

Schools Forum Agenda

Thursday, 11 December 2014

4.30 pm – 6.30pm , Committee Room 1 - Civic Suite
Lewisham Town Hall
London SE6 4RU

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To consider the savings on the public health service and the likely cost impact on schools.	
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To consider the current budget monitoring position.	
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Information Item – Schools minor works programme

Dates of Future Meetings

5 February 2015
19 March 2015

All meetings 4.30 to 6.30

LEWISHAM SCHOOLS FORUM

Minutes of the meeting held on Thursday 25th September 2014

Membership (Quorum = 40% i.e. 9)

✓ = present

✗ = absent

		Attendance
Primary School Headteachers		
Primary School	VACANT	
Steve Davies	Coopers Lane	✓
Liz Booth	Dalmain	✗
Paul Moriarty	Good Shepherd	✗
Lisa Pearson	Torridon Infants	✗
Michael Roach	John Ball	✓
Nursery School Headteacher		
Nikki Oldhams	Chelwood	✓
Secondary School Headteachers		
Anne Potter	Addey & Stanhope	✓
Bob Ellis	Conisborough College	✓
David Sheppard	Leathersellers Federation	✓
Carolyn Unsted (Chair)	Sydenham	✓
Special School Headteacher		
Lynne Haines	Greenvale	✓
Pupil Referral Unit Headteacher		
Liz Jones	Abbey Manor	Apologies
Primary & Special School Governors		
Keith D'Wan	Athelney	Apologies
Dame Erica Pienaar	John Ball	✓
Mark Simons	Coopers Lane	✗
Secondary & Secondary Special School Governors		
Simon Nundy	Trinity	✗
James Pollard	Addey & Stanhope	✗
VACANT	Special School	
Academies		
Declan Jones	Haberdashers' Aske's	Apologies
16-19 Consortium Rep		
Theresa Williams	LeSoCo	✗
Early Years Rep		
Cathryn Kinsey	Clyde Nursery	✗
Diocesan Authorities		
Rev Richard Peers	Southwark Diocesan Board of Education	✗
Stephen Bryan	Education Commission	Apologies

Also Present	
Frankie Sulke	Executive Director
Alan Docksey	Head of Resources & Performance
Dave Richards	CYP Group Finance Manager
Diane Parkhouse	Schools-HR
Nicholas Sawyerr	Clerk
Martin Powell-Davis	Teachers Union
Martin O'Brien	Sustainable Resources Group Manager
Suzanne Wallis	Energy Efficiency Officer
Jane Miller	Deputy Director Public Health

Apologies for Absence

Apologies were received from Declan Jones, Stephen Bryan, Keith D'Wan & Liz Jones.

1. Minutes of Meeting held on 19th June 2014

The minutes were agreed and signed by the Chair.

2. Matters Arising

Schools Expansion Programme

AD informed the Forum that the DfE have published the draft School and Early Years Finance (England) Regulations 2014. The regulations are now in conflict to the plan proposed expansion at Greenvale. Alternative models of expansion at the schools are being considered.

Single Status Appeals

DP informed the forum that appeals were progressing through the various stages and the target date for completion is December 2014.

3. Energy Efficiency in Schools.

Members were updated with a report on carbon emissions data for 2013/14. The purpose of this data was to give an indication to schools of where energy waste was occurring so that this could be addressed. The data highlighted that new builds did not always improve energy efficiency. FS suggested that data on 2 PFI schools that were not captured for this report should be provided in future reports.

It was felt that it would be helpful if future reports could provide some examples of good practice.

A proposed spend of £2,750 to create a portal for schools to use to access energy management data was not approved.

4. Financial Update and Budget Monitoring Report

High Needs SEN

DR presented this item and informed members that High Needs SEN is forecast to overspend by £1,577k. The High Needs sub-group is considering the impact on next year's budget.

An under spend of £2m on two-year-olds was reported to members and it was agreed to utilise these funds to offset the shortfall.

Catering

DR informed members that procuring a contractor for school meals service for May 2015 is ongoing. To date 5 contractors have been shortlisted. Officers

would welcome head teachers and school business managers to participate in the evaluation exercise and asked for volunteers.

School Budget Plans.

Members were informed that all school budget plans have now been received.

Mutual Funds

Members were informed that PLFC and Gordonbrock schools have had rateable values revised and the bills have been back dated. The new bills are in excess of the original bills by £600k and £200k respectively. It is expected that other schools will have their rateable values revised.

It was agreed that the mutual funds under spend for last year (2013-14) should be used to cover the cost.

Contingency

The current regulations allow a contingency to be set aside to support good or outstanding secondary schools with falling rolls. It was agreed to set up such a fund next year and future bids by schools against the fund should be brought to the Forum.

Non-Sickness Supply Fund

It is forecast that 2014/15 budget will be fully utilised by year end.

Internal Audit Reports Outstanding Recommendations

The Forum noted the position on the outstanding audit recommendations and officers were asked to write to all Chairs of Governors about the issue. For all schools that have outstanding recommendations they should also be contacted directly.

5. Funding Reviews

Trade Union

Martin Powell-Davis felt that the time given to union reps to take part in trade union duties in Lewisham is reasonable and its current arrangements are working well across maintained schools in Lewisham. It was observed that over the past few years the cost per pupil of union support was reducing in real terms.

It was agreed that officers write to academies to see if they would wish to subscribe to a service level agreement for union time.

Lewisham schools support 3 union representatives on the National Executive. Frankie Sulkie was of the view that paying for Union National Executive's time by schools should be discouraged as this is a financial burden on schools for which they derive no direct benefit. Officers were asked to continue their discussion on the issue with the unions.

6. Financial Management in Schools

Judging the Standard of Financial Management in Schools

DR presented statistics on schools performance. The cumulative carry forward forecast for schools varied significantly from when the budget was set

(£7m) to final carry forward (£16m). There were concerns raised about school's skills in managing and monitoring budgets. The chair was particularly concerned about the late returns and members suggested the following to try and remedy the issue.

- Measures to be put in place to continuously monitor returns
- The need to involve Governors to help with returns by bringing it to their attention.

It was agreed to set up a Peer Review system on a trial basis

7. Council Budget Setting 2015 onwards

AD presented a report on the financial position of the council over the next three years. The overall savings for the next three years across the whole council was £95m.

Children and Young Peoples Directorate

The mayor is considering proposals to make savings in CYP of £9.6m. The current net budget (excluding the DSG) is £53m.

School Uniform Hardship Grant

The school uniform hardship grant is to be withdrawn. A draft letter to schools will be circulated to members for comments before being sent out. Members were concerned with cases where families were in extreme difficulties. It was proposed that school should deal with such issues if possible from their pupil premium funding.

Traded Services for Schools

The Mayor is considering a proposal to raise an extra £0.9m through further income generation.

The school forum noted the increases in traded service and the new services and supported the proposal that the council should not subsidise the school activity.

8. School Places

Members were updated with a table showing school places and the likely needs and capital requirements.

9 . Any Other Business

Meeting closed 6.42pm

Date of next meeting 11 December 2014

Public Health Programme – Budget Proposal 2015/16

1. Purpose Of This Report

This report provides details of proposals for the Public Health training programme in 2015/16 and the cost to schools.

2. Recommendations

The Forum note the report

3. Background

- 3.1 For many years the Public Health team, including the Drug and Alcohol service, in Lewisham have supported local schools in delivering Personal Social Health and Economic (PSHE) education and in delivering the Healthy Child Programme in schools. This has been through the delivery of both pupil education and workforce development courses on topics such as smoking, drug and alcohol use and sex and relationships education (SRE).
- 3.2 PSHE education makes a major contribution to schools' statutory responsibilities to provide a curriculum that is broadly based, balanced and that meets the needs of all pupils. Under section 78 of the Education Act 2002 and the Academies Act 2010 such a curriculum must *promote the spiritual, moral, cultural, mental and physical development of pupils at the school and of society, and prepare pupils at the school for the opportunities, responsibilities and experiences of later life.*
- 3.3 The interventions and training provided through Public Health empower children to make healthy choices that will benefit their wider education and well being and supports teachers to identify issues that can impact on individual and school-wide achievements e.g. drug and alcohol use.
- 3.4 However, Lewisham Public Health's budget is subject to review and savings of up to £3.3m are being considered. As such the capacity of Lewisham Public Health to support schools in public health areas will be limited.

4 Services for Primary and Secondary schools

It is within this context that these proposals are being made for Primary and Secondary schools. Services can also be provided for the Pupil Referral Unit and with parents. These proposals provide a brief description of each service offered and an estimated cost for schools dependent on the number of pupils. In addition, in the future it may

also be possible to include other services, not described below, such as road safety, walking to school and domestic violence.

Preventing the uptake of smoking among young people.

- 4.1 This is an evidenced based Tobacco Control Peer Education Programme for Year 8 pupils, which has been very well received by schools:
- Young people influencing other young people – Peer education
 - Understanding how tobacco companies target young people as ‘replacement smokers’
 - Health messages alone do not bring about change in teenagers’ behaviour in taking up smoking -teenagers respond to information about exploitation.
- 4.2 A group of year 8 pupils are chosen by their year 8 peers as young people they look up to. The training aims to positively influence the key influencers in Year 8. Those selected have 6-8 schools lessons of education on tobacco and the tobacco industry. Pupils conduct interviews with their peers to communicate the key messages they have learnt on the programme. The main task of all the peer educators is to design and deliver a short presentation to their tutor groups and/or assemblies giving the key messages.

Nutrition

- 4.3 The nutrition package offers a range of training to:
- support the School Food Plan which highlighted the importance of food in children's health and welfare.
 - support a whole school approach to food and nutrition that research h has shown is the effective way to influence child health and wellbeing.
 - equip teachers to implement nutrition in the curriculum and the compulsory practical cooking sessions to prepare and cook healthy nutritious recipes.
 - assess food across the school day such as food in after school clubs.
 - pupils to implement a healthy eating peer support programme.

Drug and Alcohol Education

- 4.4 Lewisham Prevention & Inclusion Team, formerly known as the drugs and alcohol Team (DAAT) has gained an excellent reputation for delivering a whole school and wider community approach to drug and alcohol education within Primary and Secondary Schools and has responded to the gap in provision and requests from schools for the following:
- Schools requiring support from external speakers in providing drug education within the curriculum

- Schools have requested training for teachers and support staff, workshops for parents/carers.
- 4.5 As a result the DAAT Training Team has worked with 30 different schools delivering workshops across Year 5/6 within Primary School settings and as part of the Junior Citizens Scheme. The DAAT training team has also worked with Key Stage 3 & 4 and Post 16 pupils within Secondary School settings.
- 4.6 All training sessions on drug and alcohol are delivered following needs assessments being undertaken within each school. Therefore the training is developed and delivered based on individual need and in accordance with DFE guidelines. This includes increasing pupils knowledge, skills and changing attitudes.
- 4.7 The DAAT training team also provide workshops which aim to help teachers/parents/carers gain accurate information and dispel the myths around drugs and alcohol. The team can offer ideas and suggestions on talking with children and young people, helping them to develop skills to manage drugs and alcohol related issues.

Sexual and Relationship Education

- 4.8 The sessions outline:
- The local picture about young people and sexual health
 - Sex and the law (using Barnardo's Bwise game) and includes the age of consent.
 - Exploration of consent and consensual sex.
 - LSCB training; traffic light game re sexual exploitation.
 - STIs (using glove game re transmission)
 - Condom demonstration and discussion around risks and impact of pregnancy and STI's. Pupils do condom demonstration.
 - Signposting of services including School Nurse drop in's and Sexual Health Clinics.

In all sessions interaction is encouraged by using games and activities. The pupils are encouraged to ask questions.

5. Service Level Agreement Charges

The following level of charges are being considered

5.1 Primary Schools

Topic	Brief description	Outcomes	Cost
Nutrition	<p>Support to individual schools from a qualified nutritionist / dietitian.</p> <p>All or a combination of the following nine elements can be provided. Each elements is 0.5 or 1 module</p> <ol style="list-style-type: none"> 1. Whole School Food Policy (1.0) 2. Curriculum Linked Food and Nutrition support for staff (0.5) 3. Healthy Packed Lunches/water in schools (0.5) 4. Food provision in breakfast and after school clubs (0.5) 5. Training on creating a health promoting environment in the school (1.0) 6. Planning and Support with a Health Promotion Week (1.0) 7. Support staff to access healthy eating / nutrition information and resources for parents and children (0.5) 8. Body Image (0.5) 9. Support primary school to set up and run family cooking programme. School to provide trained tutor to run a family cooking programme (1.0) 	<p>The benefits to schools and pupils include:</p> <p>Support children and young people to have the confidence, skills, knowledge and understanding to make healthy food choices to support healthy weight</p> <p>Pupil, staff and wider school community's increased knowledge and awareness of healthy eating and its impact on healthy weight.</p>	<p>Package priced on an individual school basis depending on the number of elements</p> <p>Minimum package elements: 2 modules.</p> <p>Estimated cost £900 per package</p> <p>If more than 20 schools take up the offer there may be capacity to increase the number of modules in package</p>
Physical activity/Healthy Lifestyles	<p>Hoops 4 Health basketball programme. Consists of three hour</p>	<p>Increased levels of physical activity</p>	<p>Roadshow =3hours Basketball</p>

	interactive roadshow covering healthy lifestyles (for up to 100 children); 10 week basketball coaching for 15-20 children and a fun competition and skills test day		coaching 10x 1 hr Competition day = 3 hours Estimated cost £900 per programme
Drugs and Alcohol	Needs Assessment Questionnaire Development of Programme Tailored to need of identified group Includes presentations, group discussion material, resources etc x 2 facilitators	Increased pupils knowledge Increased skills and attitudes Myths dispelled Reduced Drug and Alcohol use	Example Costing for 1 x Day Delivery Drug and Alcohol Education Sessions to Year Group £750
Junior Citizens	This is a popular and well established experiential programme for pupils in Year 6, co-ordinated by the police. Contributions are made by a range of teams and topics covered include smoking, drugs and alcohol and road safety		TBC

5.2 Secondary Schools:

Topic	Brief description	Outcomes	Cost
Preventing the uptake of smoking among young people	Tobacco Control Peer Education Programme. This is evidenced based: Steps: Set up programme Y8 member of staff responsible and set timetable for training sessions	Evaluation of this programme has been positive: It is an effective way to increase knowledge and attitudes about smoking	£665 total per school based on 6 forms in Year 8 per school 19 hours per school

	<p>Distribute & collect smoking questionnaires</p> <p>Select peer educators ie those with most votes from fellow pupils (2 per tutor group)</p> <p>Train peer educators</p> <p>Assess Peer educators</p> <p>Attend assembly presentations</p> <p>Analysis of questionnaires</p>	<p>It leads to increased self esteem and self confidence; communication skills and leadership and team skills among peer educators (often among previously disaffected pupils)</p>	
Nutrition	<p>Support to individual schools from a qualified nutritionist / dietitian.</p> <p>All or a combination of the following eight elements can be provided. Each component is 0.5 or 1 module</p> <ol style="list-style-type: none"> 1. Whole School Food Policy (1.0) 2. Curriculum Linked Food and Nutrition support for staff (0.5) 3. Healthy Packed Lunches/water in schools (0.5) 4. Training on creating a health promoting environment in the school (1.0) 5. Planning and Support with a Health Promotion Week (1.0) 6. Support staff to access healthy eating / nutrition information and resources for parents and children (0.5) 7. Body Image (0.5) 8. Peer support on healthy eating (2.0) 	<p>The benefits to schools and pupils include:</p> <p>Support children and young people to have the confidence, skills, knowledge and understanding to make healthy food choices to support healthy weight</p> <p>Pupil, staff and wider school community's increased knowledge and awareness of healthy eating and its impact on healthy weight.</p>	<p>Package priced on an individual school basis depending on the number of elements</p> <p>Minimum package elements: 2 modules.</p> <p>Estimated cost £900 per package</p> <p>If more than 20 schools take up the offer there may be capacity to increase number of modules in package</p>

<p>Sex and relationships Education</p>	<p>Interactive sessions delivered by sexual health nurses covering a variety of issues including; staying safe; negotiating relationships, contraception and sexually transmitted infections, condom use.</p> <p>1 hour sessions for each year group (4-5 forms per year)</p>	<p>Reduction in unwanted conceptions</p> <p>Better awareness & access to services</p> <p>Increased ability to navigate relationships and stay safe</p>	<p>£1,000 per year group</p> <p>Years 8,9, & 10</p> <p>£3,000</p>
<p>Drugs and Alcohol</p>	<p>Needs Assessment Questionnaire</p> <p>Development of Programme Tailored to need of identified group Includes presentations, group discussion material, resources etc x 2 facilitators</p> <p>Delivery of Drug/Alcohol Workshops</p> <p>Evaluation of Programme</p>	<p>Increased pupils knowledge</p> <p>Increased skills and attitudes</p> <p>Myths dispelled</p> <p>Reduced Drug and Alcohol use</p>	<p>Example Costing for 1 x Day Delivery Drug and Alcohol Education Sessions to Year Group</p> <p>£750</p>

Agenda Item 4

**Schools Forum
11 December 2014
Item 4**

Financial Update and Budget Monitoring report

1. Purpose of the Report

This report has three main purposes. It looks at the budget monitoring position of the Dedicated Schools Grant, it considers the latest schools' finance information and the financial position of the mutual funds held by the Forum.

