERS**

### Borough Solicitor

- 6.1 The relevant legal provisions are contained within the main body of this report.

### Section 151 Officer – Strategic Director of Resources

- 6.2 The financial implications of the report are outlined in the supporting information.

### Access Implications

- 6.3 There are no access implications.

## **7 CONSULTATION**

### Principal Groups Consulted

- 7.1 None.

### Method of Consultation

- 7.2 Not applicable.

## Representations Received

7.3 Not applicable.

## Background Papers

**Appendix A:** Schools Forum: Powers and Responsibilities 2013-14

**Appendix B:** Schools Forum: Powers and Responsibilities taking into account most recent guidance

**Appendix C:** Flow Chart showing the steps related to finance matters being considered by Schools Forum. This includes the way proposals are brought to the attention of the Forum for consultation and decisions followed by Local Authority endorsement and implementation. Once confirmed, this Appendix will become an Appendix of the Schools Forum Constitution.

Circulated with this report is a brief DfE guide to the operation of Schools Forums and a full operational guide can be found at:

[www.gov.uk/government/publications/schools-forums-operational-and-good-practice-guide-2013](http://www.gov.uk/government/publications/schools-forums-operational-and-good-practice-guide-2013)

## **Contact for further information**

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TABLE 1 - SCHOOLS FORUMS: POWERS AND RESPONSIBILITIES 2013-14

APPENDIX A

Function	Local Authority	Forum	DfE Role
1 Formula Change (including redistributions)	Proposes and decides	Must be consulted. [Voting restricted to schools members plus PVI members]	None
2 Contracts	Propose at least one month prior to invitation to tender, the terms of any proposed contract	Gives a view	None
3 Financial issues relating to: arrangements for pupils with special educational needs; arrangements for use of pupil referral units and the education of children otherwise than at school; arrangements for early years provision; administration arrangements for the allocation of central govt grants.	Consult annually	Gives a view and informs the governing bodies of all consultations carried out in lines 1, 2 & 3	None
4 Minimum funding guarantee	Proposes any exclusions from MFG for application to DfE	Gives a view	Approval
5 De-delegation for mainstream schools for: contingencies administration of free school meals insurance licences/subscriptions staff costs - supply cover support for minority ethnic pupils/underachieving groups behaviour support services library and museum services	Will propose	Primary and secondary school member representatives will decide for their phase.	Will adjudicate where Forum does not agree LA proposal
6 Central spend on funding for significant pre-16 pupil growth equal pay back-pay places in independent schools for non-SEN pupils early years expenditure	Proposes	Decides	Adjudicates where Forum does not agree LA proposal
7 Central spend on admissions servicing of schools forum carbon reduction commitment capital expenditure funded from revenue contribution to combined budgets schools budget centrally funded termination of employment costs schools budget funded prudential borrowing costs	Proposes up to the value committed in 2012/13 and where expenditure has already been committed	Decides for each line	Adjudicates where Forum does not agree LA proposal
8 Carry forward a deficit on central expenditure to the next year to be funded from the schools budget	Proposes	Decides	Adjudicates where Forum does not agree LA proposal
9 Scheme of financial management changes	Proposes and consults GB and Head of every School	Approves	Adjudicates where Forum does not agree LA proposal
10 Membership : length of office of members	Decides	None (but good practice would suggest that they gave a view)	None
11 Membership: appointment of Schools and Academies Members	Appoints those elected by members of the relevant sub groups. Facilitates election where required and appoints member if there is a tie or the election does not take place by a date set by the LA	None	None
12 Membership: Non Schools Members	Seeks nominations from the relevant bodies then appoints	None (but good practice would suggest that they gave a view)	None
13 Voting Procedures	None	Determine voting procedures	None
14 Chair of Forum	Facilitates	Elects (may not be an elected member of the council or officer)	None

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TABLE 1 - SCHOOLS FORUMS: POWERS AND RESPONSIBILITIES 2014-15 APPENDIX B

Function	Local Authority	Forum	DfE Role
Formula Change (including redistributions)	Proposes and decides	Must be consulted. [Voting restricted to schools members plus PVI members] and informs the governing bodies of all consultations	None
Contracts	Propose at least one month prior to invitation to tender, the terms of any proposed contract	Gives a view and informs the governing bodies of all consultations	None
Financial Issues relating to: arrangements for pupils with special educational needs; arrangements for use of pupil referral units and the education of children otherwise than at school; arrangements for early years provision; administration arrangements for the allocation of central gov't grants.	Consult annually	Gives a view and informs the governing bodies of all consultations	None
Minimum funding guarantee	Proposes any exclusions from MFG for application to DfE	Gives a view	Approval
De-delegation for mainstream schools for: contingencies administration of free school meals insurance licences/subscriptions staff costs - supply cover support for minority ethnic pupils/underachieving groups behaviour support services library and museum services	Proposes	Primary and secondary school member representatives will decide for their phase.	Will adjudicate where Forum does not agree LA proposal
Central spend and the criteria for allocating funding from: growth fund (to meet requirements for basic need and infant class size regulations) falling rolls fund for surplus places in good or outstanding schools where a population bulge is expected in 2-3 years	Proposes	Decides	Adjudicates where Forum does not agree LA proposal
Central spend on funding for significant pre-16 pupil growth equal pay back-pay places in independent schools for non-SEN pupils early years expenditure	Proposes	Decides	Adjudicates where Forum does not agree LA proposal
Central spend on admissions servicing of schools forum	Proposes up to the value committed in 2013/14	Decides for each line	Adjudicates where Forum does not agree LA proposal
Central spend on capital expenditure funded from revenue contribution to combined budgets schools budget centrally funded termination of employment costs schools budget funded prudential borrowing costs special educational needs transport costs	Proposes up to the value committed in 2013/14 and where expenditure has already been committed	Decides for each line	Adjudicates where Forum does not agree LA proposal
Carry forward a deficit on central expenditure to the next year to be funded from the schools budget	Proposes	Decides	Adjudicates where Forum does not agree LA proposal
Scheme of financial management changes	Proposes and consults GB and Head of every School	Approves	Adjudicates where Forum does not agree LA proposal
Membership : length of office of members	Decides	None (but good practice would suggest that they gave a view)	None
Voting Procedures	None	Determine voting procedures	None
Chair of Forum	Facilitates	Elects (may not be an elected member of the council or officer)	None

