

Schools Forum Agenda

Thursday, 16 March 2017

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

For more information contact: Janita Aubun tel 020 8314 7030
Email: janita.aubun@lewisham.gov.uk

Item	Pages
1. Apologies and Acceptance of Apologies	
2. Declaration of Interests	
3. Minutes of the Meeting 17 January 2017	1 - 5
4. Matters Arising	
5. Apprentice Levy	6 - 20
The report provides members with an update of the latest known position on the Apprentice Levy.	
6. IR 35	21 - 22
To consider the new regulations on employing self-employed people.	
7. New Woodlands - Funding Places 2017- 2018	23 - 26
This report looks at the funding for New Woodlands.	
8. Financial Update & Budget Monitoring	27 - 43
This paper updated members with the latest position in a number of financial areas including the response of the task group to the funding consultation.	
9. Scheme of Delegation, Finance Manual & Schools Forum Terms of Reference	44 - 56
This paper looks at both the Budget and budget monitoring escalation	

process. It provides details of the support a school will receive when their budget is likely to go into deficit.

The terms of reference of the Forum have not been reviewed for some years and the paper proposes a new terms of reference.

10. Work Programme for 2017/18

57 - 59

This report will consider the planned work of the Forum over the coming year.

11. Any Other Business

Future Meetings (Provisional)

22 June 2017
05 October 2017
07 December 2017
18 January 2018
15 March 2018

All meetings will be held between 16.30 and 18.30pm.

Sub Group Meetings (Provisional)

High Needs Sub Group	Early Years Sub Group	Funding Task Group
07 June 2017	30 March 2017	*08 June 2017
21 September 2017	20 April 2017	*20 September 2017
23 November 2017	11 May 2017	*22 November 2017
01 March 2018	08 June 2017	

*** These meeting dates are subject to receiving the outcome of the consultation.**

Agenda Item 3

LEWISHAM SCHOOLS FORUM

Minutes of the meeting held on Tuesday 17th January 2017

Membership (Quorum = 40% i.e. 8) ✓ = present ✕ = absent a = apologies
s = substitute

		Attendance				
		17/03	30/06	06/10	08/12	17/01
Primary School Headteachers						
Liz Booth	Dalmain	✓	✕	a	✓	✓
Paul Moriarty	Good Shepherd	✓	a	✓	✕	✓
Michael Roach	John Ball	✓	✓	✓	✓	✓
Sharon Lynch	St William of York	✓	a	✓	✓	✓
Keith Barr	Kender	✓	✓	✓	✓	✓
Nursery School Headteacher						
Nikki Oldhams	Chelwood	a	a	✓	✓	a
Cathryn Kinsey	(Substitute)					s
Secondary School Headteachers						
Jan Shapiro	Addey & Stanhope	a	✓	✓	a	✓
David Sheppard	Leathersellers Federation	✓	a	✓	✓	✓
Mark Phillips	Deptford Green			✓	✓	a
Ruth Holden	Bonus Pastor			✓	a	a
Special School Headteacher						
Lynne Haines	Greenvale	✓	✓	✓	✓	✓
Pupil Referral Unit Headteacher						
Dr Liz Jones	Abbey Manor	✓	a	✓	✓	a
Primary School Governors						
Rosamund Clarke	Perrymount	✓	✓	✓	✓	✓
Dame Erica Pienaar	John Ball	✓	✓	✓	✓	✓
Keith Dwan	King Alfred Federation	✓	✓	✓	✕	✓
Secondary & Special School Governors						
Pat Barber	Bonus Pastor	✓	a	✓	✓	✓
James Pollard	Addey & Stanhope	✓	a	✓	a	a
Ruth Elliot	Watergate	✓	✓	a	✓	✓
Academies						
Declan Jones	Haberdashers' Aske's	✓	a	✓	✓	✓
14-19 Consortium Rep						
Gordon Gillespie	14-19 Consortium		✕	s	✕	a

Early Years - PVI						
Dawn Nasser	Rose House Montessori					✓
Diocesan Authorities						
Sara Sanbrook-Davies	Southwark Diocesan Board of Education				✓	✓
Stephen Bryan	Education Commission	x	✓	✓	x	a

Also Present	
Sara Williams	Executive Director CYP
Dave Richards	CYP Group Finance Manager
Hayden Judd	Principal Accountant - Schools
Suhaib Saeed	LB Lewisham
Janita Aubun	Clerk

1. Apologies and Acceptance of Apologies

Apologies received from Gordon Gillespie, Nikki Oldhams, James Pollard and Mark Phillips.
Apologies accepted.

Substitute for Nursery School Head, Cathryn Kinsey.

2. Declaration of Interests

There were no declaration of interests.

3. Minutes of the Meeting held 8 December 2016

Minutes were agreed.

4. Matters Arising

No matters arising.

5. Funding Consultation

Forum were presented with an update on the outcome of the National Schools Funding Formula consultation of Spring 2016 and considered the second consultation which was issued at the same time and closes 22 March 2017. Forum were informed of the impact of the second consultation which included:-

- The introduction of a minimum of £200M additional funding nationally in 2018/19 and 2019/20.
- 3% funding floor.
- Additional funding for high needs.