2. Recommendation

- i) The Forum note the report
- ii) The Forum agrees the contingency bid referred to in 7.23

3 High Needs SEN

The High Needs SEN budget consists of the funding that is given to Special, Primary and Secondary schools for matrix children and resource bases, to FE providers and to independent schools. At the end of last year this budget was overspent by £823k. This years forecast is that it will be overspent by £1,501k. The main pressure is the growth in the number of pupils within the SEN matrix bands. The position will need to be revised once all the Autumn Term numbers have been collected and the review of which band of needs each child within each Special Schools falls in is complete.

4. School Budget Monitoring

Details of individual school's monitoring positions will be tabled at the meeting. At the time of setting their budgets, schools were saying the end of year balance would be £5m. The first budget monitoring return relates to the financial position as at the end of September. 7 returns remain outstanding: all of these schools have been contacted and reminded that they have passed the deadline. There are 6 returns where we have requested further details or have asked for clarification

A paper will be tabled showing the position school by school.

Indications from the returns in previous years would suggest there is an element of under forecasting of the year end balances. If we assume that this under forecasting is consistent the schools carry forward at the end of last year would be £15m. This compares with £16m. It must be noted that in these figures there is a large element subjective judgement.

There are two with deficit licence applications, Deptford Green and All Saints. The request from Deptford Green has been received and is in the process of being considered. We are awaiting clarification on All Saints budget.

5. Peer Review

At the last meeting of the Forum a peer review system was discussed with finance professionals across the sectors, drawn from maintained schools, academies and local authority staff. This would bring an extended range of skills that could combine together to provide a more comprehensive package of schools support and challenge for schools.

Currently we have had a school business manager and a chair of governors volunteer. We still require two schools to volunteer to be reviewed and would like a Headteacher on the panel. We anticipate that this would allow the two schools to benefit directly from the process.

6. Mutual Funds

The Schools Forum has a number of mutual funds it manages on behalf of schools. At the end of the year any balances are returned to schools or rolled forward to the next year. The current position of the funds is described below:

Fund	Budget	Spent or committed to date	Balance
	£000	£000	£000
Growth Fund	1,739	1,865	(126)
Contingency	1,253	280	973
Maternity Fund	831	831	0

7. Growth Fund

With the exception of one external payment, all Growth Fund allocations have now been actioned. The forecast expenditure of £1.87m is £126k in excess of the budget as a result of the creation of more new places than was anticipated.

The 2014/15 Growth Fund budget is £1,739k and is made up as follows

- £672k bulge classes (equivalent of 12 bulge classes),
- £762k expanding schools (some new, some continuing. Covers 13 schools) and
- £306k continuing funding for resources (funding is paid each year as new places move through the school).

8. Contingency

8.1 Last year's position:

At the last meeting we highlighted that a revaluation of the business rates at Prendergast Ladywell School site of the Leathersellers' Federation of Schools had taken place. At the time the assessment has been back dated for 5 years to 2010/11. The total extra charge for the 5 years is £601k. This was appealed against and it has now been agreed that the new rateable value will commence from October 2014 with no back dating. This will mean that the cost will reduce from £601k to £60k. This will still need to be funded from the contingency. A further revaluation at Gordonbrock Primary School has also been received with a cost of £220k.

There are two other schools, Rushey Green and Forster Park, for whom sizeable revaluations are anticipated.

8.2 No further bids have been made since the last meeting of the Forum.

8.3 Creation of a contingency for secondary schools with falling rolls

A bid from this contingency has been received. It will be tabled at the meeting (as it contains confidential information) for discussion and a decision on whether it should be approved.

9. Non-Sickness Supply Fund

At the end of last year the non-sickness supply budget was under spent by £89k.

Autumn Term claims will not be actioned by Schools HR until the term has ended so at present only the Summer Term data is available. The Summer Term claims breakdown as shown in the table below:

Phase	Claim Type	Number	Amount	Average
			£	£
Primary	Jury	3	1,387	462
	Maternity	11	65,867	5,988
	Paternity	1	1,640	1,640
	Suspension	2	7,387	3,694
		17	76,281	4,487
Secondary*	Jury Service	2	1,418	709
	Maternity	11	87,955	7,996
		13	89,372	6,875
Special	Maternity	2	9,323	4,662
	Suspension	1	5,904	5,904
		3	15,227	5,076
		33	180,880	5,481

* includes all-through schools

Dave Richards

Group Finance Manager – Children and Young People

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Agenda Item 5

Schools Forum
11th December 2014
Item 5

Schools Forum High Needs Sub Group Report And High Needs Budget For 2015/16

1. Purpose of the Report

To consider the recommendations of the report of the High Needs sub group and to consider the high needs funding block for next year.

2. Recommendation

- 1) The Forum consider each recommendation in the final report
 - i. Agree to no longer add back any of £6,000 matrix funding that was withdrawn last year
 - ii. Reduce the funding to the collaboratives by £300k
 - iii. Agree to the funding adjustment of £2,000 to Abbey Manor College top up rate which will keep the overall funding at the same level as 2014/15.
 - iv. To agree to the continuation of the work of sub group for a further year
 - v. To extend the brief of the group to incorporate the home to school transport budget
 - vi. To agree to the work plan as detailed in appendix A of the sub group report
- 2) To note the longer term financial pressures on the High Needs Block
- 3) The Forum thank the Headteachers for their work on the sub-group

3. Background

- 3.1 The Task Group was set up by the Schools Forum to review the costs of funding high needs pupils. Specifically the group were asked back at the start of 2013 to reduce the on-going costs of the high needs pupils by £0.5m in 2014/15 and £2m in 2015/16. A reduction in the financial support for matrix children was agreed last year for 2014/15 to deliver a saving of £0.5m.
- 3.2 The latest indication is that cost reduction required in 2015/16 is still £2m.

- 3.3 The work of the sub group was originally intended to end this year. Members of the group feel that with the continuation of the budgetary pressures on the High Needs Funding Block that the work needs to continue. Attached to this paper is the report of the sub group on next year's budget.

4. Dedicated Schools Grant - High Needs Block Forecast 2015/16

- 4.1 The level of funding that will be available to the Local Authority next years is difficult to predict.
- 4.2 During December the DFE expect to announce the allocations of the high needs block element of the DSG to all local authorities.
- 4.3 There has been a bidding process for Local Authorities to seek extra resources for increases in pupil numbers. The documentation received from the DFE indicated that changes to pupil numbers in Lewisham are not significant enough to warrant funding. It is for this reason that it is assumed that no extra resources will be received and the amount received last year will not have inflation added .

5. High Needs Block Expenditure Estimate for 2015/16

- 5.1 The pupil population continues to grow; between October 2013 and October 2014 there has been growth of 3%.
- 5.2 For planning purposes it has been anticipated that on average there will be 5 new pupils per month with ECH plans that require funding and there will be an extra 10 pupils across special schools for the year.

The planned direct costs for next year is as follows:

Current Spend Forecast For Special Educational Needs	2014/15	Forecast Additional Need 2015/16		
		Existing Cases	Growth	Total
	£'000	£'000	£'000	£'000
SEN Matrix	4,137	90	260	350
Pupil Referral Unit	3,000			
Resource Bases	1,556			
SEN Matrix Funding for Academies	604			
Special Schools	15,609	162	134	296
Independent places \ colleges \ other LA Schools	8,204			
	33,110	252	394	646
Budget	31,609	A	B	
Forecast overspend	1,501	C		
Budget Requirement Next Year				
Existing Cases		252	A	
Growth		394	B	
Extra budget requirement		£2,147	A+B+C	

The table above shows that in 2015/16, if no action is taken, the SEN budget will overspend by £2.1m

6. Dedicated School Grant medium term financial issues

- 6.1 The longer term funding position remains uncertain, particularly with the general election being next May. Both of the main political parties are like minded in that they wish to see the national deficit eliminated. The only current differences between the parties is the timescales by which this should be achieved.
- 6.2 The most likely scenario is that we will not see any growth in the DSG in Lewisham. Current funding for the schools block has been cash frozen although it has risen in line with pupil numbers. The high needs block has been cash frozen but there has been only a partial increase in funding for the growth in numbers. This trend is expected to continue for the foreseeable future.

- 6.3 The national funding for the schools block will grow in 2015/16 but Lewisham will not receive any benefit from this as it is not defined by the Department for Education (DFE) as one of the lower funding authorities on a per pupil basis, which remains their priority. The DFE are starting to review the high needs funding of the DSG. It is anticipated that again Lewisham will be regarded as a better funded Authority and is unlikely to receive any extra funding.
- 6.4 As we have seen, the current financial forecasts show the high needs budget is overspending. The budget strategy has been focused on ensuring that special educational needs spending balances to the funds available while protecting the schools budgets as much as possible.
- 6.5 The medium term outlook from 2016 to 2020 shows significant costs in the future, with the distinct possibility that there will be no extra funding. These costs will need to be managed and there will be an on-going need to consider savings for the foreseeable future.
- 6.6 Medium Term Financial Budgetary Pressures on the High Needs Block

6.6.1 SEN numbers pressure - likely no funding

Current pupil numbers are growing in the primary age group by 3.3%, in the secondary age groups the numbers are growing but by 1.2%. The current system of funding high needs pupils is such that funding does not grow in line with the growth in numbers. There is a bidding process that Local Authorities are expected to participate in to see if any extra funding should be provided.

With the growth in numbers, if the cost is not managed this equates to £1.2m a year, which within the current funding arrangements, would have to be funded from DSG funds for schools.

6.6.2 New responsibilities to age 25

Local authorities must set out in their Local Offer the support and provision that 19- to 25-year-olds with SEN can access regardless of whether they have an EHC plan (see Chapter 4, The Local Offer). Further education colleges must continue to use their best endeavours to secure the special educational provision needed by all young people aged 19 to 25 with SEN attending their institution.

19- to 25-year-olds with EHC plans should have free access to further education in the same way as 16- to 18-year-olds. Colleges or training providers must not charge young people tuition fees for such places as the funding will be provided by the local authority and the Education Funding Agency (EFA).

6.6.3 Medium term financial issues – financial impact on the high needs block

	2016/17	2017/18	2018/19	2019/20
	£'000	£'000	£'000	£'000
High Need pupil growth	1200	1200	1200	1200

7. There are a number of possibilities to deal with these pressures. The review of the banding structure being considered by the High Needs Sub Group will need rates of funding attached to the bands. This will need to be carefully considered in the light of the funding envelope available. Other reviews are under way, particularly the funding at Abbey Manor College and New Woodlands. All aspects of the high needs block will need to be considered but there is a possibility if the high needs block cannot be balanced, then consideration will need to be given to withdrawing money from the schools budget.

8 Conclusion

- 8.1 The financial constraints that the public sector is operating under are not expected to ease over the next few years. The problem faced by the high needs block is that the growth in expected pupil numbers is higher than the general growth in the pupil population. It is believed nationally that the level of funding will be capped or only a small amount of growth allowed for. The planned review of funding of the high needs block could result in a likely redistribution of resources amongst authorities though at best the level of resources is likely to be cash frozen over the next few years.

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Schools Forum High Needs Sub Group

Schools Forum

Task Group Report

Task Group Members

Jon Sharpe	Headteacher	Brent Knoll
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Ruth Holden	Headteacher	Bonus Pastor
Steve Davis	Executive Headteacher	Coopers Lane and Launcelot Federation
Janaki Monk	Assistant Principal Inclusion	Haberdashers' Aske's Hatcham College
Liz Jones	Headteacher	Abbey Manor College

Officer Support

Warwick Tomsett	Head of Targeted Services and Joint Commissioning
Keith Martin	Children With Complex Needs Service Manager
Alan Docksey	Head Of Resources and Performance, CYP
Dave Richards	Finance Manger

1. Recommendations

- 1.1 That the Schools Forum:-
- i. Agree to no longer add back any of £6,000 matrix funding that was withdrawn last year
 - ii. reduce the funding to the collaboratives by £300k
 - iii. agree to the funding adjustment of £2,000 to Abbey Manor College top up rate which will keep the overall funding at the same level as 2014/15.
 - iv. To agree to the continuation of the work of sub group for a further year
 - v. To extend the brief of the group to incorporate the home to school transport budget
 - vi. To agree to the work plan as detailed in appendix A of this report

2. Background

- 2.1 The Task Group was set up by the Schools Forum to review the costs of funding high needs pupils. Specifically the group were asked at the start of 2013 to reduce the on-going costs of the high needs pupils by £0.5m in 2014/15 and £2m in 2015/16. A reduction in the financial support for matrix children was agreed last year for 2014/15 to deliver a saving of £0.5m with an indication that a further reduction should take place to meet the shortfall unless alternative funding for high needs block was identified.
- 2.2 The latest indication is that cost reduction required in 2015/16 is £2.1m.

3. Special Schools Funding

- 3.1 The funding system operates by giving each special school £10,000 for a place commissioned prior to the start of the year. This is regardless of the number of pupils attending the special school. For each pupil who attends the school during the year an additional sum or top-up is given. It is this top-up rate that varies for each school in 2013/14 and as part of the proposals endorsed by the Schools Forum all top up rates were merged for each type of designated need.

3.2 There is one exception; New Woodlands, which if their funding rates were brought into line with other special schools, would have suffered a loss of £250k. It was decided to freeze the funding rates for New Woodland this year until further analysis was undertaken.

The current funding rates for special schools are

Table 3.1

	Merged rate	New Woodlands School
	£	£
MLD1	-	-
MLD2, SLD1, ASD1, BESD1	3,104	4,294
SLCN Cog	4,991	-
HI/VI1, Med/Phys + Cog	6,621	-
SLD2, ASD2, BESD2	7,402	10,241
PMLD1, SLD3 - Aut/BEHR	19,222	-
HI/VI2	18,344	-
PMLD2 Hi Care	23,396	-
SLD4, SLD Hi Care, ASD3	28,726	-

Key of abbreviations

ASD	Autistic Spectrum Disorders
MLD	Moderate Learning Difficulties
SLD	Severe Learning Difficulties
BESD	Behavioural Emotional And Social Difficulties
SLCN	Speech, Language & Communication Needs
HI	Hearing Impaired
VI	Visually Impaired
PMLD	Profound And Multiple Learning Disabilities

3.3 MLD1 – This does not have a top up rate as the base funding of £10k covers the costs assessed. Some boxes are blank for New Woodlands as the school does not have pupils within these bands.

3.4 Further consideration was given to the bandings. In the table above it can be seen that in the special school sector there are usually three banding levels for each need and there are considerable differences in funding for each of these levels. For example a band 1 ASD attracts £3,041, a band 2 £7,251 and a band 3 £28,141. While these are large differences currently there is no evidence to say that these differentials are still valid. Initial discussions with schools indicate that there is a difficulty in deciding which bandings pupils exactly fall in and the local authority, as commissioner of the places, needs a process in place to ensure that these band allocations are correct.

