

Schools Forum Agenda

Date: **Monday 11 October 2010**

Time: **5:00 – 7:00pm**

Venue: **Lewisham Learning and Development Centre**

Order of Business

1. **Minutes of Meetings: - Minutes of the meeting held on the 15 July 2010.**
2. **Matters Arising**
3. **DSG Formula Consultation – Dave Richards.** **For Discussion and Decision**

The Department for Education have issued a consultation on School Funding, it mainly covers the new proposed pupil premium. This paper gives further details and considers the response that is due by 18 October.
4. **Current budget pressures including bulge classes - Dave Richards** **For discussion and Decision**

A report to consider the financial pressure being created by the bulge classes and other budget monitoring issues
5. **Academies update – Dave Richards** **For Discussion**

To consider the current financial proposals for funding Academies.
6. **Update on Fraudulent Standing Orders - Alan Docksey** **For Discussion**

An update regarding fraudulent standing orders that had been set up on employees personal bank accounts.
7. **Report on Innovation Grant - Dave Richards** **For Discussion and Decision**

To update members on the scheme and to consider wider publicity of the scheme.
8. **Any other Business**

Dates of Future Meetings

18 November 2010

20 January 2011

17 March 2011

19 May 2011

Future agenda Items

18-Nov	Election of Chair and Vice-Chair Budget monitoring Report S52 Benchmarking Budget setting Finance Manual changes Audit Update Scheme of delegation changes
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LEWISHAM SCHOOLS FORUM

Minutes of the meeting held on Thursday 15th July 2010 at The Civic Suite, Lewisham Town Hall

Membership (Quorum = 40% i.e. 8)

✓ = present ✗ = absent

		Attendance
Primary School Headteachers		
Irene Cleaver	Athelney	Apologies
Steve Davies	Coopers Lane	Apologies
Liz Booth	Dalmain	✗
Paul Moriarty	Good Shepherd	✓
Juliet Cooper	Kilmore	Apologies
Nursery School Headteacher		
Nikki Oldhams	Chelwood	✓
Secondary School Headteachers		
Anne Potter	Addey & Stanhope	✓
Bob Ellis	Conisborough College	Apologies
Erica Pienaar (Chair)	Prendergast	✓
Barbara Williams	Sydenham	Apologies
Special School Headteacher		
John Sharpe	Brent Knoll	Apologies
Primary & Primary Special School Governors		
Keith D'Wan	Athelney	✓
Malcolm Conlan	Launcelot	✗
Brian Lymbery (Vice-Chair)	Lucas Vale	✓
Secondary & Secondary Special School Governors		
Terry Scott	Addey & Stanhope	✗
Michael Wheeler	Forest Hill	Apologies
Nick Day	Sydenham	✓
Parent Governors		
Roger Stocker	Conisborough College	✗
14-19 Consortium Rep		
Dympna Lennon	Addey & Stanhope	Apologies
Early Years Rep		
Val Pope	Pre School Alliance	✓
Diocesan Authorities		
Rev Richard Peers	Southward of Diocesan Board of Education	✗
Michael Cullinane	Archdiocese of Southwark Schools Commission	✗

Observers	
Alan Docksey	Head of Resources
Also Present	
Dave Richards	CYP Group Finance Manager
Juliana Poloczanska	Clerk
Chris Threfall	Head of Education Development
Sue Tipler	Head of Standards & Achievement
John Russell	Service Manager : Educational Access
Christine Grice	Head of Access & Support Services
Floyd Roberts	Principal Accountant Schools Team
Heather Day	Graduate Accountancy Trainee Schools Team

Apologies for Absence

Apologies were received from Frankie Sulkie, Irene Cleaver, Steve Davies, Juliet Cooper, Bob Ellis, Barbara Williams, Jon Sharpe, Michael Wheeler & Dymna Lennon. Keith D'Wan confirmed he had given apologies for the meeting of 20th May 10.

1. Minutes of Meeting held on 20th May 2010

The minutes were agreed and signed by Chair.

2. Matters Arising

None.

It was proposed that due to the current financial situation that hospitality would not be provided at future meetings, coffee would be still available. Agreed by members.

3. Children and Young People Directorate in-year savings and long term financial positions.

Alan Docksey presented the report that looks at the in-year savings Local Authorities are required to make and the likely budget reductions that will be required over the next three years.

The report highlighted reductions to the 2010/11 Area based Grants of £2.2m.

Discussions followed surrounding ICT Harnessing technology grant, the DfE announced further reductions on the 6th July making 50% cut in total grants. It was agreed that notification would be made via the schools mailing on Monday 19th July, with full details being published on the Fronter website before the end of the summer term. This will enable schools to prepare for these in year cuts, as budget plans submitted for 2010/11 would not include the reduction.

It was agreed that schools should be encouraged to work in quadrants in the Autumn term. The chair asked how do schools respond to cuts? work would need to continue on value for money and benchmarking, it was noted benchmarking for nurseries was still to follow.

The savings and the timetable reported to the Mayor and Cabinet this week needs to be communicated to schools, savings relating in 2011/14 could be reported in the Autumn term.

Action point : Schools to be notified regarding ICT Harnessing Tech cuts prior to end of summer term. 2011/14 savings to be communicated to schools in the Autumn term.

Action point : The LA will facilitate the quadrants working together by setting up meetings in September.

4. Special Educational Needs Review

John Russell outlined the considerations of the protocol for the assessments of SEN and the implementation of statements. Drawing attention to the cease to maintain policy, which allows statements to be

ceased in cases where pupils have met their targets and the timescale for resubmitted cases.

Concerns were raised regarding the expectations that schools would have to provide a certain amount of funding from their resources to supplement the matrix money. It was noted that if a particular school had a disproportionately high level of SEN this would be unfair.

Discussions followed regarding the need to communicate strategies to parents and the need to draw on partnerships from the private and voluntary sectors.

Decision : Take to next Secondary Strategic and return to future Schools Forum

5. Capping of school carry forwards

Dave Richards reported on the three schools that exceeding the capping limit without authorisation. It was noted any balances capped would be used to finance bulge classes.

Adamsrill has exceeded the cap for two years running therefore members decided to cap the excessive balance of £98k, agreeing that the school could appeal to the LA.

Decision : Excessive balance to be capped

Grinling Gibbons have not previously exceeded the cap, it was agreed that the balance would not be capped.

Decision : No capping

Holy Trinity has exceeded the cap for two years running therefore members decided to cap the excessive balance of £82k, agreeing that the school could appeal to the LA.

Decision : Excessive balance to be capped

Both schools capped to be informed and of their ability to appeal to The Executive Director and Head of Resources.

6. Early years pilot

Members were updated on the current position and the progress of the pilot scheme. The opinion was put forward that terms of reference for any future groups need to be tighter and also that day to day implications were not modelled.

It was noted that charging for additional hours was agreed at the Mayor and Cabinet on the 14th July, the standard rate across all Lewisham schools to be £4.50 per hour.

Decision :The sub group will review the early year changes next year

7. Carbon Reduction Commitment (CRC)

Dave Richards presented this report, making members aware of the scheme and highlighting possible fines that will be passed onto school. All schools must register their meters by September 10, 19 schools

have yet to submit data. Officers are to follow up each school individually.

Decision : A further report would be submitted to Forum in the Autumn.

8. FMSiS

Dave Richards presented a report updating members on the progress of FMSiS, it was noted all schools have met the standard apart from Forest Hill Secondary, Secondary's have been assessed for the second time.

Concern was voiced as although the assessments are to be carried out every three years, some schools are being assessed sooner, depending when in the Financial year the assessments are being carried out. However schools will on average be assessed every three years.

9. Expansion of Academies policy

Dave Richards explained that Lewisham has 21 outstanding schools and it was brought to members attention what the financial impact would be on the DSG, if these schools decided to become academies.

It was noted that the Roman catholic Archdiocese was urging schools not to choose this option.

10. Any other business

Alan Docksey updated schools regarding fraudulent standing orders that had been set up on employees personal bank accounts, a line of enquiry has been identified, an update would be given to members at a later meeting.

SCHOOL FORUM ACTION SUMMARY – from School Forum held on 15th July 10

ITEM	ACTION TO BE TAKEN	OFFICER(S) RESPONSIBLE FOR ACTION	OUTCOME / CURRENT POSITION
3	Schools to be notified regarding ICT Harnessing Tech cuts prior to end of summer term. 2011/14 savings to be communicated to schools in the Autumn term. The LA will facilitate the quadrants working together by setting up meetings in Sept	Dave Richards	
4	Take to next Secondary Strategic and return to future Schools Forum	John Russell / Sue Tipler	
5	Excessive balances for Adamsrill and Holy Trinity to be capped.	Dave Richards	
6	The sub group will review the early year changes next year.		
7	CRC update to be given in Autumn term	Alan Docksey	
AOB	Report on Fraudulent Standing Orders	Alan Docksey	

SCHOOL FORUM ACTION SUMMARY – from School Forum held on 20th May 10

ITEM	ACTION TO BE TAKEN	OFFICER(S) RESPONSIBLE FOR ACTION	OUTCOME / CURRENT POSITION
3	Recommendations to be reviewed and brought back for agreement	John Russell	Reported at 15 July meeting
5	A report be presented to the next forum to confirm whether any schools should be capped A report to be brought to the next forum	Dave Richards / Sue Tipler Dave Richards	Reported at 15 July Meeting
8	The academies to be contacted to appoint a representative to Forum.	Dave Richards	LA was notified of the academy representative July as Declan Jones HAKA
AOB	Report on Innovation Grant	Dave Richards	

Future agenda Items

18-Nov	Election of Chair and Vice-Chair Budget monitoring Report S52 Benchmarking Budget setting Finance Manual changes Audit Update Scheme of delegation changes
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Consultation on School Funding 2011-12 – Introducing a Pupil Premium.