Background information

In terms of the % change total allocations between the current rate and the National Funding Formula (NFF), compared to the other boroughs, Lewisham is one of the 4 largest losers.

The DfE have confirmed that they will move to a 'soft' national funding formula in 2018/19, followed by a 'hard' formula. This means that with the implementation of the NFF, local authorities will still determine their individual schools' funding allocations through their own local formula.

Lewisham are however considering introducing the national funding formula straight away in 2018/19 but discussions are going to be held with the DfE before any firm decision is made.

Owing to the national funding formula proposed reductions of 3% for Lewisham schools and other cost pressures in the region of 8%, it is likely that schools will have to find reductions of 11% over the next 3 years

The Executive Director for Lewisham is meeting with the mayor next week to discuss the second National Funding Formula.

Decision:

- Position on the National Funding Formula – Consultation Stage 2, noted, and the Funding Task Group has been asked to draft a borough response to the consultation.

6. Dedicated Schools Grant Budget Report 2017/18

Forum were presented with a report to agree the Dedicated Schools Grant (DSG) for 2017/18.

Forum were informed that the DSG for 2017/18 has provisionally been set at £290.7M by the DfE – an increase on last year of 1.5%.

Chair explained the voting rights were applicable for this paper.

Forum raised the issue of the apprenticeship levy and the use of a registered provider. It was felt that that the local authority should give schools guidance on this as funding to pay for apprenticeships and professional development for staff, will be lost after 2 years if not spent.

Recommendations agreed:-

- Allocate an extra £0.342M to schools on the basis of pupil numbers.
- That £0.3M of the above agreed allocation be de-delegated to support borough wide school-led improvement.
- PFI formula factor be introduced for secondary schools.

- That the PFI factor funds any annual schools cost of a PFI scheme which equates to more than 10% of the school's individual formula budget.
- The extra £0.5M allocated to the High Needs block be held in the High Needs Block.
- Schools members by voting phase, agree the below budget for 2017/18 that will be de-delegated.

Ref	Heading	Primary £'000	Secondary £'000
A	De-delegation for mainstream schools for Contingencies	460	190
B	Administration of free school meals	44	22
C	Staff costs – Supply Cover	1,195	490
D	School Improvement Fund	212	88

- School members agree the total direct spend on the admissions team be £489K in 2017/18, an increase of £40K.
- The minimum funding guarantee be applied to all-through schools so that primary and secondary pupils are protected at their appropriate rates.
- Agree the terms of reference for the following mutual funds:-
 - a. Supply
 - b. Contingency
 - c. Growth fund
- Discontinue the Balance Control Mechanism.

the Forum noted the following:-

Reduction to the Trade Union support budget.

Cost pressures on schools.

Work be undertaken to review the overheads charged to the DSG.

Position on additional hours for 3 and 4 year olds.

Position on the application of the MFG disapplication for special schools.

Work be undertaken to review the support services charged to the Dedicated Schools Grant.

A further report be brought to Forum on New Woodlands in March.

7. Any Other Business

Forum agreed that the 9th February meeting will no longer be taking place. No other business was raised.

Meeting closed.

Date of next meeting:-

16 March 4.30 to 6.30pm

SCHOOLS FORUM ACTION SUMMARY

ITEM	ACTION TO BE TAKEN	OFFICER (S) RESPONSIBLE	OUTCOME/ CURRENT POSITION
Sub Group Membership March 2016	Add Secondary Head to Formula Consultation Task Group	Dave Richards	TBC
Schools Forum 17 January 2017, Item 6 – Support Services Charges	Review support services charges made to the DSG	Dave Richards	March 2017 schools forum
	Report on New Woodlands	Dave Richards	March 2017 schools forum

Agenda Item 5

Schools Forum			
REPORT TITLE	The Apprenticeship Levy and Public Sector Targets		
KEY DECISION		Item No.	5
CLASS		Date	16 March 2017

1. Purpose of the Report

To brief the Forum on the new government Apprenticeship Levy and the Public Sector Targets for Apprenticeships. To give an analysis of the implications for Lewisham Schools in relation to both the levy and meeting the target. Forum members are advised to take particular note of point 4 in this report.

2. Background

- 2.1 The Government has committed to creating 3 million new apprenticeships in this Parliament, (2015-2020), with 2 primary measures to achieve this ambition. The 2 measures are: -
- The Apprenticeship Levy
 - The Enterprise Act 2016 which introduces apprenticeship targets for public sector organisations including schools.
- 2.2 *Apprenticeship Levy:* Employers with a UK pay bill of over £3m from both private and public sectors will be required to pay 0.5% of that into a levy. The levy payment will be ring fenced in a digital account held by government and can be used to purchase apprenticeship training.