3.5 The current process for funding special schools involves schools submitting details of their pupils and which bands they believe the pupils belong in. There is limited capacity within the Local Authority to robustly monitor and challenge all the pupils across the SEN sector. The view of special schools is that it difficult to allocate each child into a band and an element of judgement is needed. In reviewing this year's return, one special school believed the needs of its pupils were such that additional funding of over £1m would be needed by the school.

3.6 With both the funding differential and moderation issues, set out above, it was felt that a different approach was needed. Further, the merger of funding rates were considered but not felt desirable unless it sat alongside a complete review of the banding structure.

3.7 A banding system based on need/ provision rather than the current diagnostic system would seem to address these issues. Salford City Council operate such a system and an exercise is being undertaken to match a sample of pupils in Lewisham to the bands. The funding amounts, attached by Salford to their banding, do not seem appropriate in relation to Lewisham schools and would need revising. The work to date indicates that the work involved to apply the Salford approach will be significant for existing statements but less so where a EHC is in place.

There are currently around 1500 pupils with high needs SEN in Lewisham and to map each one will take considerable resources and time. It is not felt that there will be sufficient time before the start of the financial year to give due diligence to such a large scale exercise and for this reason it is recommended not to make changes to the current bands at the start of the next financial year.

3.8 Realistically the work could be completed for an implementation date in September 2015. Any large scale changes to the funding system will create winners and losers. It may not be welcome to schools and especially special schools who receive the vast proportion of their funding linked to the banding system to see a change during the

financial year where there is limited time to formulate school re-organisations. It is for this reason that it is recommended that the earliest implementation of a change to the banding system is not undertaken until April 2016 and as a consequence the work of the sub group should be extended until this date. This would allow further work on the actual banding to be proposed in Lewisham and to be clear about the implementation issues.

4. Resource Bases

- 4.1 The resource bases operate on a similar funding methodology to Special Schools. There is an upfront payment of £10,000 for each place commissioned by the Local Authority prior to the start of the year. This is then topped up on the basis of the number of places within the unit that are filled. This is on a real time basis so that if a pupil leaves only top-up funding is removed. Current top-up funding rates are very different for children in resources bases and those with the same needs in special schools. This is partly attributable to the fact that start-up costs and expansion costs are built into the current funding rates for recently opened provision. The top up rates are more meaningful if all these adjustments are stripped out. The underlying rates are shown below.

Resource base top up (when unit full)		£
Rushey Green Primary School	HI	7,649
Deptford Green School	Dyslexia	7,877
Conisborough College	ASD	10,726
Tidemill Primary School	Speech and Language	8,600
Torridon Infants/Juniors	ASD	10,726
Athelney Primary School	ASD	10,726
Kelvin Grove	ASD	10,726
Cooper's Lane Primary School	Total Communication	10,863
Sedgehill School	Total Communication	11,087
Addey and Stanhope School	Speech and Language	11,389
Perrymount Primary School	Complex Physical & Medical Needs	12,934

- 4.2 This does raise a number of questions and in particular how these rates fit in with the special school rates. In theory, you would expect lower funding rates in the resource base as the needs of the pupil should be lower. In practice this may not be the case due to diseconomies of scale, as most resource bases are small and hence the management costs of the unit are spread over fewer children making the cost per pupil proportionally higher. Management costs are

higher as resource bases have been seen as discrete operations within their school.

- 4.3 It is felt though that any review of the banding system should include pupils in resources bases to get a better understanding of their needs.

5. Matrix Funding

- 5.1 The mainstream school funding for pupils having high needs is complex, with a variety of different sources. Some of which is more specifically identified than others. The sources of funding can include:

- Schools budget
- Collaborative funding
- Matrix funding

5.2 Schools Budget

- 5.2.1 The national funding reforms have been predicated on the basis that schools should be making a contribution of up to £6,000 for a high needs pupil from the school's budget. This figure is based on national averages of high needs funding following a report by PriceWaterhouseCoopers for the DFE. There is no specific element within the funding formula that determines the £6,000.

- 5.2.2 The first analysis was to consider this £6,000 and then to look at the matrix levels funding to see if there was an element of double funding that still existed.

- 5.2.3 The funding sources within the formula that make up the £6,000 are as follows:

- Primary FSM Ever 6
- Secondary FSM Ever 6
- Primary IDACI
- Secondary IDACI
- Foundation Stage Profile
- Key Stage 2 Results
- Primary Mobility
- Secondary Mobility

- 5.2.4 When considering this issue when the new funding reforms were introduced it was felt, some of the above funding should be applied to those pupils with needs lower than the current level of matrix 6, which

would likely be pupils who were at School Action or at School Action Plus. The needs of these pupils, the funding available and the actual spend by schools for these pupils is an area that needs greater understanding. For the purposes of this analysis the pupils have been allocated funding in these ratios:

School Action	0.5
School Action Plus	0.66
Statemented Pupils	1.00

5.2.5 The new SEN Code of Practice merged the two current categories of 'School Action' and 'School Action Plus' into one category 'Additional SEN Support'. In theory this should not change the calculation of the £6,000 for matrix children.

5.2.6 In coming up with these ratio's there is an element of subjective judgement. Not all pupils on school action will have spent on them exactly half that of statement child however it was thought to be around the correct funding level.

5.2.7 This results in the following allocation

Type of school	Average
Primary Schools	£6,129
Secondary Schools	£6,801

5.2.8 It would be misleading to indicate that all schools had this level of funding for each of their high needs pupils on matrix 6 and above as the £6,000 quoted is an assumed average. The ranges for primary schools are from £1,870 to £15,400 and for secondary schools £3,300 to £14,500 and reflect social deprivation led funding and numbers of statements.

5.2.9 These ranges are created by the way the current funding is operated. The formula has various factors that reflect SEN and deprivation within a school. In the more affluent areas of Lewisham say around Blackheath, proportionately, schools receive lower levels of support through their budget for SEN and deprivation. If these schools still have a high number of statements then on average they receive a lower level of funding per pupil. Conversely, the opposite happens in the more deprived areas around say New Cross.

5.2.10 The detailed calculations that this is based on are shown in Appendix B to this report.

6. Matrix Funding

6.1 The matrix funding acts as a top-up to the £6,000. This funding does not form part of the funding formula but is allocated to schools on the basis of the number of statements the school has and the level of the pupils' needs. The funding for this is given to schools on a real time basis. If a pupil with a statement leaves the school then the funding is

removed. Conversely if a pupil with a statement joins the school the appropriate level of funding is given to the school.

6.2 The level of funding depends on the Matrix level which relates to the needs stated within the statement. The funding levels are shown in the table below.

Table 7.2

Matrix level		LSA hrs per week	Pre 16
Below 19 hours of additional support through collaborative funding and the school budget share	3	7.0	
	4	10.0	
	5	16.0	
	6	19.0	£9,659
	7	22.5	£11,659
	8	27.5	£14,517
	9	32.5	£17,374
	10	35.0	£18,803

6.3 For those pupils below level 6 no funding is given in this way. Support is funded through the school's budget and through collaborative funding.

6.4 The matrix top up levels for the surrounding Local Authorities are as follows:

	25
	Hours
	£
Greenwich	£7,082
Southwark	£12,715
Bexley	£6,512

Bromley	£6,220
Lewisham	£13,088

- 6.5 For 2014/15 the Schools Forum agreed to take away the full funding of £6,000 from schools. The Forum did agree for 2014/15 only that a sum of £4,800 would be passed back to schools for each pupil on Matrix 6 and above. This would be subject to review depending on the finances, but it was assumed that as the projected shortfall for 2015/16 was rising to £2m then no funding could be given back to schools
- 6.6 It is the view of the group that the reduction should be fully applied. This will yield a saving of £1.8m
- 6.7 Consideration was given to a different approach whereby rather than reduce the top-up funding, funding could be removed from the Individual Schools Budget by reducing the value of the relevant formula factors to achieve the cost reduction of £2m. The result of modelling this option is shown in Appendix C. There are a number of odd results where some schools with no statements lose money and vice versa. These unexpected outcomes relate to the operation of the minimum funding guarantee (MFG).

The minimum funding guarantee (MFG) protects the per-pupil funding of schools from one year to the next against significant changes in the funding formulae or changes in data not directly related to pupil numbers. The MFG has been set at minus 1.5% per pupil since 2013-14. Oddly if a school role rises they are likely to receive protection despite the extra pupils creating extra resource. If a school has a falling roll it is often the case that protection is lowered. The reason for this is that protection operates at the funding per pupil level and not the school level.

For these reasons the Group recommends that reduced spending of £2m is mainly achieved by a reduction in the matrix top up and not from the delegated budget of the schools. However this can only contribute £1.8m of the total projected pressure for 2015/16.

7. Collaborative Funding

- 7.1. As detailed above, this funding is for pupils with low level special educational needs, determined as being below matrix level 6. The funding forms part of the Dedicated Schools Grant and is allocated to each collaborative based on a formula. This formula is made up of free school meals eligibility, prior attainment, mobility and pupil numbers.

The total amount of the funding across Lewisham is £1.8m, the individual allocations are shown in Appendix B to this report.

7.2 The collaborative funding was created when it was agreed to not issue statements for children with needs covered in the range of matrix 1 to 5. The funding linked to those former statements was then used to create the collaborative funding allocations. This would therefore be the equivalent of the £6000 assumed to be in the delegated budgets of schools for pupils with needs equivalent to the old matrix 1-5.

7.3 The collaboratives generally use this funding in two ways; they either pass it back to the schools within the collaborative on the same basis as the formula allocation or they use the funding to employ specialists such as speech therapists, which are then used by the schools across the collaborative. A recent consultation with Primary Strategic on the continuation of this arrangement for funding on balance favoured its

continuation, but this was not an overwhelming view. Next year the Group will look at the way some collaboratives utilise their funding in order to promote and share good practice.

7.4 As the reduction of matrix top up funding by £6k per pupil only generates £1.8m the Group considered where the balance might be identified from. It considered the Collaborative funding as well as schools delegated budgets. For the reasons set out above, delegated budgets route was not favoured and instead the Group concluded Collaborative Funding would be more appropriate to meet the shortfall.

8. The Funding Of Pupil Referral Units

8.1 The DFE are bringing the commissioned place led funding for PRUs into line with special schools. Lewisham's only designated PRU is Abbey Manor College and for each place next year the funding will have to increase from the current £8,000 to £10,000. To offset this it is recommended that the Forum agree to reduce the college top up by £2,000. This will mean the change will have a neutral effect. The review of bandings, discussed elsewhere in the paper will also cover the college.

9. School Transport

9.1 The School Transport budget is funded by the General Fund. At the end of last year the budget was overspent by £659k. A saving was also agreed of £500k which was to be achieved by increasing independent travel by students and reducing the unit costs of taxis. The last

tendering around for taxi provision resulted in some reduced costs in line with the budget proposal however there has been little progress on the increased use of independent travel.

- 9.2 The rising pupil population has placed extra pressure on the transport budget. To reduce the use of costly out of borough placements, the needs of pupils are being met in borough to reduce both overall placement and transport costs.
- 9.3 It is expected that the new tendering arrangements will make some savings during the remainder of the year but these cannot be quantified at this stage.
- 9.4 The current number of children being provided with travel is as follows

	Pupils	Average per client	
		Per Year	Per Week
Door 2 Door	415	£5,516	£145.15
Taxi's	224	£8,116	£213.58
Direct Payments	5	£2,000	£52.63
Total	644	£6,393	£168.23

- 9.5 The underlying pressure remains and further work on reducing the costs of travel assistance for 2015/16 continue to ensure the original saving proposal can be achieved.
- 9.6 Current proposals to manage the overspend include
- a. Parent Responsibility (£281k) – through expecting parents of children who are under 7 with less complex needs to accompany their children to school.
 - b. Independent Travel (£102k) – for the over 14's
 - c. Direct Payments (£528k)
 - d. Independent travel training pilot (£74k)
- 9.7 If these proposals are implemented successfully the budget, while remaining overspent this year, would balance next year. However it is expected that the growth in pupil numbers would still need to be managed and assuming that the increase in numbers is 3% a further saving of £100k will need to be found to balance the budget next year.

- 9.8 The implementation of these savings will not impact on schools but will require their support to achieve. The Schools Forum are asked that the remit of the sub group be extended to cover this issue due to the close links with spend on the high needs block within the DSG.

10. Procurement of Independent Special School placements with other London Borough's

- 10.1 The Council is working with a number of other boroughs to introduce a procurement framework to reduce costs. The aim is to work more collaboratively on the commissioning of good quality SEN placements in the non-maintained/independent sector.
- 10.2 The objectives of the Framework are to achieve the best outcomes for an increasing number of children with SEN, to achieve efficiency savings through negotiations with providers and to develop market intelligence and good practice to assist commissioning.
- 10.3 Most boroughs do not have formal contracting arrangements; typically placements are spot purchased, which creates a variation in the price per student. The work across a number of boroughs will help reduce the level of work involved in procuring services.

Schools Forum High Needs Sub Group Action Plan

Objective	Action	Outcome	Person Responsible	Sub group role	Success Measurement	Timescale	Status
Review Current Banding Structure	LA to work with Schools to review the current banding structure and to put in place a new structure	An appropriate banding structure is implemented that is consistently applied across the LA and all schools, that will enable schools to receive the appropriate level of funding to be able to meet the needs of individual children with SEND	Keith Martin / Dave Richards	To advise and help shape recommendation to Forum	New Banding structure is implemented. Lewisham Schools are able to meet the needs of children with SEND with the finances available within the banding.	Fiscal year 16/17	Green
Review Commissioning Of Independent School Provision	LA to undertake a business case analysis (this will include consultation	Reduction in costs of ISP's	Keith Martin / Caroline Doyle	To advise and help shape recommendation to Forum	Reduced spend within the Out of Borough Placement Budget	April 2015	Green

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	with neighbouring authorities) to establish the potential to develop a commissioning strategy or Preferred Provider Framework for ISP's						
School Transport	To consider the implementation of independent travel and direct payments	Establish transparency across the LA and schools	Keith Martin	To analyse and support	That we achieve zero overspend	2015/16	Amber
Audit Of SEN Spend	To undertake a review of total SEN spend to establish how this resource is being used to meet the needs of children with SEN	Establish transparency across the LA and schools in relation to how the DSG is meeting the needs of children with SEN	Keith Martin / Dave Richards	To analyse and support	That we achieve zero overspend against the Dedicated Schools Grant	December 2014	Green

Collaborative Funding 2014/15

	Lo Need/Hi Incidence SEN - Social Deprivation	Lo Need/Hi Incidence SEN - Prior Attainment	Lo Need/Hi Incidence SEN - Casual Joiners	Lo Need/Hi Incidence SEN - Protection	Lo Need/Hi Incidence SEN - Total	£300k Reduction	Revised Allocation
Nursery	2,907	-	-	2,685	5,592	- 778	4,814
Primary	445,713	190,142	185,937	74,063	895,855	- 124,628	771,227
Secondary	297,245	306,154	98,857	64,810	767,067	- 106,712	660,355
All Thru	94,545	92,336	43,884	-	230,765	- 32,103	198,662
Academies	107,977	77,534	41,463	30,210	257,184	- 35,779	221,405
Balance	948,387	666,166	370,141	171,769	2,156,462	- 300,000	1,856,462