1. Purpose of the Report

To agree the draft response to the Department for Education (DfE) consultation on school funding and particularly the introduction of a pupil premium.

2. Background

The previous Government on 15 March 2010 launched a consultation on School Funding. The aim was to consider the development of a single transparent formula for the distribution of Dedicated Schools Grant. This was to try and ensure resources were provided in line with relative need and recognition is given to the different costs of educating particular groups of pupils and providing education in different areas. The consultation also talked about a local pupil premium.

As we know a new UK Government took office on 11 May and in July announced a fresh consultation. The consultation mainly considers how a pupil premium could be introduced for disadvantaged pupils. The consultation does not contain proposals on developing a new formula but proposes to retain the existing funding methodology for 2011/12.

The consultation document can be found via the following link

<http://www.education.gov.uk/consultations/index.cfm?action=consultationDetails&consultationId=1723&external=no&menu=1>

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3 Pupil Premium

- 2.1 One of the Coalition Government's key priorities is to introduce a pupil premium to support disadvantaged pupils, who continue to underachieve when compared with their peers. The Government plans to introduce the pupil premium in September 2011 to support disadvantaged pupils from Reception to Year 11. Schools will decide how the premium is used to support the attainment of disadvantaged pupils. The intention is to allocate the funding by means of a separate specific grant and not through the Dedicated Schools Grant (DSG).
- 2.2 The consultation document suggests that the premium will overcome the current inequalities in funding Local Authorities for deprivation but does not expand further on those inequalities.

- 2.3 Looked After Children (LAC), who generally have poor attainment, will be covered by the pupil premium using a separate process via local authorities since deprivation indicators do not generally pick them up accurately.
- 2.4 The consultation document's main theme is which indicators should be used for the premium, the following options are proposed
- Free School Meal entitlements at the census date
 - A so called "ever" Free school Meals eligibility, which means a pupil would be counted if they received a free meal entitlement over the last three or six years
 - Pupils in families in receipt of out of work tax credit
 - ACORN or MOSAIC data

The later two are geographical based indicators identifying groups of households based on consumer behaviour.

- 2.5 No announcement has been on the level of the pupil premium, this will not be made until after the October spending review. The suggestion is that it will not be fully funded straight away and only will be when it is affordable by central government. The consultation documents demonstrate the effect of the phasing over a four year period.
- 2.6 The Liberal Democratic manifesto originally talked about investing £2.5 billion into the per pupil premium with around 1 million pupils with a free meal entitlement attracting £2,500 per pupil. The current funding assumed within the DSG for deprivation is £3 billion. The current funding Lewisham receives for deprivation is £25m. It would seem highly unlikely that with the current well known state of the country's finances that in the early years of the phasing there will be the scope to find these significant level of resources. If a quarter is found the rate of funding would £600 per free meal entitlement.
- 2.7 The funding to be received by each Local Authority will be calculated by
- A) Multiplying the indicator (say free meal entitlements) used by a notional rate of funding
 - B) This will be then increased for any Local Authority to which the Area cost adjustment is applicable to.

Then

- C) The current level of funding received by the Local Authority for deprivation funding is deducted from this,

D)The difference (the result in C above) is then phased in over a number of years

The funding received in the first year will be

C (the current level) Plus D (the phased increase)

- 2.8 Over time, this will mean that the same amount of funding will be available for deprived children no matter where they live apart from the area cost adjustment. It is possible that some authorities may not receive any funding as their current funding for deprivation is above the pupil premium. It is planned to protect these authorities.

3 Other Consultation Issues

3.1 Funding Arrangements for 2011-12

To provide stability and clarity the Government is proposing to retain for 2011-12 the current system for allocating the DSG, based on the "spend-plus" methodology. The intention is to mainstream relevant grants into the DSG but to allow local authorities to use previous levels of grant as a factor in their local formulae to support stability in funding at school level.

3.2 Three Year Old Top-ups

The current funding system provides that if your take-up of the free early years entitlement for three year olds is less than 90% of your population then you are still funded at your 90% level. The consultation seeks views on whether funding for three year olds should reflect actual take up or continue to reflect a minimum of 90% participation where lower. This only has a marginally effect for Lewisham as currently we have only 8 pupils under the 90% limit. This equates to us receiving £18k that we would not receive if the change was implemented.

3.3 Dual Registration

The proposal is to cease to provide DSG for dual registrations of pupils registered at pupil referral units. This was expected as it was considered in the last consultation, in fact this is not a policy change rather a change due to the improvement in the collection of data which allows dual registrations to be identified. It is anticipated that the loss to Lewisham will be £200k, although other Local Authorities are facing greater losses.

3.4 Home Tuition

There is a commitment to provide some financial support to Local Authorities to reflect some of the costs of supporting pupils taught at home, this will be at 10% of the per pupil funding rate. Currently we have about 150 pupils who are taught at home and our funding rate would be £600 per pupil. This would mean under the proposals we are likely to receive £90k.

4. Next Steps

The consultation runs from 26 July to 18 October - 12 weeks. The intention of the DfE is to give indicative DSG allocations for 2011-12 to local authorities, and to announce the level of the pupil premium for each local authority, in November or early December, following the Comprehensive Spending Review announcement on 20 October 2010. There is a commitment to work with partners to review the methodology for funding academies from 2011-12.

5. Areas of concern

It is difficult to interpret and therefore put into context the proposals, as no financial effect is given to the different indicators being suggested for the pupil premium. Indeed the disadvantage and advantages of each are not fully explained.

Clearly the fact that the proposal maintains the area cost adjustment (ACA) is essential to Lewisham as our current funding has a uplift of 29% to reflect the extra costs of being an inner London Borough. Although it must be noted with caution that the overall ACA for the Borough is being consulted on by the Department for Communities and Local Government and there could be changes in the future. Whether this will be reflected in the pupil premium ACA is unknown.

As we all know we are in a period of economic restraint where reductions are being proposed to Local Government expenditure in the range of 25% to 40%. The economy of Lewisham is based on a large part of the population working in the public sector; either working in the borough or outside. Undoubtedly with these reductions there will be more families out of work and the likelihood of greater deprivation. It would seem not only appropriate but advantageous that any indicator that was used was up to date to reflect these changes. Logically the assumption would be that the out of work tax credit indicator would be the most appropriate. However in fact the only data on this currently relates to 2005 which would mean that the above economic circumstances would not be reflected. Free meals entitlement numbers would be taken from the January census data and updated annually and would therefore be the most up to date indicator in the current climate.

The document does not discuss actual needs of deprived pupils; the pupil is either tagged "deprived" or not. This does not take into account

the incidence of deprivation which influences the costs for schools in high areas of deprivation.

Needs and free meals do not have a linear relationship. If a school has a class of the 30 and 1 pupil has a free meal there is probably no extra costs being incurred by the school, indeed this may be true for say 5 pupils. However when this number reaches 10 the costs may escalate as extra staff are employed such as learning support assistant. Further, if the number reaches 20 or 30 extra teachers or much smaller classes maybe needed

It would seem that the effect of the pupil premium funding schools with small numbers of children eligible for free school meals would be to dilute the resources to the detriment of areas of high deprivation. In fact in Lewisham this is recognised in the deprivation funding factors; both the mainstream schools percentage based AEN allocation and the early years deprivation factor do not fund below a certain incidence. Further, in both these areas, those settings with a large percentage of their pupil population on free meals receive enhanced funding to reflect the cost of high incidence.

The DfE proposals are fairly simplistic, a pupil either attracts funding or not. Therefore it assumes all need is the same and does not take into account the multiple layers of deprivation such as mobility, language, neighbourhood and peer groups.

The proposal to use Free Meals “ever” (i.e. to count a pupil so they attract deprivation funding if they have a free meal entitlement in either the last three or six years) would provide funding for those pupils who may fall in and out of need. Although it dilutes the funding for those pupils who are only entitled to funding for one year and whose needs may not be that significant to warrant resources over the three or six year period.

It is difficult to say what the exact effect of the proposal on Lewisham would be. The consultation provides no financial modelling and the national datasets we have are not necessarily robust, as they are not subject to a high level of audit. Our own calculations suggest both free meal entitlements and out of work families tax credits would provide slightly more resources to us. The more difficult question is whether we are receiving our fair share and is it sufficient to meet our needs.

The current funding system is based on a historical funding formula that existed in 2005/6. The formula took into account family tax credits, (funding was only received over a set threshold level, so low levels of need were not funded) and the number of pupils with English as an additional language. Neither of these factors are included in the new proposed formula, so proportionally our share of the funding cake will decline.

The advantages and disadvantages of each indicator is shown in Appendix A.

4. Consultation response

A draft response form is shown in Annex B for members to comment on.

5. Conclusion

It is essential that we ensure that the Dedicated Schools Grant is allocated to all pupils as fairly as possible. The danger with a consultation document like this is that we could be disadvantaged and we need to make sure the children of Lewisham's needs are fully met. Certainly the fact that children with EAL have been funded in the past but will not be in future will be to our disadvantage. Any system needs to reflect real need but be responsive to that need. It is disappointing that the consultation contains no details on how the proposals may effect individual local Authorities and does not help putting the principles into context.