The Enterprise Act 2016: The Enterprise Act came into force on 4th May 2016. It introduced a range of changes to employment law including the introduction of apprenticeship targets for public sector organisations in England. The targets will be set by future regulation but, in principle, will apply only to those bodies with 250 or more employees. The Act also introduced a statutory definition of 'apprenticeship' in England to help set minimum standards. In future it will be an offence to label any training as an 'apprenticeship' unless it satisfies the statutory requirements and forms part of an individual's employment.

3. What does it mean for Lewisham and Lewisham Schools?

- 3.1 In the case of Lewisham Community Schools where the Council is the employer, the levy will be calculated by using the schools' pay bill combined with the rest of the Council pay bill. Payments of the levy will

commence from 1st May 2017 and will be passed to HMRC through the PAYE process on a monthly basis.

- 3.2 A pay bill is made up of the total amount of your employee earnings that are subject to Class 1 National Insurance contributions. That is, salaries, bonuses, allowances, commissions and pension contributions.
- 3.3 Total pay bill for Lewisham = £205m. Levy = £1,028,625
Council pay bill = £72m. Levy = £362,378
Schools' pay bill = £133m. Levy = £666,246

These figures are estimated.

- 3.4 The public sector target for apprenticeships in 2017/18 is 2.3% of the total headcount (not FTE). A list is attached identifying what it may mean for individual schools. The targets will be based on apprenticeship starts and are not limited to new staff joining the organisation. Existing staff completing an Apprenticeship will count towards the target but only if the Apprenticeship is an up skilling opportunity; it cannot be used to qualify staff within their existing roles.

An apprentice who starts on a level 2 course and then progresses onto a level 3 at the end of their first apprenticeship will count as 2 starts.

- 3.5 There are no plans to introduce any legal or financial penalties for not achieving the target. However, to ensure public bodies are having regard to the target and in order to increase transparency there will be a duty for public bodies to publish information on progress towards meeting the apprenticeship targets annually. It is anticipated that school progress will be published individually within the annual report.

4. Implications and Challenges for Schools and the Council

- 4.1 Each employer is allowed one digital account only and therefore levy from community schools where the Council is the employer and levy from the rest of the Council will be held in one account. It is however possible to identify and monitor the contributions on an individual school level..
- 4.2 Where the Council is the payroll provider for particular schools but is not the employer and those schools have an individual pay bill of more than 3 million pounds, the employers will need to set up a new payroll reference with HMRC. The information available indicates that there are 3 schools in this position. There is no need for the schools to change payroll provider. However, these schools will have their own separate digital account and control over their levy contributions. The Council's payroll will make the calculations and make the payments to HMRC

- 4.3 Where the Council is the payroll provider for particular schools but is not the employer and those schools have an individual pay bill of **less** than 3 million pounds, those schools are not required to contribute to the levy. A number of our smaller voluntary aided/faith schools are in this position and may continue to engage apprentices through the colleges. They do not have access to the levy. The challenge here is for the Council payroll provider because the pay bills for those schools will need to be excluded from the total pay bill before the calculation of the Council's liability for the levy is calculated.
- 4.4 Community schools that use their own payroll provider will need to make arrangements for their provider to liaise with the Council's payroll provider as their pay bill will need to be included as part of the Council's pay bill for the levy. The Council's payroll provider will add the school's levy contribution to the Council's monthly contribution to HMRC, the schools will then be required to make reimbursement to the Council. The information available indicates that there are 2 schools in this position.
- 4.5 Schools where the Council is not the employer and they also manage their own payroll will have their own digital accounts and will make their own arrangements for processing the levy if the pay bill is more than £3 million.
- 4.6 Whilst Apprenticeship Frameworks and Standards are available with more in the development stage there is a concern that the availability of suitable options will be limited. In addition, the public sector target is unrealistic for organisations to meet. A list is attached of frameworks that are currently available. Also provided below is a link to a useful search engine that will allow schools to search for suitable courses. The link also includes details of when the courses start and how frequently they are run and of providers that are appropriately located.
The link is:
<https://findapprenticeshiptraining.sfa.bis.gov.uk/Apprenticeship/Search>
- 4.7 The levy funding can only be spent on the costs of the apprenticeship training and end point assessment. It cannot be spent on associated costs such as salary, travel or related administration costs. Furthermore, the requirements are that the apprentice spends at least 20% of their time training away from the job. At a time when many schools are looking to reduce staff due to budget pressures this requirement means spending additional budget on staffing whilst accepting a 20% loss in productivity at the same time.
- 4.8 It is true to say therefore that with the restrictions on what the levy can be spent on and limited resources available to take on extra staff, schools and the rest of the Council will find it difficult to spend all of the funds in their digital account. Furthermore, funds in digital accounts expire after 24 months and therefore there is a risk that these funds will be re-absorbed into the system and spent elsewhere in the UK.

4.9 Access to the digital account will be restricted to a small number of people and it is therefore anticipated that the co-ordination and management of the levy fund will remain at the centre and will need to be carried out on behalf of schools. The resources to undertake this have not been identified or accounted for. However, a proforma is being developed at the moment for schools to use to make application for funding and it is likely that this process will be managed within the Schools' HR Team.