Cost Centre	DfES No	Primaries	Lo Need/Hi Incidence SEN - Social Deprivation	Lo Need/Hi Incidence SEN - Prior Attainment	Lo Need/Hi Incidence SEN - Casual Joiners	Lo Need/Hi Incidence SEN - Protection	Lo Need/Hi Incidence SEN - Total	£300k Reduction	Revised Allocation
EMBA	2000	Adamsrill Primary School	13,087	5,278	4,213	-	22,578	- 3,141	19,437
EMJE	3301	All Saints' Church of England Primary School	626	474	641	4,925	6,666	- 927	5,739
EMBC	2878	Ashmead Primary School	3,531	2,350	2,175	642	8,699	- 1,210	7,489
EMBE	2023	Athelney Primary School	13,607	5,603	6,831	-	26,041	- 3,623	22,418
EMBH	2029	Baring Primary School	5,099	1,753	1,707	-	8,559	- 1,191	7,368
EMBK	2887	Brindishe Lee Primary School	2,271	1,557	1,150	3,951	8,929	- 1,242	7,687
EMGA	2068	Beecroft Garden Primary School	7,951	4,715	3,686	-	16,352	- 2,275	14,077
EMBM	2108	Childeric Primary School	12,469	5,005	3,484	-	20,959	- 2,916	18,043
EMJH	3325	St George Church of England Primary School	6,160	2,551	1,819	-	10,530	- 1,465	9,065
EMBP	2127	Cooper's Lane Primary School	8,101	4,032	3,999	590	16,722	- 2,326	14,395
EMBR	2148	Dalmain Primary School	7,018	3,652	2,618	-	13,287	- 1,849	11,439
EMBV	2158	Deptford Park Primary School	19,012	8,245	7,361	-	34,619	- 4,816	29,803
EMCA	2163	Downderry Primary School	12,813	3,300	4,332	-	20,445	- 2,844	17,601
EMCC	2187	Edmund Waller Primary School	6,098	3,739	2,599	1,642	14,078	- 1,958	12,119
EMGH	2197	Elfrida Primary School	10,715	4,993	4,304	-	20,013	- 2,784	17,229
EMCE	2815	Eliot Bank Primary School	6,391	3,292	3,468	3,018	16,170	- 2,249	13,920
EMCH	2811	Fairlawn Primary School	5,328	1,442	3,275	5,842	15,888	- 2,210	13,677
EMCK	2225	Forster Park Primary School	14,671	5,535	6,501	-	26,707	- 3,715	22,991
EMJK	3344	Good Shepherd RC School	4,212	1,847	1,283	759	8,101	- 1,127	6,974
EMGR	2259	Gordonbrock Primary School	8,650	3,731	3,622	2,148	18,152	- 2,525	15,626
EMCM	2267	Grinling Gibbons Primary School	7,691	1,652	1,488	-	10,832	- 1,507	9,325
EMCP	2289	Haseltine Primary School	16,273	3,380	6,326	-	25,980	- 3,614	22,365
EMCR	2304	Brindishe Green Primary School	16,062	8,245	7,536	-	31,844	- 4,430	27,414
EMCV	2307	Holbeach Primary School	10,984	6,823	4,694	-	22,501	- 3,130	19,370
EMJM	3661	Holy Cross Roman Catholic Primary School	2,659	1,436	816	2,547	7,458	- 1,038	6,421
EMJP	3360	Holy Trinity Church of England Primary School	4,412	1,057	2,289	-	7,758	- 1,079	6,679
EMDA	2870	Horniman Primary School	2,092	1,687	916	2,635	7,329	- 1,020	6,310
EMDC	2782	John Ball Primary School	5,052	3,014	2,959	4,681	15,706	- 2,185	13,521
EMDE	2342	John Stainer Primary School	4,386	1,933	2,336	1,184	9,839	- 1,369	8,470
EMDH	2347	Kelvin Grove Primary School	14,651	3,474	4,233	-	22,358	- 3,110	19,248
EMDK	2349	Kender Primary School	7,481	3,793	3,863	-	15,138	- 2,106	13,032
EMDM	2911	Kilmorie Primary School	7,149	2,946	4,089	741	14,925	- 2,076	12,849
EMDP	2374	Launcelot Primary School	10,876	4,648	4,573	-	20,096	- 2,796	17,301
EMGV	2381	Brindishe Manor Primary School	6,620	3,405	4,227	528	14,779	- 2,056	12,723
EMDV	2390	Lucas Vale Primary School	9,784	2,889	4,975	-	17,648	- 2,455	15,193
EMHC	2403	Marvels Lane Primary School	10,109	5,123	5,186	-	20,419	- 2,841	17,579
EMEE	2869	Myatt Garden Primary School	7,107	2,758	3,268	1,488	14,620	- 2,034	12,586
EMJV	3588	Our Lady and St Philip Neri Roman Catholic Primary School	4,273	1,801	1,569	2,372	10,015	- 1,393	8,622
EMEH	2871	Perrymount Primary School	6,506	2,130	3,280	-	11,916	- 1,658	10,258
EMEK	2491	Rangefield Primary School	12,754	4,197	5,779	-	22,730	- 3,162	19,568
EMEM	2493	Rathfern Primary School	10,082	4,284	5,893	-	20,259	- 2,818	17,441
EMEP	2529	Rushey Green Primary School	10,441	5,616	4,882	-	20,940	- 2,913	18,027
EMHK	2536	Sandhurst Infant School	4,899	2,111	759	2,109	9,878	- 1,374	8,504
EMHH	2535	Sandhurst Junior School	5,515	2,224	1,740	757	10,236	- 1,424	8,812
EMER	2818	Sir Francis Drake Primary School	5,061	1,548	2,198	-	8,808	- 1,225	7,582
EMKC	3416	St Augustine's Roman Catholic Primary School and Nursery	2,958	1,415	895	1,865	7,132	- 992	6,140
EMKE	3420	St Bartholomews's Church of England Primary School	5,902	2,238	3,022	-	11,161	- 1,553	9,609

Collaborative Funding 2014/15

Cost Centre	DfES No	Primary
EMKH	3454	St James's Hatcham Church of England Primary School
EMKK	3472	St John Baptist Southend Church of England Primary
EMKM	3478	St Joseph's Catholic Primary School
EMJR	3374	St Margaret's Lee CofE Primary School
EMKP	3315	St Mary Magdalen's Catholic Primary School
EMKR	3518	St Mary's Church of England Primary School
EMKV	3548	St Michael's Church of England Primary School
EMLA	3594	St Saviour's Catholic Primary School
EMLC	3597	St Stephen's Church of England Primary School
EMLE	3650	St William of York Roman Catholic Primary School
EMLK	3612	St Winifred's Catholic Infant and Nursery School
EMLH	3654	St Winifred's Catholic Junior School
EMHP	2571	Stillness Infant School
EMHM	2570	Stillness Junior School
EMHV	2606	Torridon Infant School
EMHR	2605	Torridon Junior School
EMJC	5200	Turnham Primary School

Lo Need/Hi Incidence SEN - Social Deprivation	Lo Need/Hi Incidence SEN - Prior Attainment	Lo Need/Hi Incidence SEN - Casual Joiners	Lo Need/Hi Incidence SEN - Protection	Lo Need/Hi Incidence SEN - Total
4,090	1,686	1,407	-	7,183
2,086	887	824	2,901	6,698
5,249	932	1,923	900	9,004
2,635	1,292	1,959	1,074	6,960
2,529	1,607	824	1,422	6,382
4,325	2,869	2,122	-	9,316
3,593	1,763	1,465	287	7,108
4,190	2,325	602	-	7,117
3,831	2,294	1,901	154	8,179
3,166	1,093	1,385	2,443	8,086
392	302	311	4,398	5,402
652	1,036	183	3,499	5,371
2,131	2,026	798	4,126	9,080
3,729	1,825	1,557	3,504	10,615
4,048	1,750	400	3,184	9,383
6,919	2,401	1,191	1,747	12,258
12,556	5,132	4,227	-	21,915
445,713	190,142	185,937	74,063	895,855

£300k Reduction	Revised Allocation
- 999	6,184
- 932	5,766
- 1,253	7,751
- 968	5,992
- 888	5,494
- 1,296	8,020
- 989	6,119
- 990	6,127
- 1,138	7,041
- 1,125	6,961
- 752	4,651
- 747	4,624
- 1,263	7,817
- 1,477	9,138
- 1,305	8,078
- 1,705	10,553
- 3,049	18,866
- 124,628	771,227

Cost Centre	DfES No	Secondaries
EMQA	4600	Addey and Stanhope School
EMQH	4802	Bonus Pastor Roman Catholic School
EMMA	4249	Conisborough College
EMNA	4047	Deptford Green School
EMNH	4289	Forest Hill School
EMRP	4646	Prendergast School
EMPH	4267	Sedgehill School
EMPP	4204	Sydenham School

30,548	25,702	5,059	-	61,308
24,879	28,454	6,113	14,979	74,426
43,190	45,256	14,544	-	102,991
50,245	53,077	19,181	-	122,503
38,469	45,324	13,701	15,318	112,811
17,463	12,681	5,691	19,447	55,282
53,891	58,693	21,921	-	134,506
38,560	36,966	12,647	15,066	103,239
297,245	306,154	98,857	64,810	767,067

- 8,529	52,779
- 10,354	64,072
- 14,328	88,663
- 17,042	105,461
- 15,694	97,117
- 7,691	47,592
- 18,712	115,794
- 14,362	88,877
- 106,712	660,355

Cost Centre	DfES No	All Thru Schools
EMMP	4323	Prendergast Ladywell School
EMSA	5201	Prendergast Vale School
EMRH	4636	Trinity Lewisham

46,033	49,680	23,818	-	119,532
24,409	18,789	5,310	-	48,508
24,102	23,868	14,755	-	62,725
94,545	92,336	43,884	-	230,765

- 16,629	102,903
- 6,748	41,760
- 8,726	53,999
- 32,103	198,662

Cost Centre	DfES No	Recoupment Academies
EMEC	6905	Haberdashers' Aske's Hatcham College
EMEA	6906	Haberdashers' Aske's Knights' Academy
EMEV	2599	Tidemill Primary School

44,262	32,345	6,554	30,210	113,371
51,972	38,958	31,433	-	122,362
11,743	6,232	3,476	-	21,451
107,977	77,534	41,463	30,210	257,184

- 15,772	97,599
- 17,023	105,340
- 2,984	18,467
- 35,779	221,405

Cost Centre	DfES No	Nurseries
EMAA	1011	Chelwood Nursery School
EMAC	1002	Clyde Nursery School

1,453	-	-	1,390	2,843
1,453	-	-	1,295	2,749
2,907	-	-	2,685	5,592

- 396	2,448
- 382	2,366
- 778	4,814

Primary	445,713	190,142	185,937	74,063	895,855	- 124,628	771,227
Secondary	297,245	306,154	98,857	64,810	767,067	- 106,712	660,355
All Thru	94,545	92,336	43,884	-	230,765	- 32,103	198,662
Academies	107,977	77,534	41,463	30,210	257,184	- 35,779	221,405
Nursery	2,907	-	-	2,685	5,592	- 778	4,814
	948,387	666,166	370,141	171,769	2,156,462	- 300,000	1,856,462

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Comparison of reducing the matrix funding and withdrawing funds from Schools Budget

	Pupils		Budget		Impact of reducing the ISB		Pupils on Matrix 6 and above	Impact of reducing matrix by a further £4,800		Difference between isb reduction and matrix reduction		Full year Matrix forecast for 2015/16
	Col A %	Col B £	Col C	Col D %	Col E	Col F £		%	Col G £	%	Col H £	
PRIMARIES:												
Adamsrill Primary School	557	3,229,333	-36,133	-1.1%	0	0	0.0%	-30,266	-0.9%	0		
All Saints' Church of England Primary School	211	1,034,250	-15,072	-1.5%	2	9,600	0.9%	-3,025	-0.3%	25,276		
Ashmead Primary School	275	1,550,636	-20,304	-1.3%	3	14,400	0.9%	-2,607	-0.2%	33,319		
Athelney Primary School	485	3,273,939	-5,853	-0.2%	0	0	0.0%	-4,903	-0.1%	40,500		
Baring Primary School	258	1,581,485	-8,635	-0.5%	3	14,400	0.9%	7,167	0.5%	41,873		
Brindishe Lee Primary School	283	1,487,990	-20,760	-1.4%	1	4,800	0.3%	-12,589	-0.8%	15,797		
Beecroft Garden Primary School	316	2,118,397	0	0.0%	3	14,400	0.7%	14,400	0.7%	41,073		
Childeric Primary School	434	2,868,318	0	0.0%	8	38,400	1.3%	38,400	1.3%	107,134		
Christ Church Church of England Primary School	235	1,502,718	0	0.0%	2	9,600	0.6%	9,600	0.6%	25,850		
Cooper's Lane Primary School	529	3,123,183	-33,491	-1.1%	9	43,200	1.4%	15,147	0.5%	116,841		
Dalmain Primary School	401	2,305,270	0	0.0%	1	4,800	0.2%	4,800	0.2%	15,797		
Deptford Park Primary School	656	4,289,835	-25,822	-0.6%	10	48,000	1.1%	26,371	0.6%	138,608		
Downderry Primary School	474	2,783,799	-9,751	-0.4%	2	9,600	0.3%	1,432	0.1%	22,056		
Edmund Waller Primary School	446	2,412,861	-34,317	-1.4%	1	4,800	0.2%	-23,945	-1.0%	16,311		
Elfrida Primary School	417	2,607,718	-5	0.0%	2	9,600	0.4%	9,596	0.4%	23,840		
Eliot Bank Primary School	512	2,680,475	-32,194	-1.2%	1	4,800	0.2%	-22,166	-0.8%	14,361		
Fairlawn Primary School	503	2,581,214	-37,183	-1.4%	4	19,200	0.7%	-11,945	-0.5%	53,137		
Forster Park Primary School	480	3,086,248	-38,378	-1.2%	8	38,400	1.2%	6,254	0.2%	103,053		
Good Shepherd RC School	256	1,429,326	-19,188	-1.3%	0	0	0.0%	-16,072	-1.1%	0		
Gordonbrock Primary School	575	3,126,488	0	0.0%	5	24,000	0.8%	24,000	0.8%	63,477		
Grinling Gibbons Primary School	277	1,835,175	0	0.0%	7	33,600	1.8%	33,600	1.8%	93,923		
Haseltine Primary School	458	3,058,395	0	0.0%	4	19,200	0.6%	19,200	0.6%	50,214		
Brindishe Green Primary School	653	3,928,247	0	0.0%	7	33,600	0.9%	33,600	0.9%	86,743		
Holbeach Primary School	481	2,868,214	-36,944	-1.3%	6	28,800	1.0%	-2,145	-0.1%	72,094		
Holy Cross Roman Catholic Primary School	236	1,314,485	-11,780	-0.9%	3	14,400	1.1%	4,533	0.3%	41,073		
Holy Trinity Church of England Primary School	193	1,171,309	0	0.0%	2	9,600	0.8%	9,600	0.8%	21,830		
Horniman Primary School	232	1,190,352	-17,858	-1.5%	1	4,800	0.4%	-10,158	-0.9%	10,915		
John Ball Primary School	497	2,477,833	-31,757	-1.3%	3	14,400	0.6%	-12,200	-0.5%	40,212		
John Stainer Primary School	311	1,716,085	-9,523	-0.6%	3	14,400	0.8%	6,423	0.4%	46,818		
Kelvin Grove Primary School	562	3,628,879	-39,581	-1.1%	8	38,400	1.1%	5,246	0.1%	97,658		
Kender Primary School	354	2,299,370	-6,246	-0.3%	0	0	0.0%	-5,232	-0.2%	0		
Kilmorie Primary School	472	2,589,331	-34,172	-1.3%	2	9,600	0.4%	-19,023	-0.7%	28,722		
Launcelot Primary School	430	2,624,078	-19,041	-0.7%	5	24,000	0.9%	8,051	0.3%	60,650		
Lee Manor Primary School	468	2,491,252	-35,590	-1.4%	5	24,000	1.0%	-5,811	-0.2%	62,903		
Lucas Vale Primary School	380	2,274,752	-30,653	-1.3%	2	9,600	0.4%	-16,076	-0.7%	21,830		
Marvels Lane Primary School	424	2,618,477	-20,489	-0.8%	4	19,200	0.7%	2,038	0.1%	47,680		
Myatt Garden Primary School	463	2,574,312	0	0.0%	5	24,000	0.9%	24,000	0.9%	63,477		
Our Lady and St Philip Neri Roman Catholic Pri	317	1,733,304	-23,583	-1.4%	2	9,600	0.6%	-10,154	-0.6%	21,830		
Perrymount Primary School	251	1,834,873	0	0.0%	3	14,400	0.8%	14,400	0.8%	36,191		
Rangefield Primary School	451	2,816,034	0	0.0%	2	9,600	0.3%	9,600	0.3%	27,286		
Rathfern Primary School	474	2,757,093	-34,198	-1.2%	5	24,000	0.9%	-4,645	-0.2%	68,933		
Rushey Green Primary School	555	3,441,555	0	0.0%	7	33,600	1.0%	33,600	1.0%	103,399		