Dave Richards

Group Finance Manager – Children and Young People

Contact on 0208 3149 442 or by e-mail at Dave.Richards@Lewisham.gov.uk

Schools Forum
11 October 2010
Item 3 – Appendix A

Indicator	Description	Advantages	Disadvantages
Free Meals	Individual pupils known to be eligible to receive free school meals. Pupils are counted once a year on the January School Census. Eligibility is based on parental income. Parents have to apply for free school meals at the school or LA.	<ul style="list-style-type: none"> • Targets funding at the individual pupil. • Based on the specific characteristics of the pupil rather than the area they live in. • Data is already collected • Recognised and understood • Updated each year 	<ul style="list-style-type: none"> • Relies on parents claiming FSM • There is proportionally fewer free meals in secondary, probably due to less parents registering.
Free School Meals ever (3 or 6 year)	As above, but counts a pupil if they have been eligible for Free School Meal in the last three or six years.	<ul style="list-style-type: none"> • As above • Includes those children in families where eligibility fluctuates as parents are in or out of work 	<ul style="list-style-type: none"> • Dilutes the funding, as some pupils receive funding when they only receive free meal for a short period
Tax Credit Indicator	An indicator developed to identify those families where Child Tax Credits are being claimed where both parents are not working and claiming the out of work tax credit.	<ul style="list-style-type: none"> • Included families just above the Free school meals threshold. 	<ul style="list-style-type: none"> • Data not collected on an annual basis, so out of date. • Data only at area levels so reflects the characteristics of the area the pupil lives in
MOSAIC / ACORN	Categorises postcodes based on census and other consumer information.	<ul style="list-style-type: none"> • Able to build in different levels of deprivation 	<ul style="list-style-type: none"> • Data only at area levels so reflects the characteristics of the area the pupil lives in.

Consultation on School Funding 2011-12: Introducing a Pupil Premium

Consultation Response Form

The closing date for this consultation is: 18
October 2010

Your comments must reach us by that date.

THIS FORM IS NOT INTERACTIVE. If you wish to respond electronically please use the online response facility available on the Department for Education e-consultation website (<http://www.education.gov.uk/consultations>).

Information provided in response to this consultation, including personal information, may be subject to publication or disclosure in accordance with the access to information regimes, primarily the Freedom of Information Act 2000 and the Data Protection Act 1998.

If you want all, or any part, of your response to be treated as confidential, please explain why you consider it to be confidential.

If a request for disclosure of the information you have provided is received, your explanation about why you consider it to be confidential will be taken into account, but no assurance can be given that confidentiality can be maintained. An automatic confidentiality disclaimer generated by your IT system will not, of itself, be regarded as binding on the Department.

The Department will process your personal data (name and address and any other identifying material) in accordance with the Data Protection Act 1998, and in the majority of circumstances, this will mean that your personal data will not be disclosed to third parties.

Please tick if you want us to keep your response confidential.

Reason for confidentiality:

Name London Borough of Lewisham
Organisation (if applicable) School Forum
Address: Town Hall
Catford Road
Catford
London

If your enquiry is related to the policy content of the consultation you can contact either:

Juliet Yates on: telephone: 020 7340 8313 e-mail:

juliet.yates@education.gsi.gov.uk, or

Ian McVicar on: telephone: 020 7340 7980 e-mail:

ian.mcvicar@education.gsi.gov.uk

If you have a query relating to the consultation process you can contact the Consultation Unit on telephone: 0870 000 2288 or email:

consultation.unit@education.gsi.gov.uk

Please select **ONE** category which best describes you as a respondent:

<input type="checkbox"/> School	<input checked="" type="checkbox"/> Schools Forum	<input type="checkbox"/> Governor Association
<input type="checkbox"/> Teacher	<input type="checkbox"/> Local Authority Group	<input type="checkbox"/> Individual Local Authority
<input type="checkbox"/> Teacher Association	<input type="checkbox"/> Other Trade Union/Professional Body	<input type="checkbox"/> Early Years Setting
<input type="checkbox"/> Campaign Group	<input type="checkbox"/> Parent/Carer	<input type="checkbox"/> Other

Please Specify:

1 Do you agree it is right to give a higher premium to areas that currently receive less per pupil funding? [Paras 24 - 27]

Yes

No

Not Sure

Comments:

No, the funding system must address need and take into account that where there is a high incidence of deprivation. The cost of meeting need in highly deprived areas is proportionally much higher due to the multiple layers of deprivation. It is too simple to say that all pupils with a free meal entitlement needs the same level of support, some pupils are exposed to a multiple factors of deprivation such as EAL, local neighbourhoods and peer groups which will mean the cost of meeting the needs of deprivation is much greater. These multiple layers of deprivation are not recognised in the proposed methodology but simplifies deprivation to an either / or scenario.

There is also not a direct linear correlation between the number of "deprived" pupils and the cost of meeting the needs. For example a class of 30 children with all the children from deprived background have proportionally greater needs than a class with 5 pupils from deprived backgrounds. The effect of funding all pupils in the same way is that resources are diluted from the most needy to the least needy.

2 What is your preferred deprivation indicator for allocating the pupil premium? [Paras 29 - 50]

FSM - in year

FSM ever - 3 year

FSM ever - 6 year

Out of Work Tax Credit

ACORN/MOSAIC

Other (not listed)

Not Sure

Comments:

Of the options provided our preferred option is free meals, but this is due to the fact that the data on out of work tax credits is so out of date currently that it will not reflect current need.

If the Government does decide to pursue a single measure of deprivation when allocating the pupil premium then other indicators of deprivation such as pupil mobility and EAL still need to be recognised as an addition to the pupil premium. This could be done via an additional pupil premium for multiple deprivation to recognise the exponential impact that multiple deprivation has on educational attainment.

We suggest that if the government is to use the pupil premium as the main means of allocating deprivation funding to schools in the longer term then a hybrid measure that better reflects deprivation, rather than the single measures will need to be developed to ensure that deprivation funding is targeted at the right pupils.

Deprivation measures do not capture all pupils with Special Educational Needs (SEN). The consultation document suggests that the overlap between deprivation and SEN means that funding doesn't need to be targeted separately to SEN however SEN varies with factors other than deprivation and these need to be reflect.

3 Do you agree the coverage of the pupil premium should include Looked After Children? [Paras 51 - 54]

Yes

No

Not Sure

Comments:

We agree that Looked After Children need additional support in order to improve their educational attainment and that the pupil premium should include Looked after Children.

The intention to limit the eligibility of the pupil premium to those children who have been in care for more than six months seems in contrary to your point that many Looked After Children may be in care for short periods or come in and out at regular intervals. As such it is important that the proposed six month criteria applies in aggregate so as not to exclude children from eligibility where they come in and out of care several times in a given year.

There is administrative overhead of the payment of the premium from home

authorities to educating authorities which creates additional financial burdens on local authorities and that burden should be fully funded.

4 What are your views on the operation of the Looked After Children element of the pupil premium? In particular, how might the funding arrangements work at local authority level for pupils educated outside of the local authority with caring responsibility? [Paras 55 - 60]

Comments:

This data should be collected from Local Authorities rather than go into costly methods of re-couplement between authorities

5 Do you think the coverage of the pupil premium should be extended to include additional support for Service children? [Paras 61 - 66]

Yes

No

x Not Sure

Comments:

N/A for Lewisham

6 Should the pupil count for three year olds, used to allocate DSG for 2011-12, reflect actual take up or continue to reflect a minimum of 90% participation where lower? [Paras 75 - 76]

<input checked="" type="checkbox"/> Actual Take-Up	<input type="checkbox"/> 90% Minimum	<input type="checkbox"/> Not Sure
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Comments:

Yes, it should reflect the actual take up.

7 Should the pupil count used to allocate DSG for 2011-12 continue to reflect dual subsidiary registrations for pupils at pupil referral units? [Paras 77 - 78]

<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not Sure
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Comments:

Agree

8 Do you support our proposals for additional support for schools catering for Service children? [Para 79]

Yes

No

Not Sure

Comments:

N/A for Lewisham

9 Do you support our proposals for home educated pupils? [Para 80]

Yes

No

Not Sure

Comments:

We support the view that local authorities should be given funding to help meet the costs of central services that they provide to home educated pupils.

10 Do you think that there should be a cash floor at local authority level in 2011-12? [Para 85]

Yes

No

Not Sure

Comments:

It is very difficult to comment on the application of a cash floor for local authority funding in 2011-12 without knowing the outcome of the Spending Review, and the impact of any changes to the MFG which will need to be delivered by local authorities.

11 Have you any further comments?

Comments:

If the role of the local authority is to be that of passporting the pupil premium to schools, there will be a reduction in their function in targeting deprivation and improving standards in schools and the benefit of local authority expertise to schools may be lost. These central services are undertaken in agreement with Schools Forum in order to deliver value for money. If in calculating the proposed top up it an adjustment for this central expenditure needs to be made or otherwise essential support services to schools will be lost.

In addition, if the process of passporting the pupil premium (or any other administrative function required of local authorities in relation to the pupil premium) creates financial burdens for local authorities we would ask that these additional burdens are fully funded such that the impact does not fall on local council taxpayers.

Thank you for taking the time to let us have your views. We do not intend to acknowledge individual responses unless you place an 'X' in the box below.

Please acknowledge this reply

Here at the Department for Education we carry out our research on many different topics and consultations. As your views are valuable to us, would it be alright if we were to contact you again from time to time either for research or to send through consultation documents?

Yes

No

All DfE public consultations are required to conform to the following criteria within the Government Code of Practice on Consultation:

Criterion 1: Formal consultation should take place at a stage when there is scope to influence the policy outcome.

Criterion 2: Consultations should normally last for at least 12 weeks with consideration given to longer timescales where feasible and sensible.

Criterion 3: Consultation documents should be clear about the consultation process, what is being proposed, the scope to influence and the expected costs and benefits of the proposals.

Criterion 4: Consultation exercises should be designed to be accessible to, and clearly targeted at, those people the exercise is intended to reach.