Diane Parkhouse
Schools' HR team Business Manager

Framework (F) or standard (S)	Framework / Standard name	Level	Framework pathway name	Sector Subject Area (F) or Sector (S) Description	Funding band
Framework	Accounting	2	Accounting	Accounting and Finance	£2,000
Framework	Accounting	3	Accounting	Accounting and Finance	£2,000
Framework	Accounting	4	Accounting	Accounting and Finance	£2,500
Framework	Activity Leadership	2	Outdoors	Sport, Leisure and Recreation	£1,500
Framework	Activity Leadership	2	Exercise and Fitness	Sport, Leisure and Recreation	£2,000
Framework	Activity Leadership	2	Coaching	Sport, Leisure and Recreation	£1,500
Framework	Activity Leadership	2	Leadership	Sport, Leisure and Recreation	£2,000
Framework	Agriculture	2	Agriculture	Agriculture	£1,500
Framework	Agriculture	3	Agriculture	Agriculture	£3,000
Framework	Agriculture	4	Agricultural Business Management	Agriculture	£5,000
Framework	Animal Care	2	Animal Care	Animal Care and Veterinary Science	£2,000
Framework	Animal Care	3	Animal Care	Animal Care and Veterinary Science	£2,500
Framework	Aviation Operations on the Ground	2	Aviation Operations on the Ground	Transportation Operations and Maintenance	£3,000
Framework	Aviation Operations on the Ground	3	Aviation Operations on the Ground	Transportation Operations and Maintenance	£6,000
Framework	Barbering	2	Barbering	Service Enterprises	£3,000
Framework	Barbering	3	Barbering	Service Enterprises	£3,000
Framework	Beauty Therapy	2	Beauty Therapy General	Service Enterprises	£2,000
Framework	Beauty Therapy	2	Beauty Therapy Make-up	Service Enterprises	£2,000
Framework	Beauty Therapy	3	Beauty Therapy General	Service Enterprises	£2,500
Framework	Beauty Therapy	3	Beauty Therapy Make-up	Service Enterprises	£3,000
Framework	Beauty Therapy	3	Beauty Therapy Massage	Service Enterprises	£2,500
Framework	Broadcast Technology Higher Apprenticeship	6	Broadcast Technology	Media and Communication	£9,000
Framework	Building Services Engineering Technology and Project	3	Technician	Engineering	£12,000
Framework	Building Services Engineering Technology and Project	3	Design Technician	Engineering	£12,000
Framework	Bus and Coach Engineering and Maintenance	2	Mechanical	Transportation Operations and Maintenance	£4,000
Framework	Bus and Coach Engineering and Maintenance	2	Electrical	Transportation Operations and Maintenance	£3,500
Framework	Bus and Coach Engineering and Maintenance	2	Body	Transportation Operations and Maintenance	£4,000
Framework	Bus and Coach Engineering and Maintenance	3	Mechanical	Transportation Operations and Maintenance	£9,000
Framework	Bus and Coach Engineering and Maintenance	3	Electrical	Transportation Operations and Maintenance	£9,000
Framework	Bus and Coach Engineering and Maintenance	3	Body	Transportation Operations and Maintenance	£9,000
Framework	Bus and Coach Engineering and Maintenance	3	Mechanical and Electrical	Transportation Operations and Maintenance	£9,000
Framework	Business and Administration	2	Business and Administration	Administration	£2,000
Framework	Business and Administration	2	Legal Administration	Administration	£2,000
Framework	Business and Administration	2	Medical Administration	Administration	£1,500
Framework	Business and Administration	3	Business and Administration	Administration	£2,500
Framework	Business and Administration	3	Legal Administration	Administration	£2,500
Framework	Business and Administration	3	Medical Administration	Administration	£2,000
Framework	Business and Professional Administration	4	Business and Professional Administration	Administration	£4,000
Framework	Care Leadership and Management	5	General Adult Social Care	Health and Social Care	£2,000
Framework	Care Leadership and Management	5	Specialist Adult Social Care	Health and Social Care	£2,000
Framework	Catering and Professional Chefs	2	Food Production and Cooking	Hospitality and Catering	£2,000
Framework	Catering and Professional Chefs	2	Professional Cookery	Hospitality and Catering	£2,500