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Comparison of reducing the matrix funding and withdrawing funds from Schools Budget

	Pupils		Budget		Impact of reducing the ISB		Pupils on Matrix 6 and above	Impact of reducing matrix by a further £4,800		Difference between isb reduction and matrix reduction		Full year Matrix forecast for 2015/16
	Col A %	Col B £	Col C	Col D %	Col E	Col F £ %		Col G £ %	Col H £			
PRIMARIES:												
Sandhurst Infant School	313	1,765,615	-21,179	-1.2%	2	9,600 0.5%	-8,140	-0.5%	25,276			
Sandhurst Junior School	324	1,832,013	-26,752	-1.5%	2	9,600 0.5%	-12,808	-0.7%	23,840			
Sir Francis Drake Primary School	200	1,340,216	0	0.0%	5	24,000 1.8%	24,000	1.8%	58,021			
St Augustine's Roman Catholic Primary School	226	1,268,388	-16,641	-1.3%	3	14,400 1.1%	461	0.0%	42,509			
St Bartholomew's Church of England Primary School	328	1,824,803	-27,628	-1.5%	3	14,400 0.8%	-8,742	-0.5%	50,265			
St James's Hatcham Church of England Primary School	217	1,333,495	-3,537	-0.3%	4	19,200 1.4%	16,237	1.2%	55,434			
St John Baptist Southend Church of England Primary School	212	1,174,431	-16,621	-1.4%	3	14,400 1.2%	478	0.0%	34,755			
St Joseph's Catholic Primary School	285	1,632,454	0	0.0%	1	4,800 0.3%	4,800	0.3%	14,361			
St Margaret's Lee CofE Primary School	220	1,231,596	-16,424	-1.3%	2	9,600 0.8%	-4,157	-0.3%	27,800			
St Mary Magdalen's Catholic Primary School	202	1,118,178	-5,151	-0.5%	3	14,400 1.3%	10,085	0.9%	42,100			
St Mary's Church of England Primary School	223	1,416,718	-16,082	-1.1%	0	0 0.0%	-13,471	-1.0%	0			
St Michael's Church of England Primary School	225	1,277,842	-17,835	-1.4%	2	9,600 0.8%	-5,339	-0.4%	23,840			
St Saviour's Catholic Primary School	225	1,311,656	-16,242	-1.2%	0	0 0.0%	-13,605	-1.0%	0			
St Stephen's Church of England Primary School	259	1,449,900	-14,126	-1.0%	3	14,400 1.0%	2,568	0.2%	34,755			
St William or York Roman Catholic Primary School	259	1,358,025	-18,375	-1.4%	3	14,400 1.1%	-991	-0.1%	39,633			
St Winifred's Catholic Infant and Nursery School	171	917,955	0	0.0%	0	0 0.0%	0	0.0%	0			
St Winifred's Catholic Junior School	170	901,553	-12,896	-1.4%	5	24,000 2.7%	13,198	1.5%	68,359			
Stillness Infant School	287	1,526,321	0	0.0%	0	0 0.0%	0	0.0%	0			
Stillness Junior School	336	1,721,437	-26,566	-1.5%	3	14,400 0.8%	-7,852	-0.5%	36,644			
Torridon Infant School	297	1,768,824	-23,409	-1.3%	1	4,800 0.3%	-14,808	-0.8%	10,915			
Torridon Junior School	388	2,201,027	-30,176	-1.4%	3	14,400 0.7%	-10,876	-0.5%	42,161			
Turnham Primary School	494	2,911,771	-31,515	-1.1%	1	4,800 0.2%	-21,598	-0.7%	10,915			
TOTAL PRIMARY	23,100	135,601,107	-1,029,656	-0.8%	200	960,000	97,536	0.1%	2,644,271			
SECONDARIES:												
Addey and Stanhope School	690	5,223,728	-64,318	-1.2%	9	42,944	-10,930	-0.2%	102,253			
Bonus Pastor Roman Catholic School	762	5,609,680	-85,229	-1.5%	17	81,344	9,954	0.2%	203,520			
Conisborough College	866	7,259,642	0	0.0%	13	62,400	62,400	0.9%	154,242			
Deptford Green School	859	7,314,029	-70,803	-1.0%	13	62,400	3,094	0.0%	161,086			
Forest Hill School	1,416	9,532,548	-126,613	-1.3%	21	99,776	-6,278	-0.1%	252,924			
Prendergast School	876	5,421,988	-61,843	-1.1%	4	19,200	-32,601	-0.6%	50,264			
Sedgehill School	1,405	9,934,176	-110,323	-1.1%	17	81,600	-10,809	-0.1%	210,929			
Sydenham School	1,327	8,722,911	-114,019	-1.3%	6	28,800	-66,705	-0.8%	75,254			
TOTAL SECONDARY	8,201	59,018,700	-633,148	-1.1%	100	478,464	-51,875	-0.1%	1,210,472			
ALL THROUGH SCHOOLS												
Prendergast Ladywell School	906	7,126,715	0	0.0%	7	33,600	33,600	0.5%	82,314			

Comparison of reducing the matrix funding and withdrawing funds from Schools Budget

	Pupils	Budget	Impact of reducing the ISB		Pupils on Matrix 6 and above	Impact of reducing matrix by a further £4,800		Difference between isb reduction and matrix reduction		Full year Matrix forecast for 2015/16
	Col A %	Col B £	Col C	Col D %	Col E	Col F £	%	Col G £	%	Col H £
PRIMARIES:										
Prendergast Vale School	686	4,967,916	0	0.0%	11	52,800		52,800	1.1%	128,905
Trinity Lewisham	647	5,377,375	0	0.0%	14	66,944		66,944	1.2%	161,754
ALL THROUGH SCHOOLS	2,239	17,472,005	0	0.0%	0	153,344		153,344	0.9%	372,973
Haberdashers' Aske's Hatcham College			0		24	115,200		70,036		256,020
Haberdashers' Aske's Knights' Academy			-53,919		16	76,800		12,569		161,090
Tidemill Primary School			-76,683		2	9,600		9,600		21,443
			0							
TOTAL ACADEMIES INCLUDED IN DSG CALCULATION			-130,602		42	201,600		92,205		438,553
TOTAL ALL			-1,793,406		342	1,793,408		291,210		4,666,269

Note - When reducing the schools budget there is a point reached when all schools are on the Minimum Funding Guarantee and no further reductions can be made. This point in the current year is a reduction of £1,585k. The above table implies in Column C that it can be reduced by £1,793k. This cannot happen, the figures are shown for comparative purposes only to compare with the change in funding on the SEN Matrix. The calculation had been achieved by taking the £1,585k reduction and proportionally increasing it to £1,793k.

Dedicated Schools Grant Budget Report 2015/16

1. Purpose of this Report

The purpose of this report is for Forum members to agree the Dedicated Schools Grant budget for 2015/16.

2. Recommendations

The Forum

- a) Note the current position on the DSG
- b) Agree to set next year's funding rates on the ISB at the same level as last year (2014/15)
- c) If the settlement is different from expected, then
 - i) any surplus should be added to the individual schools budget either through the
Basic Entitlement or
Free Meals or
IDACI indicators
OR
 - ii) any surplus should be added to the protection on the matrix.
OR
 - iii) The Forum meeting on the 5 February will consider the budget
- d) Agree with the continuation of each of the following projects that are funded through a top-slice from the DSG at the current level of funding
 - Management Support To PFI/New Schools With Major Capital Projects
 - New Woodlands Outreach
 - Tutors For Looked After Children - Year 6
 - Social Workers At New Woodlands / Abbey Manor College
 - Partnership Development
 - Additional Tutors For Looked After Children – Key Stage 3
 - Social Workers In Special Schools
- e) Agree a payment holiday on the contingency and not de-allocate the contingency fund for 2015/16 only.

- f) That the Collaborative SEN funding continues to be passed to banker schools.
- g) That the former Standards Funds Collaborative funding which is currently delegated to schools in the ISB formula and de-delegated under the heading "Contingency" is not de-delegated from the 2015/16 financial year, with the effect of leaving the funding within individual schools.
- h) By voting phase, agree the following budget for 2015/16 that will be de-delegated

Ref	Heading	Primary £'000	Secondary £'000
A	De-delegation for mainstream schools for Contingencies	0	0
B	Extended schools collaborative (contingency) allocation	0	0
B	Administration of free school meals	46	20
C	Staff costs – Supply Cover	594	206
D	Support for minority ethnic pupils/underachieving groups	112	48

- i) The forum agree to the follow budgets for central spend

Ref	Heading	Budget 2015/16 £'000	Budget 2014/15 £'000
A	Growth fund (to meet requirements for basic need and infant class size regulations)	1,800	1,793
B	Falling rolls fund for surplus places in good or outstanding schools where a population bulge is expected in 2-3 years	200	0
C	Admissions	604	604
D	Serving of Schools Forum	78	78
E	Capital Expenditure from Revenue	4,086	4,086
F	Contribution from combined budgets	903	903
G	Termination of employment costs	176	176

3. Budget Strategy

- 3.1 The longer term funding position remains uncertain, particularly with the general election being next May. Both of the main political parties are like minded in that they wish to see the national deficit eliminated. The only current difference between the parties is in the timescales by which this should be achieved.
- 3.2 The most likely scenario is that we will not see any growth in the DSG in Lewisham. Current funding for the schools block has been cash frozen although it has risen in line with pupil numbers. The high needs block has been cash frozen but there has been only a partial increase in funding for the growth in numbers. This trend is expected to continue for the foreseeable future. Although the DFE call for evidence on funding may help (see 4.9.3).
- 3.3 The national funding for the schools block will grow in 2015/16 but Lewisham will not receive any benefit from this as it is not defined by the Department for Education (DFE) as one of the lower funding authorities on a per pupil basis, which remains their priority. The DFE are starting to review the high needs of DSG. It is anticipated that again Lewisham will be regarded as a better funded Authority and unlikely to receive any extra funding.
- 3.4 As we have seen earlier on in the agenda the current financial forecasts show the high needs budget is overspending. The budget strategy has been focused on ensuring that special educational needs spending balances to the funds available while protecting the schools budgets as much as possible.
- 3.5 The medium term outlook from 2016 to 2020 discussed in section 5 of this report shows significant costs that are likely in the future, with the distinct possibility that there will be no extra funding. These costs will need to be managed but the focus of this paper will consider the savings needed to balance the DSG in 2015/16.
- 3.6 Financial overview

The DFE are likely to announce the provisional financial settlement for the Dedicated Schools Grant (DSG) around the 18th December 2014. This will cover the Schools block and Early Years block elements of the DSG. Usually the High Needs block is notified to Local Authorities in March. It is hoped for the coming year this will also be announced in December.

- 3.7 Current indications are that the Schools block is likely to be set at the same level as last year but adjusted for pupil number increases. It is thus assumed that the funding rate per pupil will stay at £5,950. The DFE have previously announced a national funding investment of £350m into the DSG which will be applied to those Local Authorities calculated by the DFE to have the lowest per pupil funding. Lewisham will not receive any of this funding.
- 3.8 The minimum funding guarantee is expected to stay at minus 1.5%. Early indications are that the pupil premium in Primary will rise by £20 to £1,320. The funding rates for the secondary and looked after children is not expected to change.
- 3.9 Participation Funding for two-year-olds
- 3.9.1 In 2015-16 initial funding for the two-year-old programme will be allocated to local authorities in June 2015 using the January 2015 census data. There will be a mid-year count in the autumn term to adjust funding in-year to reflect any significant increases in take-up of the entitlement. The additional data collection is not intended to fund on actual numbers, but allow an in-year adjustment to reflect major increases in participation rates in the first year the new funding mechanism.
- 3.9.2 Local authorities are expected to submit the additional data on a voluntary basis to avoid unnecessary burden. The initial 2015-16 funding allocation will remain the same if local authorities choose not to submit an autumn count.
- 3.9.3 In 2016-17 funding will be allocated on the same basis as for the three- and four-year-old entitlement, based on the January 2016 census.
- 3.9.4 As the DFE cannot confirm initial allocations for 2015-16 until June, they have published local authorities 2015-16 per child hourly rates for two-year-olds. The English average rate per hour is £5.09 and Lewisham's is £6.07 which is in line with other inner London borough's
- 3.9.5 With the funding moving to a participation basis and being based on the January 2015 census there is uncertainty of the exact level of funding until the count is complete.

Scenario	Children	Funding £'000
Worst case	1300	4,446
Most Likely	1650	5,643

This compares with funding of £6,928k in the current year

4. Post 16 funding

There will be no additional changes to the funding factors within the national funding formula for 2015/16. The EFA hope to provide stability in funding rates for 2015/16. They plan to confirm the national funding rate in January 2015, informed by final data on academic year 2013 to 2014 student numbers and early data on 2014 to 2015 academic year student numbers.

4.1 High Needs

4.1.2 The Department for Education are simplifying the process for allocating numbers of places to institutions for high needs students (students aged 16 to 19 and students aged 19 to 24 with an Education, Health and Care plan or Learning Difficulty Assessment) for 2015/16. They are using the place numbers allocated to institutions in 2014/15 as the basis for allocating place numbers in 2015/16. They plan to make final allocations of Dedicated Schools Grant (DSG) High Needs Block funding for financial year 2015 to 2016 to local authorities this December rather than, as last year, in March. The DFE believe this will give earlier certainty to institutions and local authorities on place funding and the amount of top-up funding available. This should enable earlier decisions on placing students and take account of their new rights to name a preferred post-16 institution as introduced by the Children and Families Act 2014.

4.1.3 For 2016/17, the DFE are considering whether they can move to a lagged system for allocating high needs place funding which the DFE believe will provide simplicity and certainty for institutions. However it would not reflect any year on year growth and it would be 2 years before we received the funding for such growth.

4.1.4 High needs formula review

The allocation of high needs funding to local authorities through the DSG is based largely on historical levels of expenditure in each area. The DFE want to move to a formulaic basis for distributing this funding in the future and have commissioned the Isos Partnership to carry out some research on the reasons for historical differences in the level of expenditure between local authorities. Following this the Isos partnership will consider formulaic approaches to the funding.

4.1.5 In order to help the process the Department for Education have made a call for evidence. This was issued on 13 November 2014. The closing date for the return is 27 February 2015. It is proposed that it initially the details of the return will be considered by the High Needs Sub Group before coming to the full Forum in February.

4.2 3 and 4 year old pupil premium

4.2.1 This will be implemented from April 2015 with a national hourly rate for the EYPP which local authorities must pay to providers. The initial allocation for Lewisham is £390k based on a Proxy FSM Numbers (PTE) of 1,294, which is £300 per pupil.

4.2.3 There will be a mandatory mid-year survey in the autumn to check take-up of the EYPP, and make adjustments to allocations in light of that.

4.2.4 There is a mandatory deprivation supplement in the Early Years Single Funding Formula. The DFE are trying to encourage local authorities to consider using their deprivation supplement to increase the local rate of Early Years Pupil Premium. This would result in other funding being reduced elsewhere in the DSG. Currently there has been insufficient time to give proper consideration to the impact of other reductions and the setting of priorities. If the Forum wish to consider this, officers could bring a report to a future meeting.

4.2.5 The DFE will extend the current Study of Early Education and Development (SEED) research to include an assessment of the impact of EYPP on the quality of early years settings included in the study. An interim report will be available in summer 2016. The DFE plan to conduct a survey of providers part way through the financial year to see how providers are spending their EYPP and to identify early evidence of impact.

4.3 Collaborative Funding

4.3.1 On the 19 June the Schools Forum discussed a proposal to pass Collaborative funding directly to schools rather than to Banker schools.