Criterion 5: Keeping the burden of consultation to a minimum is essential if consultations are to be effective and if consultees' buy-in to the process is to be obtained.

Criterion 6: Consultation responses should be analysed carefully and clear feedback should be provided to participants following the consultation.

Criterion 7: Officials running consultations should seek guidance in how to run an effective consultation exercise and share what they have learned from the experience.

Schools Forum
11 October 2010
Item 3 - Appendix B

If you have any comments on how DfE consultations are conducted, please contact Donna Harrison, DfE Consultation Co-ordinator, tel: 01928 794304 / email: donna.harrison@education.gsi.gov.uk

Thank you for taking time to respond to this consultation.

Completed questionnaires and other responses should be sent to the address shown below by 18 October 2010

Send by post to: School Funding Consultation 2011-12, Funding and Technology Unit, Department for Education, Level 3, Sanctuary Buildings, Great Smith Street, London SW1P 3BT.

Send by e-mail to: dsg.consultation@education.gsi.gov.uk

Budget Monitoring 2010/11 as at end of August 2010

1. Purpose of the Report

To consider latest forecast position for 2010/11 and to consider the action to address the overspends on Bulge classes.

2. Recommendation

- i) The Forum note the current forecast outturn position.
- ii) The Forum agree for officers to ask schools how they have used the funding provided to determine appropriate levels in the future.

3. Budget monitoring position for August

- 3.1 Appendix B gives a detailed breakdown of the monitoring situation. It is pleasing to note that the budgets for Special Educational Needs are now within the budget that was set.
- 3.2 We received notification from the Department of Education (DFE) of the final Dedicated School Grant on the 1 July 2010. The figure was £187,433k which was £51k lower than the originally expected. This was due to some pupils that were on both the role of Academies and Maintained Schools which were disallowed by the DFE. The sum can be accommodated in the contingency.
- 3.2 When setting this years budget it was anticipated that there would be a need to accommodate between 450 and 510 extra pupils. As, these pupils were not in school on the count date, no funding was received for them. They only attract funding from 2011/12. Some schools have the capacity to absorb these pupils but when their class capacities were reached another class was needed, which of course requires extra capital works, teaching staff and associated costs. The capital element will be met centrally. The total allowed for these so called bulge classes was £654k.
- 3.3 At the time of setting the budget negotiations were still going on with schools to set up the classes. The budget provided for 15 classes with half of them opening in September and half in January. It was also assumed in line with previous years that half of the pupils would enter in September and the remainder in January. In fact the proportion starting in September is 71%

- 3.4 Currently 17 classes are needed and 12 have already opened. The cost of this using last years methodology of funding is £983k, creating a budget pressure of £332k.
- 3.5 At the last Schools Forum meeting the budget pressure was already known and it was agreed that any schools carry forward that were capped through the Balance Control Mechanism (subject to appeal by the schools concerned) would be applied to the shortfall in funding. The appeals have not been upheld and the capped funds of £178k are available to meet part of the difference. Which still leaves a budget pressure of £154k

4. Bulge Classes

- 4.1 When the primary school applications were received in November 2009 the LA had to identify if there would be sufficient places to accommodate all those seeking a place. This led to the decision by the LA to establish additional reception classes in consultation with schools. The timing was just sufficient to enable the primary schools in question to determine how they would resource the additional class in the school.
- 4.2 The circumstances in some schools call into question the funding of some September classes
- A school where anticipated September starters did not materialise and the school ended up with two September classes and only 28 pupils.
 - A school with over 30 September starters and a second September class, but which reports normally having the second class open anyway.
 - A school with over 30 September starters and a second September class, but which reports there is often a need for a second class depending on dates of birth.

5. Funding provided to schools

- 5.1 The schools that open the bulge classes are given the details of the finance in advance to allow them to consider their budget position.
- 5.2 The funding position is relatively simple. The school attract funding for 30 extra pupils at the same rate as the Age Weighted Pupil Unit (AWPU), a sum for once off resources needs and a further sum for ongoing resources needs. The resources sum enables the school to purchase all the curriculum resources for the school as being a new class none will exist, such as a full set of books etc. The once off sum is to set up the admin systems. The detailed rates are shown in Appendix A and this is in line with the funding given out in the past to schools who have opened new classes.

- 5.3 Within the AWPU there is a sum that is allowed for management costs at a rate of £481 per pupil. This means that a school who opens a class in September would receive for the current financial year £8,420. It is debatable whether the school will need this level of support, it is probable that any management time is absorbed within the existing management structure within the school and a school would not employ extra staff and thus incur any extra expenditure. Leaving the money as a surplus.
- 5.4 For the current 17 schools the funding for management element of the formula amounts to £119k. One proposal would be to withdraw this funding and to use it offset the budget pressure.
- 5.5 There are number of issues to consider with this proposal
- It goes against the assurances that officers have given these schools.
 - Schools will or should have budgeted for this expenditure although they may have placed the sum in contingency or offset other pressures
 - Longer term, it may be more difficult in setting up bulge classes if schools are wary that the funding may be reduced or consider it less generous in the past.
 - It may introduce an element of unfairness as schools in the past that have taken bulge classes are funded for form of entry as they progress through the school. The funding levels follow those describe in 5.2. Hence there would be two funding levels depending on the year the class has opened.

Conclusion

The bulge classes present us with an immediate budget problem that needs addressing. The current method of funding bulge classes looks generous but this can only be confirmed with the schools concerned by reviewing how they are using the funding. The times of plenty have ended and the sums offered in the past will not be available in the future . The funding for bulge classes needs to be fair to all and at an appropriate level. It would seem reasonable to consider this when the Schools Forum set next years budget.

Dave Richards

Group Finance Manager – Children and Young People

Contact on 0208 3149 442 or by e-mail at Dave.Richards@Lewisham.gov.uk

Budget Monitoring Position 2010/11 as at August 2010

Breakdown Of Reception AWPU Funding Level

	Per Pupil £	*30 £	7 months £
Teacher	1,754	52,620	30,695
Other Staff - Nursery Nurse	865	25,943	15,133
Other Staff - Meal Supervisor	83	2,501	1,459
Supplies & Services	102	3,060	1,785
Overhead ("M'ment")	481	14,434	8,420
Supply	15	435	254
Roll Related	25	735	429
School Improvement	8	233	136
Fair Funding	7	214	125
Payroll	7	219	127
Infant Class Size	38	1,142	666
Personalisation	14	417	243
	<hr/>		
	3,399	101,953	59,472
New Reception Class (Once Off)	-	3,728	3,728
Resources (Annual)	286	8,574	8,574
	3,685	114,255	71,774

Ref	Heading	Budget £'000	Actual £'000	Variance £'000	Comments
1.0.1	Individual Schools Budget	167,086	167,086	0	
1.0.9	Under 5s in Private/voluntary/independent settings	3,598	3,598	0	
1.0.10	Central expenditure on education of children under 5s	3,048	2,181	-867	Contribution from Sure Start Grant
1.1.2	School-specific contingencies	2,309	3,879	1570	SEN carry forward and bulge class pressure offset by savings created by grant substitution
1.1.3	Early Years contingency	530	480	-50	Reduction in expected numbers
1.2.1	Provision for pupils with SEN (including assigned resources)	1,897	1,862	-35	Contribution from Sure Start Grant
1.2.2	Provision for pupils with SEN, provision not included in line 1.2.1	1,762	1,762	0	
1.2.3	Support for inclusion	36	36	0	
1.2.4	Fees for pupils at independent special schools	4,369	4,119	-250	Contingency set aside for in year new cases expected now not to be used
1.2.6	Fees to independent schools for pupils without SEN	0	0	0	
1.2.7	Inter-authority recoupment	2,676	2,476	-200	Invoices accrued for now not expected
1.3.1	Pupil Referral Units	3,305	3,305	0	
1.3.2	Behaviour Support Services	1,327	1,327	0	
1.3.3	Education out of school	1,346	1,346	0	
1.3.4	14 - 16 More practical learning options	619	619	0	
1.4.2	Free school meals - eligibility	96	96	0	
1.5.1	Insurance	0	0	0	
1.5.2	Museum and Library Services	0	0	0	
1.5.3	School admissions	473	458	-15	Contribution from Sure Start Grant
1.5.4	Licences/subscriptions	143	143	0	
1.5.5	Miscellaneous (not more than 0.1% total of net SB)	189	189	0	
1.5.6	Servicing of schools forums	70	70	0	
1.5.7	Staff costs - supply cover (not sickness)	844	844	0	
1.5.8	Supply cover - long term sickness	0	0	0	
1.5.9	Termination of employment costs	160	160	0	
1.7.1	Capital Expenditure from Revenue (CERA) (Schools)	2,498	2,498	0	
		198,381	198,534	153	

Funding of Academies

1. Purpose of the Report

At the last meeting of the Forum we looked at the way funding would operate for Academies mainly from a local authority perspective. This report updates members on the latest known position on the funding of academies. It looks at both the impact on Local Authority and the impact on schools that become academies.

2. Recommendation

- i) The Forum note the report.

3. Background

- 3.1 The principle of academies' funding is that academies should receive the same level of per-pupil funding as they would receive from the local authority as a maintained school. In addition, they will receive top-up funding to meet additional responsibilities that are no longer provided for them by the local authority. This is over and above the funding currently given to Academies
- 3.2 In theory the Government believe that becoming an academy should not bring about a financial advantage or disadvantage to a school.
- 3.3 Unlike maintained schools that are funded on the traditional financial year basis (April to March), Academies are funded from September to August to reflect the academic year.
- 3.4 The funding for academies is through a grant called the General Annual Grant (GAG), paid by the Young People's Learning Agency (YPLA).