Framework	Catering and Professional Chefs	2	Craft Cuisine	Hospitality and Catering	£3,500
Framework	Catering and Professional Chefs	2	Chefs in the Licensed Hospitality Industry	Hospitality and Catering	£2,000
Framework	Catering and Professional Chefs	3	Professional Cookery	Hospitality and Catering	£2,500
Framework	Catering and Professional Chefs	3	Patisserie and Confectionery	Hospitality and Catering	£2,500
Framework	Catering and Professional Chefs	3	Craft Cuisine	Hospitality and Catering	£5,000
Framework	Children and Young People's Workforce	2	Children and Young People's Workforce	Child Development and Well Being	£2,000
Framework	Children and Young People's Workforce	3	Early Years Educator	Child Development and Well Being	£2,500
Framework	Children and Young People's Workforce	3	Children and Young People's Social Care	Child Development and Well Being	£2,500
Framework	Children and Young People's Workforce	3	Residential Childcare	Child Development and Well Being	£2,500
Framework	Cleaning and Environmental Support Services	2	Cleaning and Support Services	Service Enterprises	£1,500
Framework	Cleaning and Environmental Support Services	2	Local Environmental Services	Service Enterprises	£1,500
Framework	Cleaning and Environmental Support Services	2	Pest Management	Service Enterprises	£1,500
Framework	Cleaning and Environmental Support Services	3	Cleaning Supervision	Service Enterprises	£1,500
Framework	Coaching	2	Coaching Swimming	Sport, Leisure and Recreation	£1,500
Framework	Coaching	2	Coaching Tennis	Sport, Leisure and Recreation	£1,500
Framework	Coaching	3	Coaching Tennis	Sport, Leisure and Recreation	£2,000
Framework	Community Arts	2	Community Arts Administration	Crafts, Creative Arts and Design	£2,000
Framework	Community Arts	3	Community Arts Management	Crafts, Creative Arts and Design	£2,500
Framework	Community Safety	2	Community Fire Safety	Public Services	£1,500
Framework	Composite Engineering	2	Composite Engineering	Manufacturing Technologies	£3,000
Framework	Composite Engineering	3	Composite Engineering	Manufacturing Technologies	£9,000
Framework	Construction Building	2	Decorative Finishing and Industrial Painting	Building and Construction	£6,000
Framework	Construction Building	2	Maintenance Operations	Building and Construction	£5,000
Framework	Construction Building	2	Trowel Occupations	Building and Construction	£5,000
Framework	Construction Building	2	Wood Occupations	Building and Construction	£6,000
Framework	Construction Building	2	Woodmachining	Building and Construction	£6,000
Framework	Construction Building	3	Trowel Occupations	Building and Construction	£6,000
Framework	Construction Building	3	Wood Occupations	Building and Construction	£9,000
Framework	Construction Building	3	Decorative Finishing	Building and Construction	£9,000
Framework	Construction Civil Engineering	2	Construction Operations	Building and Construction	£4,000
Framework	Construction Civil Engineering	2	Formwork Occupations	Building and Construction	£6,000
Framework	Construction Civil Engineering	2	Highways Maintenance	Building and Construction	£5,000
Framework	Construction Civil Engineering	2	Plant Maintenance	Building and Construction	£9,000
Framework	Construction Civil Engineering	2	Plant Operations	Building and Construction	£4,000
Framework	Construction Civil Engineering	2	Tunnelling Operations	Building and Construction	£5,000
Framework	Construction Civil Engineering	2	Specialist Concrete Occupations	Building and Construction	£5,000
Framework	Construction Civil Engineering	2	Roadbuilding	Building and Construction	£4,000
Framework	Construction Civil Engineering	2	Steelfixing	Building and Construction	£4,000
Framework	Construction Civil Engineering	2	Steelfixing Occupations Major Projects	Building and Construction	£9,000
Framework	Construction Civil Engineering	3	Plant Maintenance	Building and Construction	£12,000
Framework	Construction Management	4	Construction and Building Services Manager	Building and Construction	£12,000