4.3.2 This was to simplify the current process. Under the current funding regulations there are a number of steps that are undertaken.

Step 1 – The funding is part of the ISB, so it forms part of the ISB Share calculations prior to the start of the year and is journalled to schools as part of the year's funding.

Step 2 – As a de-delegated item, schools are informed of the charges to bring this funding back to the centre prior to the start of the year with the journal being actioned once the year has started.

Step 3 – The Collaborative allocations for each school are calculated using the same data as the ISB. These individual allocations are aggregated to create allocations per Collaborative which schools are

notified of at the same time as their ISB share. These amounts are journalled to the banker schools early in the year.

Step 4 – The banker schools submit requests to the Schools Finance Team to transfer amounts from them to Collaborative members in line with decisions made by the members. The majority of schools receive the amount of funding that was their individual Collaborative allocation.

In short, for most schools we give the funding to the schools, take it away, give it to the bankers, take it away and give it to the schools.

- 4.3.3 The intention of the proposal was not to stop collaborative working as it allowed for funding still to be pooled if required.
- 4.3.4 The Forum asked that the matter be referred to Primary Strategic. There were mixed views over the proposals and the debate was similar to that at the forum. Some schools valued the funding and felt that it contributed to some good practice. Other collaboratives did not use the funding in this way but passed it back to schools. The main benefit was seen with the SEN collaborative funding and in particular the employment of staff in specialist areas such as speech and language therapists that allowed the resource to be shared amongst schools in the collaborative, that individually schools could afford.
- 4.3.5 There was no compelling evidence brought forward regarding the use of the former standards funds grants.
- 4.3.6 Some schools felt that the funding was the mechanism by which the collaborative working was being held together. There was a general view the collaborative working was part of good practice and that examples of good practice should be provided to help the collaboratives to continue to develop.
- 4.3.7 Lewisham currently has the largest contingency of all the Local Authorities across the country. This is partly due to the former standards funds collaboratives funding being held in the contingency. If this was not the case our current average contingency per pupil would fall from £76 to £38 per pupil. The average across the country for the contingency is £5 per pupil.
- 4.3.8 It is proposed that the SEN Collaboratives funding still continues to operate in its current form and that the Collaborative funding held for the former standard funds be left within individual school budgets.

5.0 Medium Term Financial Issues

The position of next year's funding will become clearer after the announcements on the DSG settlement in December. The longer term

funding position remains uncertain particularly with the general election next May. Both of the main political parties are like minded that they wish to see the national deficit eliminated. The only current difference between the parties is the timescales by which this should be achieved. The most likely scenario is we will not see any growth in the DSG.

5.1 Rates bill

The next general revaluation of the school estate will take place in 2017. With the expansion of schools places it is likely that there will be increases in the funding requirement. Any extra funding will need to be found within the DSG. It is estimated this will be an extra £600k.

5.2 New schools – Secondary places

As the pupil bulge in Primary works its way through to secondary, it is expected that Lewisham will need additional secondary places which would equate to an extra 10 FE by the end of the decade, with further demand forecast into the early part of the next decade. The local authority is in discussion with a number of schools concerning the potential for expansions. Initial planning is also underway for a new secondary school. The revenue impact of this new provision will need to be factored into the DSG budget

The current projected school numbers are as follows

Forecast Year	R	1	2	3	4	5	6	Total
Primary								
2015/16	3,946	4,017	3,751	3,753	3,565	3,426	3,227	25,685
2016/17	3,891	3,985	4,020	3,715	3,742	3,565	3,430	26,348
2017/18	3,923	3,937	3,995	3,987	3,708	3,749	3,577	26,876
2018/19	4,001	3,977	3,955	3,971	3,991	3,724	3,764	27,383
Forecast Year	7	8	9	10	11	12	13	Total
Secondary								
2015/16	2,548	2,455	2,285	2,345	2,415	997	748	13,793
2016/17	2,731	2,583	2,486	2,323	2,287	1,128	751	14,289
2017/18	2,910	2,776	2,624	2,536	2,274	1,078	856	15,054
2018/19	3,041	2,970	2,832	2,688	2,493	1,085	832	15,941
2019/20	3,184	3,075	3,000	2,871	2,614	1,160	811	16,715
2020/21	3,148	3,220	3,107	3,042	2,793	1,216	867	17,393

The amount needed to be set aside will depend will depend on the provision that is set up. As schools' funding is based on previous years pupil numbers the schools income is much lower than the running costs. In order for the school to operate extra funding is provided from a contingency.

It is estimated for a new school £250k per annum will be needed

5.3 SEN numbers pressures with little likelihood of additional funding

Current pupil numbers are growing in the primary age group by 3.3%, in the secondary age groups the numbers are growing but by 1.2%. The current system of funding high needs pupils is such that funding does not grow in line with the growth in numbers. There is a bidding process that Local Authorities are expected to participate in to see if any extra funding should be provided.

With the growth in numbers, if the cost is not managed this equates to £1.2m a year which with the current funding arrangements, would have to be funded from DSG funds for schools

5.4 New responsibilities to age 25

Local authorities must set out in their Local Offer the support and provision that 19- to 25-year-olds with SEN can access regardless of whether they have an EHC plan (see Chapter 4, The Local Offer). Further education colleges must continue to use their best endeavours to secure the special educational provision needed by all young people aged 19 to 25 with SEN attending their institution.

19- to 25-year-olds with EHC plans should have free access to further education in the same way as 16- to 18-year-olds. Colleges or training providers must not charge young people tuition fees for such places as the funding will be provided by the local authority and the Education Funding Agency (EFA).

5.5 Medium term financial issues – financial impact

	2016/17	2017/18	2018/19	2019/20
	£'000	£'000	£'000	£'000
Business Rates		600		
New Secondary Places		150	250	400
High Need pupil growth	1200	1200	1200	1200
Extending the age of SEN children to 25	200			
Total	1400	1950	1450	1600

6 Funding Blocks

6.1 The estimated level of DSG for 2015/16 and its three constituent blocks are shown below.

6.2 School Block

6.2.1 The total increase in pupil numbers are as follows

	Oct-13	Oct-14 (est)	Change	
Primary	22,155.50	22,893.00	737.50	3%
Primary Academy	1,145.50	1,158.00	12.50	1%
Secondary	8,672.50	8,783.00	110.50	1%
Secondary Academy	2,011.00	1,962.00	-49.00	-2%
Jan Uplift*1	57.00	45.00	-12.00	-21%
SEN Units	- 184.00	- 186.00	-2.00	-1%
Total*2	33,857.50	34,655.00	797.50	2%
Newly Transferred Academies	-	1,313.00	1,313.00	
Total*3	33,857.50	35,968.00	2,110.50	6%

6.2.2 This table now includes pupils at St Matthew Academy. This will ensure that all academies are funded through the DSG. In the 2014/15 settlement this was not the case. The DFE have yet to confirm the exact funding arrangements as academies brought into the DSG this year are funded on estimated numbers. There are also issues regarding the growth funding and SEN for these schools that still have to be confirmed. The table also includes the pupil numbers at Haberdashers' Aske's Hatcham Temple Grove Free School, which also moves into the DSG calculation.

- 6.2.3 If the pupils at St Matthew Academy and Haberdashers' Aske's Hatcham Temple Grove Free School are discounted then the underlying increase in pupil numbers for next year is expected to be 797.5 or a 2% increase.
- 6.2.4 Including the pupils at St Matthew's Academy the increase in pupil numbers will equate to extra resources of £12.5m, it is estimated that the overall level will be £281.1m. If the academy adjustment is excluded the underlying increase is estimated to be £5.0m.
- 6.2.5 The schools funding formula has now been re-worked with the latest available data. The data for the 2014/15 allocation will be provided by the DFE and is expected to be available on the 9 December. Which is of course after these papers are published. In order to calculate the likely impact on school budgets, the October 2013 census roll numbers have been used. This is of course still subject to checks by the EFA and possible alterations, but gives the best guide to the likely impact on individual schools funding.
- 6.2.7 In summary this would result in the following changes to school budgets between 2014/15 and 2015/16.

Change in funding as a percentage of budget (ISB Formula Plus MFG)			Number of schools	
			Gaining	Losing
over	8%	9	0	
6% to	7.99%	2	0	
4% to	5.99%	4	4	
2% to	3.99%	10	5	
0% to	1.99%	22	22	

The funding per school will be tabled at the meeting.

- 7.0 Reserve date
- 7.1 The dates by which school budgets must be notified to schools is February 28th for mainstream schools and March 31st for Special Schools and PRU's. 6th form funding is excluded from this requirement; the EFA normally notify schools and LAs of this at the very end of March.
- 7.2 The new funding system has a greater degree of uncertainty for the Forum as the budget needs to be set before the funding announcements. In the past the Forum have always considered the budget in late January or early February. It is proposed that if necessary the meeting of the Forum on the 5 February be reserved in case there is a significant difference in the settlement figures and the

Forum needs to discuss the budget. This is despite the fact this is after the return date the DFE have set.

7.3 There is the potential that when the final settlement is provided by the DFE it will not be in line with the forecasts. This could mean that there additional resources or a shortfall in funding. If there are additional resources there are generally two choices; either to add the funding to the basic entitlement or add the funding to the free meals / IDACI indicators.

7.4.1 For example, if the settlement is £500k higher than expected this would mean the funding rates would have to change by –

	Primary Rates		Secondary Rates	
Basic Entitlement	0.33%	£12.33	0.33%	£17.05
FSM Ever 6	2.74%	£30.27	2.74%	£40.70
IDACI	11.12%	£13.57	11.12%	£23.93

7.4.2 The impact on individual schools of applying a £500k increase to the Basic Entitlement is shown below.

Distributing £500k Via Basic Entitlement				
Primary School		Secondary School		
210 Pupils	400 Pupils	850 pupils	1200 pupils	
£	£	£	£	
Funding Increase	2,589	4,932	14,492	20,460

7.4.3 If the £500k were to be allocated via the FSM Ever 6 or IDACI allocations, the results would be as follows.

Distributing £500k Via				
FSM Ever 6		IDACI		
Primary	Secondary	Primary	Secondary	
£	£	£	£	
Mid-Point Allocation	3,306	17,079	3,611	17,705
50% Of Schools	2,185 and	13,095 and	2,539 and	16,707 and
Between	5,662	18,900	5,223	19,009
Minimum Allocation	219	8,064	1,161	9,614
Maximum Allocation	11,232	24,008	8,883	21,988

- 7.4.4 The Forum have a number of choices if this scenario happens, they could either decide today to
- Allocate it in a set way (i.e. basic entitlement / free meals / IDACI)
 - Add the funding to the collaborative SEN funds to offset the proposed reduction of £300k.
 - The Forum reconsider the budget at the next scheduled meeting on the 5 February
- 7.4.5 This date would of course be after the deadline for submitting the return on the final school budgets to the DFE (20 January 2015), but an earlier date would not allow officers to calculate the impact and to meet the requirement to publish the reports a week before the meeting.
- 7.5 If the settlement is lower than expected then two choices would exist, the funding could be withdrawn from schools or taken from the high needs block. If it is taken from schools the minimum funding guarantee would act in a way whereby some schools could see large reductions and other schools none at all. The High Needs block is also under severe budgetary pressure and any decision would need careful modelling and consideration.
- 7.6 If a reduction does occur it would seem necessary to use the meeting on the 5 February to consider the exact position rather than consider all the permutations in this paper.

8 Early Years Block

- 8.1 The Early Years Block allocations published in December 2014 are expected to be based on January 2015 census counts. They will be adjusted in summer 2015 based on counts from the January 2015 School Census, Early Years Census and Alternative Provision Census.
- 8.2 These allocations will then be adjusted a further time in 2016. Pupil counts taken from the January 2016 censuses will be weighted with the counts taken from the January 2016 censuses in a 7:5 ratio.
- 8.3 The result will give the final Early Years Block allocations for financial year 2015-16. There will be element of judgement in making the forecast for this income but provisionally the figure has been calculated at £15.8m. Which compares with £16.9m in 2014/15. This funding will be used to fund allocations to providers of the 3 & 4 year old free entitlement.

9 High Needs block

- 9.1 This is being discussed in a separate item on the agenda. The forecast of the funding available has been set at this year's level. This assumes

the Forum agrees the recommendations from the High Needs Sub Group on the High Needs Funding considered under Item 3 of this meeting.

10 Overall change in the DSG

In summary the following assumptions have been made.

Funding block	Change
Schools	+£ 5.0m
Early years	-£ 1.1m
High needs	£ 0

11 Headroom Projects

- 11.1 Over the last three years the Forum have considered requests to use the Dedicated Schools Grant to fund specific high profile projects. It was always intended that they should be reviewed regularly. These projects now need the agreement of the Forum to continue for next year. In summary the headroom projects are as follows. More details of these projects can be found in Appendix C.

Approvals from 2007/08	£k	Appendix Ref
Management support for capital builds	410	A
New Woodlands Outreach	160	B
Total	570	

Approvals from 2008/09	£k	
Tutors for Primary LAC	100	F
Social Workers at New Woodlands / Abbey Manor College	90	D
Partnership Development	115	C
Total 2008/09	305	

Approvals from 2009/10	£k	
Tutors and Support for Key Stage 3 LAC	100	E
Social Workers - Support Services in schools	100	
Total	200	

12 Budgets Requiring Schools Forum Approval

- 12.1 Members will recall that as part of the introduction of the national funding reforms there were changes to the rules governing the voting procedures. These particularly concerned the voting on the budget report.
- 12.2 The main change related to de-delegation of budgets where the voting was split between the primary and secondary phases of schools' members (these being Headteachers and Governors). Academy and Special School representatives are not part of this vote as de-delegation is not permitted for these school types.
- 12.3 The powers of the Forum also changed and it is now the role of the Forum to decide some budget levels rather than advise the Local Authority. Some of these budgets have to be decided individually. The budgets where the Forum decides are shown in Appendix B. The remaining budgets have to be agreed by the Mayor and Cabinet.
- 12.4 It is proposed to keep the budgets as the same as last year apart from two. Firstly the contingency, which is discussed below and secondly the administration of free school meals. This was discussed at the last meeting of the Forum where proposals were put forward and agreed to increase the charge by £40k.
- 12.5 In considering the Collaboratives Funding under item 4.11 of this report it was highlighted that Lewisham has the highest contingency per pupil in the country. This is partly due to the former standards funds given to schools being held in the contingency before it is passed the collaboratives bank schools. If this excluded Lewisham's contingency per pupil is £38, this compares with the national average of £5. If we were to lower our contingency to this level it would stand at £200k.
- 12.6 We have seen in the budget monitoring paper that the call on the contingency for rate re-valuations is about £500k. A contingency set at the national average of £200k would seem low.
- 12.7 Last year (2013/14) the contingency was not fully used and £1.3m was set aside. It was agreed that this would be used to offset the rate revaluations cost. This year another contingency provision of £1.3m has been set aside which currently has not been used.
- 12.8 The contingency is termed a delegated item. It is given to schools within their delegated budget and then the Forum approve whether it is managed by the Forum as a mutual fund. If this practice continues next year the charge to schools would again be £1.3m.

12.9 With the level of the mutual fund currently stand at £2.1m. (£0.8m from 2013/14 and £1.3m from 2014/15) it would seem unnecessary to ask schools to de-delegate a further £1.3m in 2015/16, especially as little of the contingency has been used. It is recommended that a payment holiday for schools is given for 2015/16 only and no charge is made. This will be reviewed for the 2016/17 budget when further work will have been undertaken on the budgetary pressures between 2016 to 2020 and the funding reviews on New Woodlands and Abbey Manor College are complete.

13 Conclusion

- 13.1 With the timetable as it is, there are many assumptions that have been built into the report. The true picture will only be known once ministers have finalised the settlement. This is expected a few days before Christmas and leaves little time for reports to be prepared, the papers to be published, the Schools Forum to meet and the political process to be undertaken within the 20 January deadline.
- 13.2 The position being such and with the nature of public finances, some of the assumptions maybe prove incorrect. It is thought appropriate to set aside some reserve dates to reconvene the Forum.