The GAG is made up of three different elements as follows

- 3.5 An amount equivalent to the school's current budget share

This will be the same as the school's current budget share received from the local authority. An adjustment is made to reflect any reduced business rates, paid by an academy as a charitable trust, and for insurance, which is paid separately in GAG.

- 3.6 Local authority central spend equivalent grant (LACSEG) - DSG

This is the additional money to cover those central services that form part of the Dedicated Schools Grant but will no longer be provided when a school becomes an Academy.

This element of grant is calculated by using a formula, based on an academy's pupil numbers and the amount that the relevant local authority spends on the services and costs. It is not based on the actual costs of the services supplied to the individual school. The headings included in the formula are shown in Appendix B.

3.7 Expenditure funded out of the General Fund (LACSEG)

Further costs are now proposed to be taken from the Local Authority over and above the Dedicated Schools Grant. These services are funded through the General Fund. In the past the sums involved were small and the DFE did not recoup costs, as the number of academies are expect to grow the DFE now propose to recoup these costs

3.8 The DfE will be consulting formally on academies funding for 2012/13 onwards, when Ministers have considered the results of consultation on school funding discussed under item 3 of this agenda, which opened in July. The DFE, agree there will need to be congruence between proposals for academies and other schools. They have no precise timescale for this but have set up an academy funding review group which will inform the basis of consultation

3.9 The DFE agree that for 2011/12 the decisions on some issues (eg the basis of calculating budget shares) will be needed in early October and will take them in the light academy review group's advice. On some other 2011/12 issues (eg the methodology and recovery mechanism for LACSEG) the decision will be a bit later (probably November) as it will depend on the spending review.

4. Impact on Schools

The calculation of funding that a typical school will receive if it becomes an academy is attached in Appendix A.

The tasks/costs an academy have to take on that a maintained school currently do not undertake as they are either undertaken by the Local Authority or are not necessary are shown below.

Actuarial Valuation Of Pension Obligations	Union Negotiations	School Improvement
Increased Pension Liability	CRB Check Follow-up Interviews	Education Welfare Services
Preparation Of Company Accounts	Occupational Health	Educational Psychologists
Audit Of Company	Maternity Cover	Behaviour Support

Accounts		Services
Appropriate Finance Package	Interpretation Of Changes In Legislation	Specialist SEN Teachers
VAT Accounting	Statutory Returns e.g. Personnel, Attainment & Estates Management	SEN Outreach
Directors Insurance	Performance Management Data	SEN Tribunals
Internal Audit	Responding to allegations against the school and staff	Outdoor Education
Enhanced Contingency As Licensed Deficit Not Possible	Redundancy Costs, Compromise Agreements & Enhance Pensions	Music Services
Enhancements To Administration Staff	Free School Meal Eligibility	School Milk
Procurement e.g. Energy & Catering	Management Of Capital Programmes	Licences e.g Performing Rights Society
Fire Assessments	Asbestos Checks	

5. Impact on Local Authorities

- 5.1 The calculation of how the recoupment operates is shown in Appendix B.
- 5.2 The funding that a local authority loses and comments about their appropriateness are found in Appendix C. This is a collection of comments from other London Borough's.
- 5.3 If all schools in Lewisham became academies we would lose from the Dedicated Schools Grant £6m and a further £12m from the General Fund. This would leave within the DSG a sum of £23m (this is broken down below) , although if all schools became academies the DFE would probably look at different arrangements for the Local Authority.

The main headings left are	£m
Special Educational Needs	10.3
Early Years	7.1
Admissions	0.5
CERA	2.5
Contingency	2.3
Practical Learning	1.1

- 5.4 The basis for calculating LACSEG funding for academies and funding to be recouped from local authorities is summarised below
- Where services are **targeted** towards particular groups/types of need (such as children with free meals), this **should be reflected** in the methodology for calculating LACSEG funding for academies and the funding to be recouped from local authorities.
 - Where calculations (of LACSEG funding for academies and funding recouped from local authorities) are done on the basis of pupil numbers a **consistent and appropriate definition of pupil numbers** needs to be used.
 - The amount of LACSEG funding that academies are entitled to and the amount of funding to be recouped from local authorities needs to be calculated on **net basis** (ie net of income) rather than on a gross basis.
 - Local authorities need the **ability to amend section 251 statements** to ensure that they represent a true reflection of their spending, and that a fair and appropriate amount of funding is recouped from local authorities.

Dave Richards

Group Finance Manager – Children and Young People

Contact on 0208 3149 442 or by e-mail at Dave.Richards@Lewisham.gov.uk

Please input values in the green cells only

School Information		
Local Authority Number	<input type="text" value="209"/>	
Local Authority Name	<input type="text" value="Lewisham"/>	
School Phase	<input type="text" value="Primary"/>	
Number of pupils - full-time equivalents (FTEs)		
Primary (include nursery if applicable)	<input type="text" value="400"/>	
Number of School Action and School Action Plus pupils (FTEs)		
Primary (include nursery if applicable)	<input type="text" value="100"/>	
Equivalent annual funding for financial year 2010-11		
2010-11 School Budget Share	<input type="text" value="£1,900,000"/>	
Individually Assigned SEN Resources (IAR)	<input type="text" value="£50,000"/>	
Insurance	<input type="text" value="£11,362"/>	
Rates	<input type="text" value="£14,756"/>	
School Budget Share minus Rates, Insurance and IAR	<input type="text" value="£1,823,882"/>	
Relevant central services	<input type="text" value="£225,200"/>	
VAT	<input type="text" value="£84,537"/>	
Total	<input type="text" value="£2,133,619"/>	

Notes

This is a three digit number, which you will be able to obtain from your local authority. Once entered, the "Local Authority Name" box will be populated with the relevant local authority name.

If your school is primary or a secondary then please select the relevant option. If your school has a primary and secondary phase then select "All Phase". If your school is a middle school then select "Secondary".

Please give the pupil number full-time equivalent (FTE) figures from the latest January school census return. These figures may have subsequently been adjusted in discussion with your local authority. Give the pupil number figures that have been agreed with your local authority, and which will have formed the basis of the School Budget Share amount given below.

Please input the number of full-time equivalent (FTE) figures from the latest January school census return for pupils at school action and school action plus. Pupils with statements of special educational needs should **not** be included.

Give your School Budget Share for the financial year 2010-11. This can be obtained from your local authority if you don't know the amount already. The figure you should use is the delegated formula funding which your school receives from the local authority, and which forms most (but not all) of your school's annual budget. Do not include any separate grants for specific purposes such as School Standards Grant(SSG), SSG(Personalisation) or Standards Fund. For a school that becomes an academy, these grants will continue to be paid at the same rate by the local authority for the rest of the financial year.

Give here the resources allocated directly by the local authority for named pupils with high cost special educational needs (SEN) if included in the budget share as shown on Table 3 of s.251 budget statement.

If premises and liability insurance costs are included in the School Budget Share and identified separately, put the amount here.

Give here the amount of business rates actually paid for 2010-11. The school will be reimbursed for the actual costs, which may reduce if the school becomes an academy.

Rates and insurance costs are not included in this element of the calculation as the actual costs will be taken into account in the final grant amount. IAR is not included as the LA will continue direct payments

This is the school's share, based on its pupil numbers, of the funding which the local authority uses for its central costs and services for schools.

An academy receives an element of its grant to cover the additional costs of VAT (because it cannot reclaim VAT like a maintained school can), and can apply for extra if this does not cover the whole cost.

You can use this total to compare, on a financial year basis, the level of your funding as a school, and the level of funding you would receive as an academy. But be aware that the actual grant you would receive as an academy would be different as it would be for the academic year September to August, and there are other adjustments as well. Also, you should remember that you will have to pay for any costs and services that your local authority currently provides centrally.