Framework (F) or standard (S)	Framework / Standard name	Level	Framework pathway name	Sector Subject Area (F) or Sector (S) Description	Funding band
Framework	Construction Management	4	Construction Site Supervision	Building and Construction	£12,000
Framework	Construction Management	5	Foundation Degree Professional Practice in	Building and Construction	£12,000
Framework	Construction Management	5	Sustainability	Building and Construction	£12,000
Framework	Construction Management	5	Foundation Degree in Architecture	Building and Construction	£12,000
Framework	Construction Management	5	Foundation Degree in Built Environment	Building and Construction	£12,000
Framework	Construction Management	5	Foundation Degree in Civil Engineering	Building and Construction	£12,000
Framework	Construction Management	6	Construction Site Management	Building and Construction	£12,000
Framework	Construction Management	6	Management Quantity Surveying and Comm	Building and Construction	£12,000
Framework	Construction Specialist	2	Accessing and Rigging	Building and Construction	£6,000
Framework	Construction Specialist	2	Applied Waterproof Membranes	Building and Construction	£6,000
Framework	Construction Specialist	2	Cladding Occupations	Building and Construction	£6,000
Framework	Construction Specialist	2	Wall and Floor Tiling	Building and Construction	£5,000
Framework	Construction Specialist	2	Fitted Interiors	Building and Construction	£5,000
Framework	Construction Specialist	2	Floorcovering	Building and Construction	£5,000
Framework	Construction Specialist	2	Interior Systems	Building and Construction	£5,000
Framework	Construction Specialist	2	Mastic Asphaltting	Building and Construction	£6,000
Framework	Construction Specialist	2	Plastering	Building and Construction	£6,000
Framework	Construction Specialist	2	Roofing Occupations	Building and Construction	£6,000
Framework	Construction Specialist	2	Stonemasonry	Building and Construction	£6,000
Framework	Construction Specialist	2	Insulation and Building Treatments	Building and Construction	£3,500
Framework	Construction Specialist	2	Thermal Insulation	Building and Construction	£4,000
Framework	Construction Specialist	3	Plastering	Building and Construction	£6,000
Framework	Construction Specialist	3	Roofing Occupations	Building and Construction	£12,000
Framework	Construction Specialist	3	Stonemasonry	Building and Construction	£9,000
Framework	Construction Specialist	3	Wall and Floor Tiling	Building and Construction	£9,000
Framework	Construction Specialist	3	Heritage Skills	Building and Construction	£6,000
Framework	Construction Specialist	3	Mastic Asphaltting	Building and Construction	£9,000
Framework	Construction Specialist	3	Thermal Insulation	Building and Construction	£6,000
Framework	Construction Technical and Professional	3	Built Environment and Design	Building and Construction	£6,000
Framework	Construction Technical and Professional	3	Construction Contracting Operations	Building and Construction	£9,000
Framework	Construction Technical and Professional	3	Civil Engineering for Technicians	Building and Construction	£9,000
Framework	Construction Technical and Professional	3	Occupational Work Supervision	Building and Construction	£5,000
Framework	Construction Technical and Professional	3	Building Control	Building and Construction	£9,000
Framework	Construction Technical and Professional	3	Geomatics Data Analysis	Building and Construction	£9,000
Framework	Construction Technical and Professional	3	Town Planning Technical Support	Building and Construction	£9,000
Framework	Consumer Electrical and Electronic Products	2	Delivering and Installing	Engineering	£2,000
Framework	Consumer Electrical and Electronic Products	2	Repairing Module Faults	Engineering	£3,000
Framework	Consumer Electrical and Electronic Products	3	Repairing Component Faults	Engineering	£3,500
Framework	Contact Centre Operations	2	Contact Centre Operations	Administration	£1,500
Framework	Contact Centre Operations	3	Contact Centre Operations	Administration	£2,000
Framework	Court, Tribunal and Prosecution Operations	2	Court and Tribunal Administration	Public Services	£1,500
Framework	Court, Tribunal and Prosecution Operations	3	Court and Tribunal Administration	Public Services	£1,500
Framework	Creative and Digital Media	3	Creative and Digital Media	Media and Communication	£4,000
Framework	Creative and Digital Media	4	Interactive Design and Development	Media and Communication	£2,500
Framework	Cultural and Heritage Venue Operations	2	Cultural Heritage	Crafts, Creative Arts and Design	£2,000
Framework	Cultural and Heritage Venue Operations	2	Cultural and Heritage Venue Operations	Crafts, Creative Arts and Design	£2,000
Framework	Cultural and Heritage Venue Operations	3	Cultural and Heritage Venue Operations	Crafts, Creative Arts and Design	£2,000
Framework	Cultural and Heritage Venue Operations	3	Cultural and Heritage Venue Operations	Crafts, Creative Arts and Design	£2,500
Framework	Custodial Care	2	Custodial Care	Public Services	£2,000
Framework	Custodial Care	3	Custodial Care	Public Services	£2,000
Framework	Customer Service	2	Customer Service	Administration	£1,500
Framework	Customer Service	3	Customer Service	Administration	£2,000
Framework	Design	2	Design Support	Crafts, Creative Arts and Design	£2,000
Framework	Design	3	Design	Crafts, Creative Arts and Design	£5,000
Framework	Digital Learning Design	3	Digital Learning Design	Direct Learning Support	£4,000
Framework	Digital Learning Design	4	Digital Learning Design	Direct Learning Support	£2,000
Framework	Domestic Heating	2	Domestic Heating	Engineering	£5,000
Framework	Domestic Heating	3	Oil-Fired, Solid Fuel or Environmental Optic	Engineering	£6,000
Framework	Domestic Heating	3	Gas-Fired Warm Air Appliances	Engineering	£6,000
Framework	Domestic Heating	3	Gas-Fired Water and Central Heating Applia	Engineering	£6,000
Framework	Driving Goods Vehicles	2	Motorcycle / Cycle Courier	Warehousing and Distribution	£2,000
Framework	Driving Goods Vehicles	2	Van Driver	Warehousing and Distribution	£2,000
Framework	Driving Goods Vehicles	2	Rigid Vehicle Driver	Warehousing and Distribution	£2,500
Framework	Driving Goods Vehicles	2	Articulated / Drawbar Driver	Warehousing and Distribution	£2,000
Framework	Driving Goods Vehicles	3	Van Driver	Warehousing and Distribution	£1,500
Framework	Driving Goods Vehicles	3	Rigid Vehicle Driver	Warehousing and Distribution	£1,500
Framework	Driving Goods Vehicles	3	Articulated / Drawbar Driver	Warehousing and Distribution	£1,500
Framework	Driving Goods Vehicles	3	Transporting Freight by Road (Van)	Warehousing and Distribution	£1,500
Framework	Driving Goods Vehicles	3	Transporting Freight by Road (Rigid)	Warehousing and Distribution	£1,500
Framework	Driving Goods Vehicles	3	Transporting Freight by Road (Articulated /	Warehousing and Distribution	£1,500
Framework	Electrotechnical	3	Electrical Installation	Engineering	£12,000
Framework	Electrotechnical	3	Electrical Maintenance	Engineering	£12,000
Framework	Electrotechnical	3	Highway Electrical Systems Service and Mai	Engineering	£6,000
Framework	Electrotechnical	3	Highway Electrical Systems Commissioning	Engineering	£6,000
Framework	Employment Related Services	3	Employment Related Services	Public Services	£1,500
Framework	Engineering Construction	3	Pipefitting	Engineering	£9,000
Framework	Engineering Construction	3	Mechanical Fitting	Engineering	£9,000
Framework	Engineering Construction	3	Welding (Pipework)	Engineering	£12,000
Framework	Engineering Construction	3	Welding (Plate)	Engineering	£9,000
Framework	Engineering Construction	3	Plating	Engineering	£9,000
Framework	Engineering Construction	3	Steel Erecting	Engineering	£12,000
Framework	Engineering Construction	3	Rigging (Moving Loads)	Engineering	£12,000
Framework	Engineering Construction	3	Electrical Installation	Engineering	£12,000