Management support for capital builds

Since 2007/08 this funding has supported the additional costs to schools associated with the planning and delivery of major capital projects, beyond those that can be accommodated through a school's own budgets.

In the large majority of schools eligible to be considered for additional funding, the core of the support has been funding for additional management time, usually a 0.5 member of the senior leadership team. This has proved invaluable in helping schools to continue to focus on their core business – learning and teaching – whilst undertaking the onerous and complex operations involved in planning and delivering a major capital project. Whilst there is a significant amount of management time given by contractors and the LA, projects cannot be delivered at the right quality without full engagement of school management and governance.

In addition, some schools, in particular those that require a site decant, incur additional costs which can not be met from their budgets. Examples of this are bussing costs and the additional transport and booking costs which have been incurred by schools which have had to rearrange their sports provision. This funding has enabled these sorts of additional costs to be met.

The schools that will have benefitted from this funding over the last two years are as follows (2014-15 subject to confirmation):

	2014-15 £000	2013-4 £000
Adamsrill Primary	30	35
Beecroft Garden Primary	20.5	0
Brindishe Green Primary	3	0
Coopers Lane Primary	50.8	20.5
Edmund Waller Primary	0	10
Forster Park Primary	0*	35
Haseltine Primary	21	0
Holbeach Primary	26.8*	5
John Ball Primary	47.2	17.5
John Stainer Primary	40.8	29.2
Rushey Green Primary	30	35
Sir Francis Drake Primary	30	17.5
St George's CE Primary	20.4	0
Trinity Primary	0	32.3
Sydenham	50.5	56.5
Prendergast Ladywell Fields	51	35
Drumbeat Brockley Special	0	17.5
Brent Knoll Special	2.7	35
Total	425	381

* These schools are receiving other school-managed support from central services

The budget for 2013/14 was £450K, reduced in 2014/15 to £425K.

The following schools would be eligible for support for all or part of 2015/16 because of ongoing major capital projects:

	Planned Completion Date
Adamsrill	2015
Coopers Lane	2015
John Ball	2015
John Stainer	2015
Prendergast Ladywell Fields	2015
Sir Francis Drake	2015
Holbeach	2016
St George's	2016
Sydenham	2016

A number of other schools will also have major capital builds involving delivery and/or design during 2015/16, subject to funding, governor approval and mayoral approval. Funding requirements are forecast and predicted to be at the same level as 2014/15 when the total budget is likely to be spent.

New Woodlands Outreach - Evaluation and Analysis of Service

Overview of Data

1. Number of pupils Outreach service works with in mainstream school: varies between 351 and 268 over the past 4 years
2. Outreach have worked with 318 girls over the past 4 years = average of 80 girls per year
3. In 2012-13 of the 367 pupils Outreach worked with 283 were NOT referred to New Woodlands, 45 were referred to NW for a place. 36 pupils Outreach worked with who were integrating into mainstream from NW and 3 pupils Outreach worked with as part of their Y6 transition from NW
4. In 2012-2013 Outreach worked with 221 primary pupils and 146 secondary pupils
5. Of pupils who came to NW from mainstream:
 - Primary**
 - 46% had worked with Outreach at Primary
 - 43% HAD NOT WORKED WITH Outreach
 - 11% came from out of borough
 - Secondary**
 - 48% pupils had worked with Outreach
 - 46% had not worked with Outreach
 - 6% pupils had worked with Outreach as part of their Y6 transition
6. At primary 83% pupils integrating received Outreach support
7. At secondary 67% pupils integrating received Outreach support
8. **IMPACT**
 - 2012-2013: 96% schools judged Outreach had improved the behaviour of the pupils they worked with
 - 2011-2012: 96% schools judged Outreach had improved the behaviour of the pupils they worked with

- 2010-2011: 90% schools judged Outreach had improved the behaviour of the pupils they worked with

Percentage Pupils that Outreach worked with who were NOT referred to NW for a placement

- 2012-2013: 86%
- 2011-2012: 88%
- 2010-2011: 88%

Percentage PRIMARY Pupils that Outreach worked with who were NOT referred to NW for a placement

- 2012-2013: 80%
- 2011-2012: 95%
- 2010-2011: 90%

Percentage SECONDARY Pupils that Outreach worked with who were NOT referred to NW for a placement

- 2012-2013: 80%
- 2011-2012: 76%
- 2010-2011: 84%

OUTREACH MAINSTREAM SCHOOLS OVERALL SATISFACTION
2011-2012

- 100% primary & secondary schools felt the Outreach service was good or excellent
- 92% schools felt Outreach provided an excellent service
- 8% schools felt Outreach provided a good service

2010-2011

- 98% primary & secondary schools felt the Outreach service was good or excellent
- 77% schools felt the Outreach service was excellent
- 21% schools felt Outreach service provided a good service
- 2% schools felt the Outreach service was satisfactory

2009-2010

-
- 75% schools felt the Outreach service was excellent
- 23% schools felt Outreach service provided a good service
- 2% schools felt the Outreach service was satisfactory

Partnership Funding

The Local Authority has continued to develop school partnerships as an effective school improvement strategy. Where partnerships are set up with schools that require a recovery programme, there are often additional leadership and other related costs to ensuring progress at pace. Over time, these costs diminish and /or are built into the partnership schools' budgets.

The schools that this funding has supported (or due to be supporting) since September 2011 are as follows:

Athelney & Elfrida
Rangefield & Forster Park
Good Shepherd & Our Lady and St Philip Neri RC Primary School
Holbeach & Edmund Waller
Coopers Lane & Launcelot
St John the Baptist & St Mary's
Grinling Gibbons / Lucas Vale Federation & Adamsrill

There are some partnerships that have been set up that have not accessed any additional funding as they have not involved schools causing concern.

As capacity has decreased so has the number of partnerships however there is now no funding that can be drawn on from the school improvement team and so this funding remains vital.

Social Worker post at Abbey Manor College

Having a full time Social Worker onsite between the Broadoak and John Evelyn Campuses of Abbey Manor College has proven to be extremely beneficial for students and staff.

There is a high level of need amongst the students and the personal circumstances of many students places them at risk of varying degrees of harm, including, in some cases, risk of significant and immediate harm.

Previous Social Workers at the College have supported students and families with issues ranging from sexual exploitation of underage girls, neglect, physical and sexual abuse, substantial and long term mental health needs and other issues. Having a Social Worker on site has allowed these issues to be identified and dealt with rapidly with a coordinated approach between the College and Children's Social Care.

Having a Social Worker on site helps prevent some issues escalating as they can be picked up and acted on prior to reaching crisis point. Furthermore, students benefit from seeing the Social Worker as a member of the College team, this has helped them feel confident and comfortable seeking support with needs that would not yet have met thresholds for Social Care intervention, but which nevertheless required the specialist knowledge and support of a social care professional. This has been especially useful with regards to links with other partner services, such as CAMHS and Early Intervention Team.

Abbey Manor College receives new students throughout the year. Many of our current and new students are affected by a range of vulnerabilities and social disadvantage, as such serious social issues can and do present themselves at any time. In addition to dealing with these directly an onsite Social Worker has been invaluable to advise, inform and directly support teaching and other staff at Abbey Manor College.

A joint working approach between the College and Social Care, as embodied in the role of an onsite Social Worker, has proven successful in helping our students with the highest level of social need. It has added to the College's capacity to employ a systemic approach to supporting our vulnerable students, by having another qualified professional who can explore all of the factors placing a child at risk, and therefore informs the way the College as a whole supports that child.

KS3 Tuition Report

Support offered

KS3 Tuition support has now moved to focus on primary to secondary transition, with all year 7 LAC being the focus group for targeted support during this time. This arose from the increase in exclusions at the beginning of the year for some of our year 7 LAC.

The target for tuition is successful secondary transition as described in DFE guidelines:

We have explored these factors during the LACs and PEPs, and tutors and mentors have been working with their young people to focus on these.

Role of Coordinator

Tutors are offered to all Year7 LAC and supported by an introductory meeting, arranged through the coordinator. All LAC are provided with 'Sussing out Secondary School' workbooks to use with their tutors. They are part of the Letterbox scheme and receive a range of books and activities throughout the year for use with their tutors

The coordinator supports through visiting schools and attending PEPs, TAC meetings and Professionals' meetings which are called when a child is at risk of exclusion or is in need of early intervention.

Specifics

26 LAC in the 2011 – 2012 cohort and 21 in the 2012-13 cohort

2011/2012 cohort

3 of these LAC do not have a tutor. The reasons are:

- a) Has adequate support at an SEN school. Anger issues make one to one sessions too risky
- b) Deemed inappropriate as she has a statement and is coming to terms with this support.
- c) Has adequate support in an SEN school.

In summary:

For this cohort 29 levels in English and Maths either remained constant or rose during the tutoring period. As there is often a dip in these levels on transition this data, taken together with the high level of smooth transitions, shows a pleasing level of success for the tutoring programme..

Data and notes are attached for 2011-2012 cohort.

2012/2103 cohort

Similar data is not yet available for the 2012 -2013 cohort.

Notes are attached for 2012-13 cohort but the end of year teacher assessments have not yet been collected.

Support and Intervention LAC Primary - 2012-2013

Year 6 Tuition

Tuition focus was placed on Y6 to coincide with their secondary school selection and transition. All 20 children were offered tuition via their primary school, who are best placed to provide SMART targets for the individual child. The programme covered a period of 2 hours per week for a period of 20 weeks, which aimed to provide tuition in both literacy and numeracy. Levels were collected at the start and end of the project in order to monitor programme success. School was also encouraged to provide feedback relating to the success of the programme and the benefit experienced by the child.

Where school tuition was not an option, home tuition was offered using tutors via Reed Global, again, targets set by school were passed onto the tutors to help inform planning. Weekly reports were collected and monitored. Copies of these reports were sent the child's social worker and copied to the child's file.

As part of our targeted focus on year 6, I was able to attend their PEPs which gave opportunities to discuss secondary school options, be involved in transition planning with school and foster carer and monitor overall progress to adjust the level of support being provided.

	NC Levels at start of programme	SATs Results	Sub Level Increase	Was the NC expected 4B reached?
DB	4B Maths, Literacy 4C	4B Maths, 5B Reading, 5 Grammar	4 sublevel increase in Literacy	Y
JK	P2 Maths & Literacy		Attends special school, Severe medical issues not able to sit SATs	
AN	4C Maths, 3C Literacy	5B Maths, 4C Reading, 4B Grammar	4 sublevel increase in maths, 3-4 sublevel increase in Literacy	Y
NM	3C Maths, 2A Literacy	4b Maths, 3b Reading, 3b Grammar	4 sublevel in maths, 2 sublevels Literacy	In Maths
* CC Female	3C Maths & Literacy	4B Maths & Reading, 3B Grammar	4 sublevels in maths and reading.	Maths & Reading
JH	P7 Maths, P5 Literacy		Attends special school. SATs not	

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			taken	
CM	P8 Maths, P7 Literacy	2B Maths, 1B Reading & Grammar	5 sublevel increase in Maths, 2 sublevels in literacy.	
RG	3A Maths, 4C Literacy	4B Maths, Reading & Grammar	2 sublevel increase in Maths, Reading & Grammar	Y
JP			SATs not taken, no previous levels	
TO	3C Maths, 3A Literacy	4B Maths, 3B Reading – No grammar level?	4 sublevel in Maths	In Maths
CC Male	2C Maths, 1C Literacy		SATs not taken	
** AS	2B Maths, 3B Literacy	4B Maths, 5B Reading, 4B Grammar	6 sublevel increase in Maths & Reading	Y
N W-C	4B Maths, 4C Literacy	4A Maths, 5C Reading, 3B Grammar	1 sublevel Maths, 3 sublevels Reading	Y
RC	2B Maths & Literacy	3C Maths, 4C Reading, 3B Grammar	2 sub levels Maths, 5 sub levels Reading	
JS	2C Maths, 2 Literacy		SATs not taken,	
CS	3C Maths, 2B Literacy	3A Maths, 3B Reading, N Grammar?	2 sub levels Maths, 3 sub levels in Reading	
RP	3A Maths, 4C Literacy	3B Maths, 4B Reading, 4 Grammar	1 sub level increase Reading.	Reading
V T	3C Maths & Literacy	4B Maths, Reading & Grammar	4 sublevel increase, Maths, Reading & Grammar	Y
AK	4C Maths, 4B Literacy	5B Maths, 4B Reading & Grammar	4 sub levels Maths	Y
AM	5C Maths, 5B Literacy	5B Maths, 5A Reading & Grammar	1 sub level Maths & Literacy	Y

* CC – started this school in Y3 with the following levels – writing P8, reading P8, maths 2C, Salford reading age 6.2. Ed LAC provided funding for extra tuition via school from Y3 through to Y6. This child achieved 4B Maths and Reading in her SATs, with a **4 sub level** increase in her last year.

** AS – Started this school in T3, Y4 with the following levels – writing 2C, reading 3C maths 2B, spelling age of 5yrs. Ed LAC provided funding for extra tuition through to Y6. In his SATs, this child achieved 4B Maths, 5B Reading, 4B Grammar with a **6 sub level** increase in his last year.

Attending PEPs:

Allocated hours for the role of Education Coordinator for LAC Primary was increased from 17.5 hours to 24.5 hours (this ended in August 2013). This allowed for 23 PEPs/TAC Meeting to be attended between April 2013 and July 2013. The support we give at PEP meetings helps to improve the overall quality, it also empowers the SW in the world of education which they still feel slightly out of their depth with. attending PEP meetings for year 5/6 also allows for early intervention with school selection and transition programmes, either by the primary school or secondary.

From September 2013, hours have decreased back to 17.5 hours which has allowed 4 PEPs/TAC meetings to be attended between September 2013 to October 2013. These have been in relation to children who are experiencing specific issues, i.e. sexualised behaviour, support for child with pathological demand avoidance, which also includes looking for a provision that can meet her needs, attendance at a PEP on the request of the IRO – during this meeting it transpired that no secondary placement had been looked at for this child who has a statement and we were two weeks away from the deadline.

Year 6 Transition

PAN London Meeting was held in September with invitations sent to all foster carers with children transitioning to secondary school in 2014. The meeting focuses on the secondary admission system, online applications and supporting letters from the child's SW which must accompany the application. An open floor discussion is encouraged around school selection based on the child's needs. This year we had a social worker who talked briefly to the carers and carers who had also been through the process before.

This meeting was followed up by the distribution of spreadsheet to SW, TM and SM, detailing all children transferring to secondary in September 2014. Also asked SW to work with FC to ensure that the most suitable school is selected to meet the individual needs of the child and for this decision to be recorded on ICS with the reason for selection. A template of the supporting letter which must accompany the application forms was also sent to each SW.

Secondary Deadline 31.10.13

On 30.10.13 I checked that an application form for each child transitioning to secondary had been completed and that a supporting letters from the SW had been provided, this was done by calling every FC. This proved useful as two children were without a secondary application and two supporting letters were also not provided. I was able to resolve both these issues with the help of our

admissions team who helped to ensure that both applications were entered onto their system.

Invitations to the secondary transfer meeting were sent out in July to FC and templates/list of children transferring was sent to SW early September.

Applications for Nursery Places

This was new this year. I was able to contact the SW of each of these children to discuss applications for nursery places and give advise as to the type of provision that could be used for our LAC. Again, we experienced issues with applications not being made in time to secure the nursery of choice rather than what was left (usually private provisions)

Central funds to be approved by the Forum

Budget	Sector	£'000	Brief description
Contingency	Total	0	The general contingency is allocated out to schools when an unexpected event occurs that has a significant financial effect that it would not be possible for the school to manage the financial consequences of, without causing damage to curriculum delivery.
	Prim	0	
	Sec	0	
Falling Rolls Fund	Total	200	Falling rolls fund for surplus places in good or outstanding schools where a population bulge is expected in 2-3 years
	Prim	0	
	Sec	200	
Free School Meals Eligibility	Total	66	This is the funding for officers who check whether a pupil is entitled to a free meal.
	Prim	46	
	Sec	20	
Staff Costs - Supply Cover	Total	674	This provides financial support to schools to help them meet the cost to schools of maternity leave and public duties
	Prim	468	
	Sec	206	
Staff Costs – Trade Unions	Total	126	This budget allows trade union officials to be employed to work on behalf of school staff to manage collective agreements. This supports the management of employee relations.
	Prim	88	
	Sec	38	
Support For Minority Ethnic Pupils Or Underachieving Groups;	Total	160	The current funding supports the 'Lens' groups and the Pupil Ambassadors programme (including the Awards ceremony) and also covers some development work on links with Oxbridge, career aspiration, the lecture series and other partnerships.
	Prim	112	
	Sec	48	

The following budgets are treated as central spend and need Schools Forum approval.