Academies Funding - section 251 headings to be taken

Appendix B

S251 Ref	Heading	TO BE GIVEN TO ACADEMIES		2011/12	2011/12	Primary Element		Rate	
				S251 Net budget	S251 Gross budget on selected Headings	2010/11	Pupils	2009/10	2010/11
				£	£	£		£	£
1.0.1	Individual Schools Budget	N		167,086,362					
1.0.2	School Standards Grant - Maintained Schools	N		0					
1.0.6	School Development Grant	N		0					
1.0.7	Other Standards Fund Allocation - Devolved	N		0					
1.0.8	Threshold and Performance Pay (Devolved)	N		0					
1.0.9	Expenditure for Education of Children under 5s in	N		3,598,089					
1.0.10				3,048,441					
1.1.1	Support for schools in financial difficulty	N		0					
1.1.2	School-specific contingencies	N		2,309,216					
1.1.3				529,951					
1.2.1	Provision for pupils with SEN (including assigned resources)	N		1,896,845					
1.2.2	Provision for pupils with SEN, provision not included in line 1.2.1	Y	Gross	1,761,704	1,766,204	892,788	sa/sap	4,769	177 187
1.2.3	Support for inclusion	N		35,876					
1.2.4	Fees for pupils at independent special schools & abroad	N		4,368,758					
1.2.5	SEN transport	N		0					
1.2.6	Fees to independent schools for pupils without SEN	N		0					
1.2.7	Inter-authority recoupment	N		2,676,284					
1.2.8	Contribution to combined budgets	N		0					
1.3.1	Pupil Referral Units	N		3,305,178					
1.3.2	Behaviour Support Services	Y	Gross	1,326,998	1,326,998	842,868	Pupils	20,454	42 41
1.3.3	Education out of school	N		1,346,318					
1.3.4	14 - 16 More practical learning options	Y	Gross	618,980	1,146,916	0			
1.3.5	Central expenditure on education of children under 5s	N		0					
1.4.1	School Meals - nursery, primary and special schools	Y	Net	0		0		20,454	0 0
1.4.2	Free school meals - eligibility	Y	Gross	96,120	96,120	67,668		20,454	3 3
1.4.3	Milk	Y	Net	0		0		20,454	0 0
1.4.4	School kitchens - repair and maintenance	Y	Gross	0	0	0		20,454	0 0
1.5.1	Insurance	N		0					
1.5.2	Museum and Library Services	Y	Gross	0	0	0			
1.5.3	School admissions	Y	N/A	472,586					
1.5.4	Licences/subscriptions	Y	Gross	142,804	142,804	98,013		20,454	6 5
1.5.5	Miscellaneous (not more than 0.1% total of net SB)	Y	Gross	189,209	189,209	91,298		20,454	6 4
1.5.6	Servicing of schools forums	N		69,928					
1.5.7	Staff costs - supply cover (not sickness)	Y	Gross	843,932	843,932	566,090		20,454	28 28
1.5.8	Supply cover - long term sickness	Y	Gross	0	0	0		20,454	0 0
1.5.9	Termination of employment costs	Y	Gross	160,042	160,042	107,352		20,454	6 5
1.6.1	School Development Grant - Non-Devolved	Y	Gross	0	0	0		20,454	2 0
1.6.2	Other Standards Fund Allocation - Non-Devolved	Y	Gross	0	733,687	593,936		20,454	55 29
1.6.3	Other Specific Grants	Y	Gross	0	38,050	3,303		20,454	0 0
1.6.4	Performance Reward Grant	Y	Gross	0	0	0		20,454	0 0
1.7.1	Capital Expenditure from Revenue (CERA) (Schools)	N		2,498,414					
1.7.2	Prudential borrowing costs	N		0					
1.8.1	TOTAL SCHOOLS BUDGET (Dedicated Schools Grant)			198,382,035		3,263,317			148 115
2	OTHER EDUCATION AND COMMUNITY BUDGET								
	SPECIAL EDUCATION								
2.0.1	Educational Psychology Service	N		713,377					
2.0.2	SEN administration, assessment and co-ordination	N		543,087					
2.0.3	Therapies and other health related services	Y	Gross	0	0	0			
2.0.4	Parent partnership, guidance and information	N		91,218					
2.0.5	Monitoring of SEN provision	N		79,429					
2.0.6	Total Special Education			1,427,111					
	Learner Support								
2.1.1	Excluded pupils	N		12,474					
2.1.2	Pupil support	Y	Gross	155,602	155,602	44,368		20,454	3 2
2.1.3	Home to school transport: SEN transport expenditure	N		2,967,250					
2.1.4	Home to school transport: other home to school transport expenditure	N		441					
2.1.5	Home to college transport: SEN transport expenditure	N		172,658					
2.1.7	Home to college transport: other home to college transport expenditure	N		453					
2.1.8	Education Welfare Service	Y	Gross	996,626	996,626	996,626		30,635	37 33
2.1.9	School improvement	Y	Gross	3,211,826	3,598,537	3,598,537		30,635	135 117
2.1.9	Total Learner Support			7,517,330					
	ACCESS								
2.2.1	Asset management - education	Y	Net	1,386,286		1,386,286		30,635	48 45
2.2.2	Supply of school places	N		0					
2.2.3	Music services (not Standards Fund supported)	Y	Net	103,300		103,300		30,635	7 3
2.2.4	Visual and performing arts (other than music)	Y	Net	0		0		30,635	0 0
2.2.5	Outdoor Education including Environmental and Field Studies (not sports)	Y	Net	152,576		152,576		30,635	6 5
2.3.2	Total Access			1,642,162					
6	Local Authority Education Functions								
7.0.1	Statutory / Regulatory Duties	Y	Net	1,888,689		1,888,689		30,635	79 62
7.0.2	Premature retirement costs / Redundancy costs	Y	Gross	846,825	846,825	846,825		30,635	29 28
7.0.3	Existing Early Retirement Costs (commitments entered into by 31/3/99)	N		132,856					
7.0.4	Residual pension liability (e.g. FE, Careers Service, etc.)	N		1,349,900					
7.0.5	Joint use arrangements	N		0					
7.0.6	Insurance	N		0					
7.0.7	Monitoring national curriculum assessment	Y	Gross	32,287	32,287	32,287		30,635	1 1
6.0.8	Total Local Authority Education Functions			4,250,557					
	Specific Grants and Specific Formula Grants								
7.1.1	School Development Grant - non-devolved	Y	Gross	0	0	0		30,635	0 0
7.1.2	Other Standards Fund Allocation - non-devolved	Y	Gross	0	834,404	834,404		30,635	0 27
7.1.3	Other Specific Grant	N		0					
6.1.4	Total Specific Grants			0					
	Total LA BLOCK (General Fund0)			14,837,160		9,883,897			345 323

TABLE 1: FUNDING PERIOD 3 (2010

Children, Schools and Families Financial Data Collection

Table 1 - Local Authority Information

Year	2010-11	Local Authority Name	Lewisham	Local Authority Number	209	Email Address	hayden.judd@lewisham.gov.uk
Contact	Hayden Judd	Tel No.	020 8314 8350	Version No.	5	Completion Date	20/08/2010

1 SCHOOLS BUDGET	Early Years (a)	Primary (b)	Secondary (c)	Special (d)	Gross (e)	Income (f)	Net (g)
1.0.1 Individual Schools Budget	1,320,161	94,913,750	58,035,972	12,816,479	167,086,362		167,086,362
1.0.2 School Standards Grant - Maintained Scho	46,037	3,452,134	1,562,832	256,257	5,317,260	5,317,260	0
1.0.3 School Standards Grant - Pupil Referral Ur	0	0	31,200	0	31,200	31,200	0
1.0.4 School Standards Grant (Personalisation) -		819,138	1,300,056	34,152	2,153,346	2,153,346	0
1.0.5 School Standards Grant (Personalisation) -		0	1,809	0	1,809	1,809	0
1.0.6 School Development Grant	48,907	4,804,146	6,379,066	328,899	11,561,018	11,561,018	0
1.0.7 Other Standards Fund Allocation - Devolve	326,934	6,839,593	1,789,789	86,537	9,042,853	9,042,853	0
1.0.8 Threshold and Performance Pay (Devolvec	0	0	0	0	0		0
1.0.9 Expenditure on the Free Entitlement in PVI providers (fun	4,083,090				4,083,090	485,001	3,598,089
1.0.10 Central expenditure on education of	3,992,400	0	0	0	3,992,400	943,959	3,048,441
1.1.1 Support for schools in financial difficulty	0	0	0	0	0	0	0
1.1.2 School-specific contingencies	2,214	1,587,767	711,567	7,669	2,309,216	0	2,309,216
1.1.3 Early Years contingency	278,900	251,051	0	0	529,951	0	529,951
1.2.1 Provision for pupils with SEN (including ass	141,919	876,491	878,435	0	1,896,845	0	1,896,845
1.2.2 Provision for pupils with SEN: provision not	276,205	892,788	384,165	213,046	1,766,204	4,500	1,761,704
1.2.3 Support for inclusion	0	25,113	10,763	0	35,876	0	35,876
1.2.4 Fees for pupils with SEN at independent sp	0	0	0	4,368,758	4,368,758	0	4,368,758
1.2.5 SEN transport	0	0	0	0	0	0	0
1.2.6 Fees to independent schools for pupils with	0	0	0	0	0	0	0
1.2.7 Inter-authority recoupment	400	1,212,715	548,128	2,044,973	3,806,216	1,129,932	2,676,284
1.2.8 Contribution to combined budgets	0	0	0	0	0	0	0
1.3.1 Pupil Referral Units	0	0	3,369,268	0	3,369,268	64,090	3,305,178
1.3.2 Behaviour Support Services	0	842,868	484,130	0	1,326,998	0	1,326,998
1.3.3 Education out of school	6,911	836,061	362,383	140,962	1,346,318	0	1,346,318
1.3.4 14 - 16 More practical learning options			1,117,442	29,474	1,146,916	527,936	618,980
1.4.1 School Meals - nursery, primary and speci	0	0		0	0	0	0
1.4.2 Free school meals - eligibility	0	67,668	28,452	0	96,120	0	96,120
1.4.3 Milk	495	59,111		0	59,606	59,606	0
1.4.4 School kitchens - repair and maintenance	0	0		0	0	0	0

1.5.1 Insurance	0	0	0	0	0	0	0
1.5.2 Museum and Library Services	0	0	0	0	0	0	0
1.5.3 School admissions	0	326,156	146,431	0	472,586	0	472,586
1.5.4 Licences/subscriptions	804	98,013	41,202	2,785	142,804	0	142,804
1.5.5 Miscellaneous (not more than 0.1% total of	749	91,298	94,568	2,594	189,209	0	189,209
1.5.6 Servicing of schools forums	393	46,906	21,419	1,210	69,928	0	69,928
1.5.7 Staff costs - supply cover (not sickness)	4,743	566,090	258,504	14,595	843,932	0	843,932
1.5.8 Supply cover - long term sickness	0	0	0	0	0	0	0
1.5.9 Termination of employment costs	900	107,352	49,022	2,768	160,042	0	160,042
1.6.1 School Development Grant - Non-Develoc	0	0	0	0	0	0	0
1.6.2 Other Standards Fund Allocation - Non-De	3,047	593,936	130,625	6,079	733,687	733,687	0
1.6.3 Other Specific Grants	4,215	3,303	27,405	3,127	38,050	38,050	0
1.6.4 Performance Reward Grant	0	0	0	0	0		0
1.7.1 Capital Expenditure from Revenue (CERA)	14,041	1,673,517	767,983	42,873	2,498,414	0	2,498,414
1.7.2 Prudential borrowing costs	0	0	0	0	0	0	0
1.8.1 TOTAL SCHOOLS BUDGET	10,553,463	120,986,967	78,532,616	20,403,236	230,476,282	32,094,247	198,382,035