Framework (F) or standard (S)	Framework / Standard name	Level	Framework pathway name	Sector Subject Area (F) or Sector (S) Description	Funding band
Framework	Engineering Construction	3	Non Destructive Testing	Engineering	£6,000
Framework	Engineering Construction	3	Instrument and Control	Engineering	£9,000
Framework	Engineering Construction	3	Electrical Maintenance	Engineering	£12,000
Framework	Engineering Construction	3	Mechanical Maintenance	Engineering	£12,000
Framework	Engineering Construction	3	Design and Draughting	Engineering	£12,000
Framework	Engineering Construction	3	Project Control	Engineering	£12,000
Framework	Engineering Construction	3	Instrument Pipefitting	Engineering	£12,000
Framework	Engineering Construction	3	Construction and Completions Control	Engineering	£12,000
Framework	Engineering Manufacture	2	Aerospace	Manufacturing Technologies	£5,000
Framework	Engineering Manufacture	2	Marine (Ship, Yacht, Boatbuilding, Maintenance)	Manufacturing Technologies	£5,000
Framework	Engineering Manufacture	2	Mechanical Manufacturing Engineering	Manufacturing Technologies	£4,000
Framework	Engineering Manufacture	2	Engineering Maintenance and Installation	Manufacturing Technologies	£4,000
Framework	Engineering Manufacture	2	Fabrication and Welding	Manufacturing Technologies	£5,000
Framework	Engineering Manufacture	2	Materials Processing and Finishing	Manufacturing Technologies	£4,000
Framework	Engineering Manufacture	2	Engineering Technical Support	Manufacturing Technologies	£5,000
Framework	Engineering Manufacture	3	Aerospace	Manufacturing Technologies	£12,000
Framework	Engineering Manufacture	3	Marine (Ship Building, Maintenance and Repair)	Manufacturing Technologies	£9,000
Framework	Engineering Manufacture	3	Mechanical Manufacturing Engineering	Manufacturing Technologies	£9,000
Framework	Engineering Manufacture	3	Marine (Yacht and Boat Building, Maintenance)	Manufacturing Technologies	£9,000
Framework	Engineering Manufacture	3	Engineering Maintenance	Manufacturing Technologies	£9,000
Framework	Engineering Manufacture	3	Fabrication and Welding	Manufacturing Technologies	£9,000
Framework	Engineering Manufacture	3	Materials Processing and Finishing	Manufacturing Technologies	£12,000
Framework	Engineering Manufacture	3	Engineering Technical Support	Manufacturing Technologies	£9,000
Framework	Engineering Manufacture	3	Electrical and Electronic Engineering	Manufacturing Technologies	£12,000
Framework	Engineering Manufacture	3	Installation and Commissioning	Manufacturing Technologies	£9,000
Framework	Engineering Manufacture	3	Engineering Toolmaking	Manufacturing Technologies	£9,000
Framework	Engineering Manufacture	3	Automotive	Manufacturing Technologies	£12,000
Framework	Engineering Manufacture	3	Engineering Woodworking, Pattern and Moulding	Manufacturing Technologies	£9,000
Framework	Engineering Manufacture	3	Engineering Leadership	Manufacturing Technologies	£12,000
Framework	Environmental Conservation	2	Environmental Conservation	Environmental Conservation	£1,500
Framework	Environmental Conservation	2	Dry Stone Walling	Environmental Conservation	£1,500
Framework	Environmental Conservation	3	Environmental Conservation	Environmental Conservation	£1,500
Framework	Environmental Conservation	3	Dry Stone Walling	Environmental Conservation	£1,500
Framework	Equine	2	Horse Care	Animal Care and Veterinary Science	£2,000
Framework	Equine	2	Racehorse Care	Animal Care and Veterinary Science	£2,000
Framework	Equine	2	Harness Horse Care	Animal Care and Veterinary Science	£2,000
Framework	Equine	3	Horse Care and Management	Animal Care and Veterinary Science	£3,000
Framework	Equine	3	Racehorse Care and Management	Animal Care and Veterinary Science	£2,500
Framework	Equine	3	Harness Horse Care and Management	Animal Care and Veterinary Science	£2,500
Framework	Exercise and Fitness	2	Exercise and Fitness	Sport, Leisure and Recreation	£2,500
Framework	Exercise and Fitness	3	Personal Training	Sport, Leisure and Recreation	£2,000