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Education  
Funding  
Agency

# Schools Forum

**A guide for schools and academies on its  
role and their responsibilities**

**June 2013**

## Introduction

1. The reform and simplification of local authority formulae has raised the profile of the work of Schools Forums. There is still widespread misunderstanding about the role of forums. The aim of this note is to give schools and academies a clear understanding of the role of their local Schools Forum and how to ensure the voice of the school is heard. This note applies to both academies and maintained schools.

## The role of Schools Forum

2. Schools Forum is made up of representatives from schools and academies, but with some representation from other non-school organisations, such as nursery and 14-19<sup>1</sup> education providers. The forum acts as a consultative body on some issues and a decision making body on others.
3. The forum acts in a consultative role for:
  - Changes to the local funding formula. (The local authority is responsible for the final decision, although in some cases it may delegate the decision-making power to the Schools Forum)
  - Proposed changes to the operation of the minimum funding guarantee
  - Changes to or new contracts affecting schools (e.g. school meals)
  - Arrangements for pupils with special educational needs, in pupil referral units and in early years provision
4. The forum is responsible for decisions on:
  - How much funding may be centrally retained within the Dedicated Schools Grant (e.g. for the Admissions Service, prudential borrowing costs, additional funding available for growing schools)
  - Any proposed carry forward of deficits on central spend from one year to the next
  - Proposals to de-delegate funding from maintained primary and secondary schools (e.g. for staff supply cover, insurance, behaviour support)
  - Changes to the scheme of financial management

## Schools' representation

5. Schools and academies representatives on the forum should be roughly proportionate to the number of pupils in each sector and would generally include representatives from:
  - Maintained nursery schools
  - Maintained primary schools
  - Maintained secondary schools

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<sup>1</sup> The requirement for a 14-19 representative will be replaced by a requirement for a Post-16 representative in the autumn of 2013

- Maintained special schools
  - Maintained pupil referral units
  - Academies and free schools
6. Middle schools do not form a category of schools in their own right and should be treated in accordance with their deemed status.
  7. Where there is at least one school in a particular category, there must be at least one representative for that group on the forum.
  8. Representatives should be elected by their peer group. In the case of maintained schools, representatives should be head teachers (or their representatives) or governors, elected by their appropriate phase. Academies members should be elected by the Academy Trusts in the local authority area.

## **Responsibilities of schools and their representatives**

9. Schools can expect to have their views canvassed and to receive feedback from their representatives, who have a responsibility to represent the interests of their peer group rather than the interests of their own individual school.
10. When electing an individual to represent the interests of their respective group, schools should satisfy themselves that their chosen representative(s) is competent to act as their advocate.
11. School staff and governors should ensure that they are aware of business under discussion at Schools Forum and should provide feedback to their elected representatives to ensure that their views are considered when decisions affecting schools' finances are being made

## **Responsibilities of Local Authorities**

12. Local authorities are required to publish all papers on a publicly-available website well in advance of the meeting. Papers should contain clear recommendations and the responsible officers should attend the meeting to provide further information and advice. Local authority officers should not dominate the meeting.
13. All meetings of the Schools Forum must be open to the public. Observers do not have an automatic right to speak at the meetings, although the Chair may allow contributions if it seems appropriate.

## **Further information**

14. Further information on Schools Forums, including a simple table which shows the decision making responsibilities of the Schools Forum, can be found on our website [Schools forum guidance](#).



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**Slough Schools' Forum – 2014-15 Work Programme**

Wednesday 7 May 2014

- PFI
- Schools Forum Operational and Decision Making Framework
- Cambridge Education
- Academies update
- 2014-15 Work programme and Key Decisions log

Wednesday 2 July 2014

- PFI
- Schools Outturn 2013-14
- Central Outturn 2013-14
- Growth Fund Outturn 2013-14
- School Budget Plans 2014-15
- Confirmation of Final DSG allocations 2014-15 (subject to DfE notification date)
- Cambridge Education – review outcomes and financial implications
- Academies update
- Dates of meetings – 2014-15 academic year
- 2014-15 Work programme and Key Decisions log
- Membership

September 2014

- DSG Centrally held items discussion begins
- Balance Control Mechanism
- Review of Scheme for Financing Schools
- Cambridge Education
- Academies update
- 2014-15 Work programme and Key Decisions log

October 2014

- Quarter 1 Budget Monitoring 2014-15
- 2015-16 Budget Process Update
- Academies update
- 2013-14 Work programme and Key Decisions log

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