2 OTHER EDUCATION AND COMMUNITY BUDGET

SPECIAL EDUCATION

2.0.1 Educational Psychology Service					713,377	0	713,377
2.0.2 SEN administration, assessment and co-ordination					543,087	0	543,087
2.0.3 Therapies and other health related services					0	0	0
2.0.4 Parent partnership, guidance and information					91,218	0	91,218
2.0.5 Monitoring of SEN provision					79,429	0	79,429
2.0.6 Total Special Education					1,427,111	0	1,427,111

Learner Support

2.1.1 Excluded pupils					12,474	0	12,474
2.1.2 Pupil support	0	44,368	111,234	0	155,602	0	155,602
2.1.3 Home to school transport: SEN transport expenditure	16,677	1,990,362	908,895	51,315	2,967,250	0	2,967,250
2.1.4 Home to school transport: other home to school transport	0	0	441	0	441	0	441
2.1.5 Home to post-16 provision transport: SEN/ LLDD transport expenditure (aged 16-18)					172,658	0	172,658
2.1.6 Home to post-16 provision transport: SEN/ LLDD transport expenditure (aged 19-25)					0	0	0
2.1.7 Home to post-16 provision transport: other home to post - 16 transport expenditure					453	0	453
2.1.8 Education Welfare Service					996,626	0	996,626
2.1.9 School improvement					3,598,537	386,711	3,211,826
2.1.10 Total Learner Support					7,904,042	386,711	7,517,331

ACCESS

2.2.1 Asset management - education					1,386,286	0	1,386,286
2.2.2 Supply of school places					0	0	0
2.2.3 Music services (not Standards Fund supported)					103,300	0	103,300
2.2.4 Visual and performing arts (other than music)					0	0	0
2.2.5 Outdoor Education including Environmental and Field Studies (not sports)					152,576	0	152,576
2.2.6 Total Access					1,642,162	0	1,642,162

3 YOUNG PEOPLE'S LEARNING AND DEV

3.0.1 16 - 18 Further education	0	0	26,635,848	26,635,848	0
3.0.2 16 - 18 Provision other than schools and FE	0	0	0	0	0
3.0.3 14 - 19 Reform	0	0	193,910	163,386	30,524
3.0.4 Total Young people's learning and development	0	0	26,829,758	26,799,234	30,524
3.1.1 Capital Expenditure from Revenue (CER)	0	0	0	0	0
Services for young people					
3.2.1 Positive activities for young people			1,963,006	1,963,006	0
3.2.2 Youth Work			3,167,115	275,500	2,891,615
3.2.3 Connexions			2,599,051	0	2,599,051
3.2.4 Discretionary Awards			10,347	0	10,347
3.2.5 Student Support under new Arrangements and Mandatory Awards			297,319	0	297,319
3.2.6 Total Services for young people			8,036,838	2,238,506	5,798,332
3.3.1 Capital Expenditure from Revenue (CERA) (Services for young people)			0	0	0
4 Adult and Community					
4.0.1 Adult and Community learning			5,122,039	4,513,667	608,372
4.0.2 Total Adult and Community Learning			5,122,039	4,513,667	608,372
4.1.1 Capital Expenditure from Revenue (CERA) (Adult & Community)			0	0	0
5 YOUTH JUSTICE					
5.0.1 Secure accommodation (youth justice)			541,385	0	541,385
5.0.2 Youth Offender Teams			3,917,128	2,221,898	1,695,230
5.0.3 Other Youth Justice Services			0	0	0
5.0.4 Total Youth Justice			4,458,513	2,221,898	2,236,615
6 CHILDREN'S AND YOUNG PEOPLE'S SERVICES					
Children Looked After					
6.0.1 Residential care			7,995,686	973,886	7,021,800
6.0.2 Fostering services			16,968,617	3,961,387	13,007,230
6.0.3 Other children looked after services			4,386,860	200,000	4,186,860
6.0.4 Secure accommodation (welfare)			99,000	0	99,000
6.0.5 Short breaks (respite) for looked after disabled children			396,250	0	396,250
6.0.6 Children placed with family and friends			411,700	0	411,700
6.0.7 Advocacy services for children looked after			95,000	0	95,000
6.0.8 Education of looked after children	0	0	0	0	0
6.0.9 Leaving care support services			1,353,600	0	1,353,600
6.0.10 Asylum seeker services - children			631,350	330,000	301,350
6.0.11 Unaccompanied asylum children: assessment and case management			877,120	736,479	140,641
6.0.12 Unaccompanied asylum children: accommodation			0	0	0
6.0.13 Total Children Looked After			33,215,183	6,201,752	27,013,431
Children and Young People's Safety					
6.1.1 Child death review processes			91,800	0	91,800
6.1.2 Preventative services (formerly the children's fund)			858,891	0	858,891

6.1.3 LA functions in relation to child protection	1,424,948	0	1,424,948
6.1.4 Local safeguarding childrens board	149,300	56,100	93,200
6.1.5 Total Children and Young People's Safety	2,524,939	56,100	2,468,839
Family Support Services			
6.2.1 Direct payments	364,500	0	364,500
6.2.2 Short breaks (respite) for disabled children	550,450	124,200	426,250
6.2.3 Home care services	679,600	77,520	602,080
6.2.4 Equipment and adaptations	57,000	0	57,000
6.2.5 Other family support services	3,285,725	928,500	2,357,225
6.2.6 Substance misuse services (Drugs, Alcohol and Volatile substances)	474,096	473,466	630
6.2.7 Contribution to health care of individual children	218,193	74,750	143,443
6.2.8 Teenage pregnancy services	372,307	29,000	343,307
6.2.9 Total Family Support Services	6,001,871	1,707,436	4,294,435
Other Children's and Families Services			
6.3.1 Adoption services	1,843,425	52,972	1,790,453
6.3.2 Special guardianship support	253,447	0	253,447
6.3.3 Other children's and families services	289,583	0	289,583
6.3.4 Total Other Children's and Families Services	2,386,455	52,972	2,333,483
Children's Services Strategy			
6.4.1 Children's and young people's plan	0	0	0
6.4.2 Partnership costs	0	0	0
6.4.3 Central commissioning function	401,372	0	401,372
6.4.4 Commissioning and social work	11,948,164	920,600	11,027,564
6.4.5 Total Children's Services Strategy	12,349,536	920,600	11,428,936
6.5.1 Capital Expenditure from Revenue (CERA) (Children's and young people's services)	0	0	0
7 Local Authority Education Functions			
7.0.1 Statutory / Regulatory Duties	1,896,950	8,261	1,888,689
7.0.2 Premature retirement costs / Redundancy costs	846,825	0	846,825
7.0.3 Existing Early Retirement Costs (commitments entered	132,856	0	132,856
7.0.4 Residual pension liability (e.g. FE, Careers Service, etc.)	1,349,900	0	1,349,900
7.0.5 Joint use arrangements	0	0	0
7.0.6 Insurance	0	0	0
7.0.7 Monitoring national curriculum assessment	32,287	0	32,287
7.0.8 Total Local Authority Education Functions	4,258,817	8,261	4,250,556
Specific Grants			
7.1.1 School Development Grant - non-devolved	0	0	0
7.1.2 Other Standards Fund Allocation - non-dev	834,404	834,404	0
7.1.3 Other Specific Grant	11,318,823	11,318,823	0
7.1.4 Total Specific Grants	12,153,227	12,153,227	0
7.2.1 Capital Expenditure from Revenue (CERA) (LA Education Functions)	13,366,741	11,838,317	1,528,424

8.1.1 Total Schools Budget, Special Education, Learner Support, Access, Young					281,438,231	66,032,365	215,405,866
8.1.2 Total Youth Justice, Children and Young People's Services Budget (including					60,936,497	11,160,758	49,775,739
8.1.3 Total LA Education Functions Budget (Including CERA) plus (Lines 7.0.8 + 7.1.4 + 7.2.1)					29,778,785	23,999,805	5,778,981
9 Total Education, Young People's Learning and Development, Services for Young					372,153,513	101,192,928	270,960,585
10 Capital Expenditure (excluding CERA)	25,262	33,605,545	4,897,322	79,219	38,607,349	14,543,127	24,064,222
MEMORANDUM ITEMS							
11 Expenditure covered by YPLA Grant - Include below the part of the expenditure recorded in							
11a.1 SIXTH FORM - YPLA allocation for 16+ funding for secondary schools (included in		8,741,619			8,741,619	8,741,619	0
11a.2 SIXTH FORM - YPLA allocation for 16+ funding for special schools			407,595		407,595	407,595	0
11b.1 SIXTH FORM – Element included at lines 1.2.1 and 1.2.2 above for	0		0		0	0	0
11b.2 SIXTH FORM – Element included at 1.2.4 above for pupils at independent special	0		756,962		756,962	756,962	0
11b.3 SIXTH FORM – Element included at 1.2.6 above for pupils at independent schools (without S	0		0		0	0	0
11c.1 YPLA Threshold and Performance Pay Costs (included in expenditure a	0		0		0	0	0
11c.2 YPLA Threshold and Performance Pay Costs (included in expenditure a	0		0		0	0	0
12 Expenditure on Positive activities for young people							
12a.1 Positive Activities controlled or shaped by young people - element included at line 3.2.1 above					227,544	227,544	0
12a.2 Positive Activities for young people on Friday and Saturday nights - element included at line 3.2.1 above					759,560	759,560	0