Budget	Sector	£'000	Brief description
Growth Fund	Total	1,800	Funding for schools undergoing temporary or permanent expansion in places.
Admissions		604	This budget covers the cost of the team that co-ordinate the admissions and appeals for Lewisham. The budget has been set at 2013/14 levels
Servicing Of Schools Forum		78	This budget covers the officers' time in preparing and attending the Schools Forum

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			and its sub-groups. This has been set at the 2013/14 level.
Capital Expenditure From Revenue		4,086	This covers the cost of the PFI / BSF contribution, support to the capital works within schools, the headroom bid for support to schools to implement capital works (see Appendix A(A)) and a proportion of costs of the estates management team. This has been set at the 2013/14 budget level
Contribution From Combined Budget		903	<p>The budget has two elements</p> <ol style="list-style-type: none"> 1. The cost of outreach work at New Woodlands Special School (which includes £160k of headroom funding). 2. Partnership funding, which is a headroom bid. <p>This budget has been set at 2013/14 levels</p>

MAYOR AND CABINET (CONTRACTS)			
Report Title	Estate Management Unit – Schools Minor Works Contracts 2015		
Key Decision	Yes	Item No.	
Ward	All		
Contributors	Executive Director for Children and Young People, Executive for Resources & Regeneration and Head of Law		
Class	Part 2	Date:	3 December 2014

Exclusion of the Press and Public

It is recommended that under Section 100 (A)(4) of the Local Government Act 1972, the public be excluded from the meeting during discussion of this item because it involves the likely disclosure of exempt information as defined in paragraph 3 of part 1 of Schedule 12A of the Act as set out below and the public interest in maintaining the exemption outweighs the public interest in disclosing the information.

- Information relating to the financial or business affairs of any particular person (including the authority holding that information).

1. Summary

- 1.1 This report sets out the key factors for consideration in agreeing planned maintenance works for the schools estate. It provides a list of proposed projects, based on need and supported by condition surveys, that can be delivered in the summer of 2015 and therefore having no or minimal impact on the schools.

2. Purpose

- 2.1 To secure approval to the list of proposed projects utilising a sum of £1.6m from the Dedicated Schools Grant Capital Expenditure from Revenue Account (CERA).

3 Recommendation/s

Mayor and Cabinet (Contracts) are recommended to:

- 3.1 Agree an allocation of [REDACTED] from the Dedicated Schools Grant CERA for the delivery of the schools minor works programme in 2015/16.

- 3.2 Agree the Schools Minor Works Contract schemes as detailed in Appendix A of this report at a total cost not exceeding £1.6m
- 3.3 Agree that works set out in the reserve list are tendered to determine whether further works could be procured through potential economies of scale.
- 3.4 Delegate authority to the Executive Director for CYP to progress the formal Council approvals for the works detailed at 6.4 and 6.6.
- 3.5 Delegate authority to the Executive Director for CYP to explore the potential to combine the 2015/16 Schools Minor Works Programme alongside identification of energy efficiency works in schools through the RE:FIT Schools Programme

4. Policy Context

- 4.1 The Local Authority has a duty to ensure the provision of sufficient places for pupils of statutory age and, within financial constraints, accommodation that is both suitable and in good condition.
- 4.2 In delivering the works contained within the 2015/16 Schools Minor Works Programme this will contribute to the delivery of the corporate priority *Young people's achievement and involvement: raising educational attainment and improving facilities for young people through partnership working*. Additionally, the works will assist in contributing to the corporate priority of *ensuring efficiency, effectiveness and equity in the delivery of excellent services to meet the needs of the community*. It also supports the delivery of Lewisham's *Children & Young People's Plan* (CYPP), which sets out the Council's vision for improving outcomes for all children and young people, and in so doing reducing the achievement gap between our most disadvantaged pupils and their peers.
- 4.3 The CYPP describes how partnership agencies, working with children, young people and their families, will support the delivery of the Borough's priorities for the wider community which are set out in Lewisham's Sustainable Community Strategy 2008-2020, and, in particular in relation to this report, its priority *Ambitious and Achieving* – where people are inspired and supported to achieve their potential.
- 4.4 As owner of the school buildings, the Council has a statutory duty under the Health & Safety at Work Act 1974 and associated approved codes of practice, to ensure that schools are fit for purpose and use by pupils and staff. Whilst schools are responsible for day to day maintenance of their buildings, any significant expenditure on capital schemes has to be funded by the Council.

5. Background

- 5.1 The Lewisham primary school estate, consists of property that ranges from Victorian/Edwardian construction through to that erected in the 1960's. Despite the ongoing programme of primary school capital renewals, significant maintenance works are required. However it should be noted that those schools in need of urgent and immediate action have receded in recent years.
- 5.2 The minor capital works programme is supported by the DFE through the Schools Capital Maintenance Grant.
- 5.3 The Schools Capital Maintenance Grant supports essential capital works that ensure schools are safe for the pupils and staff while mitigating full or partial closure as a result of, for example, heating failure.
- 5.4 Condition surveys are undertaken to identify essential maintenance works and indicative costs for the Schools Minor Capital Works Programme. The aforementioned surveys have informed the priority and costs for this report.
- 5.5 Due to the pressure on the resources available for the school places expansion programme, it is proposed that in 2015 and 2016 the DFE school capital maintenance grant is applied to that programme. There are unapplied resources in the Dedicated Schools Grant Asset Management Fund and it is proposed that these are used to support the schools capital maintenance programme in 2015/16 and 2016/17. The sum proposed in 2015/16 is £1.6m which should be sufficient to meet the identified demands for works that need to be undertaken.

6. The Process of Schools Minor Works Contracts 2015

- 6.1 On 15 September 2014 primary school headteachers were invited to submit an application for funding to undertake essential capital repairs to their schools. The bids were independently evaluated against the DfE Condition Rating Criteria (see table below – Condition Grading). Schools were advised that due to limited resources available for the programme only D1-rated works (the highest/most serious category) would be considered for inclusion. Furthermore, to be eligible for consideration, schools were required to support their application with a condition survey undertaken by a suitably qualified surveyor. This process was supported throughout by the schools Estates Management Team who provided advice and feedback on potential applications.
- 6.2 Bids were returned by 5 November 2014 and were evaluated by Pinnacle ESP, who were selected from the Council's Consultancy Framework. Their brief was to provide an assessment of the bids highlighting the condition, priority and estimated costs for the works. The following considerations were taken into account during this exercise:
 - The age of the elements inspected
 - Their likely lifespan

- Signs of deterioration
- Any possible breach of H&S legislation

Condition Grading	
Grade A	Good. Performing as intended and operating efficiently
Grade B	Satisfactory. Performing as intended but exhibiting minor deterioration.
Grade C	Poor. Exhibiting major defects and/or not operating as intended
Grade D	Bad. Life expired and/or serious risk of imminent failure.

Priority Grading	
Priority 1	Urgent work that will prevent immediate closure of premises and/or address an immediate high risk to health and safety of occupants and/or remedy a serious breach of legislation.
Priority 2	Essential work required within two years that will prevent serious deterioration of the fabric or services and/or address a medium risk to the health and safety of occupants and/or remedy a serious breach of legislation.
Priority 3	Desirable work required within three to five years that will prevent deterioration of the fabric or services and/or address a low risk to the health and safety of occupants and/or remedy a minor breach of legislation.
Priority 4	Long term work required outside of the five year planning period that will prevent deterioration of the fabric or services.

6.3 Bids were received from the schools listed below:

- Chelwood Nursery School
- Brindishe Green School
- Baring School
- Drumbeat 6th Form School
- Myatt Garden School
- Ashmead School
- Haseltine School
- Torridon School
- Deptford Park
- John Ball School
- Coopers Lane School

- Abbey Manor College (John Evelyn site)
The bids from schools were supplemented with information held by the LA on the condition of school buildings from past condition surveys and day to day working knowledge of school site issues.

6.4 The table below sets out the elements of works recommended for inclusion in the programme:

School	Element	Work	Estimated Cost
Baring	Mechanical services	Water heaters replacement	██████
Chelwood Nursery	Mechanical services	Water heaters replacement & pipework renewal	██████
Drumbeat 6 th Form	Mechanical services	2x Boiler renewal and associated works	██████
Myatt Garden	Building fabric	Roof renewal to gym/hall	██████
Ashmead	Building fabric	Boundary wall repairs	██████
Abbey Manor College (John Evelyn site)	Building fabric	Window replacement	██████
Haseltine	Building fabric	Boundary wall rebuild	██████
Torridon School	Building fabric	Roof replacement (Block B only)	██████
Deptford Park	Electrical services	Full electrical rewire (Block A only)	██████
Brindishe Green	Electrical services	Fire alarm, and lighting systems renewal	██████
Total			██████

6.5 The estimated costs, as noted in the table above, are inclusive of contingency, professional fees and asbestos R&D surveys (10% per element). Asbestos surveys (if required) will be co-ordinated over the Easter holiday which would further reduce any inconvenience to the schools and mitigate works overrunning into the autumn term.

6.6 The table below details the works that are proposed to be delivered in two phases (Phase 1 in 2015; Phase 2 in 2016). This approach is recommended in order to prioritise the works where the need was greatest; where the impact on loss of service would be most keenly felt; and, to share the limited resources available across the schools estate more equitably. These works will be specified and tendered along with the works recommended in 6.4.

School	Element	Work	Estimated Cost
Torridon	Building fabric	Roof replacement (Block	██████

		A)	
Torridon	Building fabric	Roof replacement (Block C)	██████
Haseltine	Building Fabric	Boundary wall repairs	██████
Deptford Park	Electrical services	Full electrical rewire (Blocks B – E)	██████
Total			██████

7. Reserve List

- 7.1 The table below identifies additional elements of work that could be considered for inclusion in the programme (the Reserve List). It is proposed that they are developed up to tender stage and included in the Invitation to Tender packs to prospective contractors. Economies of scale could be achieved in procuring works this way, particularly as it can prove more costly to vary a contract by bringing works in at a later date. This report seeks delegated authority to the Executive Director of CYP to determine whether (subject to budget) works from the reserve list should be included within the Minor Capital Works Programme for 2015/16.
- 7.2 If the tendered sums fall short of the pre-tender estimates, some of these works could be brought into the programme (up to the proposed allocation of ██████). If not, they can be held in reserve for consideration of inclusion in the 2016/17 Schools Minor Works Programme.

School	Element	Work	Estimated Cost
Brindishe Green	Building fabric	Replacement of soft play surfacing and ball court roof and new fencing	██████
Baring	Building fabric	Replacement of defective playground surfacing and new fencing	██████
John Ball	Electrical services	Rewire	██████
Total			██████

- 7.3 The table below sets out works that applications were received but not considered for the 2015/16 School Minor Works Programme

School	Element	Work	Estimated Cost	Reason
Coopers Lane	Building fabric	Roof replacement	██████	For possible inclusion in Primary Places Programme
Drumbeat 6 th Form	Building fabric	Window and external cladding replacement	██████	Other D1 rated works have higher priority; possible inclusion in Schools Expansion Programme
Rathfern	Building fabric	Replacement of defective	██████	Can be delivered through savings to the

		boundary wall		2014 programme
Forest Hill	Building fabric	Roof replacement to gym and art blocks (retained estate)	██████	Placed on 2014 reserve list; no significant deterioration of roof covering or reports of water penetration or localised repairs required
Coopers Lane	Electrical services	New PAVA system	██████	Non-D1 rated works
Coopers Lane	Electrical services	Upgrade of existing fire alarm system	██████	Non-D1 rated works
Brindishe Green	Electrical services	Replacement of small power circuits	██████	Non-D1 rated works
Total			██████	

8 RE:FIT Programme

8.1 RE:FIT is a procurement framework established by the GLA for energy efficiency retrofit works in public sector buildings. A dedicated strand for schools within the RE:FIT programme was established in 2013. The central benefit of the RE:FIT framework is that contractors provide guaranteed levels of energy savings for specified works. This facilitates funding of works under SALIX, an interest free loan for public sector organisations for energy efficiency capital works. SALIX loans can be repaid through reductions in future energy bills, which are underpinned through the energy savings guaranteed by the RE:FIT contractor. This model of funding energy efficiency works is well established in London and the RE:FIT schools programme has completed works in over 80 London schools to date.

8.2 The benefit of combining the schools minor works programme with RE:FIT and SALIX funding is that it could potentially free up funding from the minor works programme and allow additional works to take place.

9. Next Steps

9.1 All schools who submitted bids will be notified of the outcome of the evaluation exercise. They will fall into the following categories:

- Recommended for inclusion
- Placed on the Reserve List and final decision subject to value of tender returns
- Approved for delivery in 2016 programme as Phase 2 works
- Not recommended

- 9.2 The table below summarises the key activities leading up to works commencing on site in July 2015:

Date	Activity
November 2014	CYP DMT adopt programme
December 2014	M&C to approve programme, budget, procurement route and delegated authority to Executive Director for CYP to appoint recommended contractors
Dec 2014 – Jan 2015	Procurement of Contract Administrator services
Jan 2015 - Feb 2015	Detailed specification of works to be produced
March 2015	Tenders issued to contractors
April (Easter holiday)	R&D asbestos surveys carried out (if required)
April/May 2015	Tender evaluation and recommendation
June 2015	Pre-start meeting with school and contractor

10 Financial implications

- 10.1 The DFE Capital Maintenance grant has been earmarked to support the school places expansion programme. However, the Schools Forum sets aside money each year for unanticipated capital maintenance needs in schools which has not been required in the last two years. It is therefore proposed that [REDACTED] is allocated for planned capital maintenance works in schools for 2015/16 and the capital grant applied to pupil places expansion works. If necessary the DSG unapplied resources could support a similar allocation in 2016/17.
- 10.2 The identified programme of works at [REDACTED] is within the identified funding envelope. The approach to tendering is expected to achieve costs less than the [REDACTED] identified and so a reserve list has been established from which additional works up to the full [REDACTED] could be delivered.

Revenue Financial Implications

- 10.3 The works should result in reduced premises running costs for the schools in the programme. No additional revenue costs will fall upon the General Fund of the Council.

11. Legal implications

- 11.1 The Council has a statutory duty to provide primary and secondary education as well as a duty to ensure that all educational premises are in a good and safe state of repair.

11.2 The works contracts must be procured in compliance with the Council's Contract Procedure Rules and the award of the Contract must be made in accordance with the Council's Scheme of Delegation.

11.3 This is a key decision and is therefore required to be include in the publication of key decisions.

12. Crime and Disorder Implications

12.1 There are no such implications arising from this report.

13. Equalities Implications

13.1 The planned maintenance works as proposed will benefit all pupils, staff attending and working in the schools.

14. Environmental Implications

14.1 The Council's environmental objectives will be addressed in the invitation to tender documentation and will form part of the criteria used in the tender evaluation.

14.2 Furthermore the proposed works will result in enhanced energy saving technology or improvements in building fabric. These will reduce utility liabilities and the schools carbon foot print.

15. Conclusion

15.1 This report identifies capital schemes that based on the DFE rating are required to be undertaken urgently. The procurement and delivery of the works will result in building fabric and mechanical enhancements therefore reducing the risk or potential full or partial closure of schools.

Background Documents

Appendix A: 2015 proposed programme

If there are any queries in relation to this report please contact **Matthew Eady, Service Manager, Estates Management & Contracts, CYP** on 020 8314 6491 email matthew.eady@lewisham.gov.uk