Academy Funding

SUMMARY OF RESPONSES ON INDIVIDUAL SECTION 251 LINE ITEMS

Item		Recoupment from LAs				LACSEG funding for academies
Line	Description	Shouldn't be recouped	Okay to recoup but NOT on the basis of pupil numbers	Okay to recoup	Rationale for position on recoupment	Position and rationale for extent to which academies should receive LACSEG funding
Schools Budget						
1.2.2	Provision for pupils with SEN, provision not included in line 1.2.1 (NB apportioned on basis of no. of pupils with School Action or School Action Plus)	✓?			LAs have a statutory responsibility for SEN including SEN statementing which remains even when more schools become academies. No satisfactory proxy measures by which to recoup funding from LAs. Some LAs include funding for early years provision in PVIs in this line (?).	Academies shouldn't receive funding for statutory responsibilities of LAs.
1.3.2	Behaviour Support Services		✓		Recouping on basis of pupil numbers doesn't take into account need. Pupil number measure doesn't even take into account pupils in PRUs/alternative provision.	Funding should be allocated on basis of need.
1.3.4	14 - 16 More practical learning options		✓		Recouping on basis of pupil numbers doesn't take into account need.	Funding should be allocated on basis of need.
1.4.1	School Meals - nursery, primary and special schools			✓?	Function already delegated to schools so no spend in this line (?).	
1.4.2	Free school meals - eligibility		✓?		Funding should be calculated using FSM numbers not pupil numbers (?).	Should be funded on basis of FSM numbers rather than pupil numbers.
1.4.3	Milk		✓		Recouping on basis of pupil numbers doesn't take into account need.	Funding should be allocated on basis of need.
1.4.4	School kitchens - repair and maintenance			✓?	Function usually (?) delegated to schools so no spend in this line.	
1.5.2	Museum and Library Services	?	?	?		
1.5.3*	School admissions	✓			Statutory role of coordination on LAs that doesn't transfer to academies.	The basis for the current flat rate of funding for academies is not clear.
1.5.4	Licences/subscriptions		✓		Amount to be recouped needs to be determined on a case by case basis depending on what licences & subscriptions are for.	
1.5.5	Miscellaneous (not more than 0.1% total of net SB)		✓		Amount to be recouped needs to be determined on a case by case basis depending on what is included in this line. Some authorities include more in this line than others.	Amount of funding needs to be determined on a case by case basis depending on what is included in this line.
1.5.7	Staff costs - supply cover (not sickness)		✓?		Funds trade union activities that all schools benefit from (?). Actual spend varies each year between sectors.	
1.5.8	Supply cover - long term sickness			✓	Function usually (?) delegated to schools so no spend in this line.	
1.5.9	Termination of employment costs	✓?			Costs fall unevenly between schools each year so makes sense for LAs to manage spend.	

1.6.1	School Development Grant - Non-Devolved	?	?	?		
1.6.2	Other Standards Fund Allocation - Non-Devolved			✓?	Okay to recoup on pupil number basis (?). Some LAs devolve this spending/don't have any spending in this line.	
1.6.3	Other Specific Grants	?	?	?		
1.6.4	Performance Reward Grant			✓?	Okay to recoup on pupil number basis (?).	
Other Education and Community Budget						
2.0.3*	Therapies & other health related services		✓?		Related to SEN spend (?). Recouping on basis of pupil numbers doesn't take into account need.	Funding should be allocated on basis of need.
2.1.2*	Pupil support	?	?	?		
2.1.7*	Education Welfare Service		✓?		LAs retain some statutory responsibilities. Recouping on basis of pupil numbers doesn't take into account need.	Funding should take account of statutory responsibilities plus pupil need.
2.1.8*	School improvement		✓		Recouping on basis of pupil numbers doesn't take into account need.	Funding should be allocated on basis of need.
2.2.1*	Asset management - education	✓?			LA has statutory role (?).	
2.2.3*	Music services (not Standards Fund supported)		✓?		There is a fixed component that LAs must meet (?).	
2.2.4*	Visual and performing arts (other than music)		✓?		There is a fixed component that LAs must meet (?).	
2.3.1*	Outdoor Education including Environmental and Field Studies (not sports)		✓?		There is a fixed component that LAs must meet (?).	
6.0.1*	Statutory/Regulatory Duties	✓?			LA has statutory role that doesn't diminish as more schools become academies.	Academies shouldn't receive funding for statutory responsibilities of LAs.
6.0.2*	Premature retirement costs/Redundancy costs	✓?			LA responsibilities that don't transfer to academies. Not a budget for each individual school. In some (?) LAs only relate to LA staff (school component included in school budget).	Academies shouldn't receive funding for LA responsibilities or for items that don't relate to the particular school.
6.0.7*	Monitoring national curriculum assessment	✓?			LA responsibility that doesn't diminish as more schools become academies.	
6.1.1*	School Development Grant - non-devolved	?	?	?		
6.1.2*	Other Standards Fund Allocation - non-devolved			✓?	Okay to recoup on pupil number basis (?).	

* Not currently recouped from LAs

Fraudulent standing orders

1. Purpose of the Report

The report is to provide members with an update regarding the fraudulent standing orders that had been set up on teachers bank accounts

2. Recommendation

- i) The Forum note the current position
- ii) The Forum ask for a further update when the investigation is complete

3. Investigation update for Schools Forum

- 3.1 The Special Investigation section of the Council's Anti-Fraud & Corruption Team (A-FACT) is in the process of conducting a criminal investigation into the fraudulent use of a number of employees bank details. The Police are also conducting their own enquires. Both investigations are ongoing.
- 3.2 A-FACT have received only one report of an attempted fraud in the last month, involving an employee's bank account, but would encourage employees to remain vigilant and to check their bank statements thoroughly.
- 3.3 A-FACT are reviewing all the systems involved in the processing of employee's personal data. The evidence arising from this investigation so far has been analysed and in our opinion it would appear highly unlikely that the data held within the Payroll team has been compromised.
- 3.4 A-FACT are satisfied that employees payroll data is held in a secure environment and there is no valid reason for employees withholding their personal bank details from Payroll.
- 3.5 We are hoping to bring this investigation to a conclusion shortly and will be issuing a further briefing at that time.

Carol Owen

Anti-Fraud & Corruption Team Manager

Innovation Fund

1. Purpose of the Report

The report is to provide members with an update about the operation of the Innovation Fund and seeks way to publicise the benefits of the fund

2. Recommendation

- i) The Forum note the report
- ii) Forum members promote the use of the fund at their collaborative meetings
- iii) An all schools letter is sent out by officers promoting the fund
- iv) An article appears in the next governors newsletter

3. Background

- 2.1 The Innovation Fund seeks to change how major projects are implemented by allowing schools to incur the expenditure when a need is identified, then paying for the asset created. At present schools 'save up' for special projects and the impact is to create a high level of balance overall. This is partly why we see such high carry forwards at certain schools.
- 2.2 Schools may only borrow from the LA this is because any borrowing by a school counts as borrowing by the LA, which is regulated by government i.e. schools may not borrow independently from banks.
- 2.3 The scheme is funded from the collective balances held by schools. All schools maintained by the LA are eligible to apply for a loan facility that can be for the:
 - Purchase or replacement of equipment including computer equipment;
 - Full or part funding of premises projects;
 - Energy and environmental improvements;
- 2.4 It is generally assumed that the loans will be for expenditure that is capital in nature and will have a life of at least of between two and five years. Equipment loans will normally be for a maximum period of three years. Only in exceptional cases will loans for equipment be extended to a maximum of five years.
- 2.5 The normal maximum loan will be up to 5% of the schools budget share, 2010/11 terms equates to £80,000 for an average primary school. However, subject to the three year forecast prepared by the

school, a loan in excess of this limit can be provided if the School can meet the ongoing commitment.

- 2.6** Interest charges will be calculated at bank interest rate + 1% on commencement and will be fixed for the term of the loan and repayments will be calculated on a monthly basis.
- 2.7** Loans to schools from the Innovation Fund will not exceed 20% of the collective balances held by schools. This would be permit loans up to £1.4m to be made.

3. Examples of use of the Innovation

- 3.1** Two schools have taken advantage of the scheme with one application pending and the projects carried out include:

Improvements to the Nursery and Reception Areas at Christ Church school - £12,000.

Contribution to the renovation and extension of the school's extended services building, Chelwood House - £17,076.

Upgrading of ICT system at John Ball estimated cost of project £58,000 - application pending.

Conclusion

- 5.1** The innovation fund is a method of bringing forward the purchase of large items of equipment for school. We have seen with the excess carry forwards balances that have been built up that the funding given for a pupil is not always spent but part of it goes into the schools contingency and results in the large carry forwards that we have seen. The pupil misses out on the opportunity to benefit from this funding. The innovation fund is a means to address this by allow the purchase to be brought forward and the sum normal set aside in the school contingency to be used to repay the loan.
- 5.3** With only two schools taking advantage of the fund it is important that we publicise the scheme to ensure that schools and governors are aware of the benefits described above. There are number of methods that can be employed and the following is suggested
- Letter to all schools and Chairman of Governors
 - Article in the Termly Governors newsletters
 - Schools Forum members share details of benefits of the fund at their collaborative meetings.
- 5.4** The innovation fund is available for all schools to make use of to their own benefit. Only two schools have taken advantage of the fund.

Currently there are few enquires about the fund and it important that schools and governors are aware of it's advantages.

Dave Richards

Group Finance Manager – Children and Young People

Contact on 0208 3149 442 or by e-mail at Dave.Richards@Lewisham.gov.uk