Framework	Facilities Management	2	Facilities Services	Service Enterprises	£1,500
Framework	Facilities Management	3	Facilities Management	Service Enterprises	£2,000
Framework	Facilities Management	4	Generic	Service Enterprises	£1,500
Framework	Facilities Management	5	Generic	Service Enterprises	£6,000
Framework	Facilities Management	5	Building Services	Service Enterprises	£1,500
Framework	Farriery	3	Farriery	Animal Care and Veterinary Science	£9,000
Framework	Fashion and Textiles	2	Textiles	Manufacturing Technologies	£2,500
Framework	Fashion and Textiles	2	Apparel	Manufacturing Technologies	£2,000
Framework	Fashion and Textiles	2	Leather Goods	Manufacturing Technologies	£2,500
Framework	Fashion and Textiles	2	Footwear	Manufacturing Technologies	£2,500
Framework	Fashion and Textiles	2	Saddlery	Manufacturing Technologies	£4,000
Framework	Fashion and Textiles	2	Dry Cleaning	Manufacturing Technologies	£2,000
Framework	Fashion and Textiles	2	Laundry	Manufacturing Technologies	£2,500
Framework	Fashion and Textiles	2	Textile Care Services (Laundry and Dry Cleaning)	Manufacturing Technologies	£3,500
Framework	Fashion and Textiles	2	Leather Production	Manufacturing Technologies	£2,000
Framework	Fashion and Textiles	3	Textiles	Manufacturing Technologies	£9,000
Framework	Fashion and Textiles	3	Apparel	Manufacturing Technologies	£12,000
Framework	Fashion and Textiles	3	Leather Goods	Manufacturing Technologies	£12,000
Framework	Fashion and Textiles	3	Footwear	Manufacturing Technologies	£9,000
Framework	Fashion and Textiles	3	Saddlery	Manufacturing Technologies	£12,000
Framework	Fashion and Textiles	3	Tailoring	Manufacturing Technologies	£9,000
Framework	Fashion and Textiles	3	Leather Production	Manufacturing Technologies	£12,000
Framework	Floristry	2	Floristry	Horticulture and Forestry	£2,000
Framework	Floristry	3	Floristry	Horticulture and Forestry	£2,500
Framework	Food and Drink	2	Meat and Poultry Industry Skills	Manufacturing Technologies	£1,500
Framework	Food and Drink	2	Baking Industry Skills	Manufacturing Technologies	£1,500
Framework	Food and Drink	2	Milling Industry Skills	Manufacturing Technologies	£2,000
Framework	Food and Drink	2	Food Industry Skills	Manufacturing Technologies	£1,500
Framework	Food and Drink	2	Food Manufacturing Excellence	Manufacturing Technologies	£1,500
Framework	Food and Drink	2	Fish and Shellfish Industry Skills	Manufacturing Technologies	£1,500
Framework	Food and Drink	2	Brewing Industry Skills	Manufacturing Technologies	£1,500
Framework	Food and Drink	2	Dairy Industry Skills	Manufacturing Technologies	£2,000
Framework	Food and Drink	2	Fresh Produce Industry Skills	Manufacturing Technologies	£1,500
Framework	Food and Drink	2	Livestock Market Drovers Operations	Manufacturing Technologies	£2,000
Framework	Food and Drink	2	Food Industry Team Leading	Manufacturing Technologies	£1,500
Framework	Food and Drink	3	Meat and Poultry Industry Skills	Manufacturing Technologies	£9,000
Framework	Food and Drink	3	Baking Industry Skills	Manufacturing Technologies	£9,000
Framework	Food and Drink	3	Food Industry Skills and Technical Management	Manufacturing Technologies	£6,000
Framework	Food and Drink	3	Food Manufacturing Excellence	Manufacturing Technologies	£6,000
Framework	Food and Drink	3	Fresh Produce Industry Skills	Manufacturing Technologies	£6,000
Framework	Food and Drink	3	Fish and Shellfish Industry Skills	Manufacturing Technologies	£6,000
Framework	Funeral Operations and Services	2	Funeral Operations and Services	Service Enterprises	£1,500

Framework (F) or standard (S)	Framework / Standard name	Level	Framework pathway name	Sector Subject Area (F) or Sector (S) Description	Funding band
Framework	Funeral Operations and Services	3	Funeral Operations and Services	Service Enterprises	£1,500
Framework	Furniture, Furnishings and Interiors Manufacturing	2	Furniture Making	Manufacturing Technologies	£5,000
Framework	Furniture, Furnishings and Interiors Manufacturing	2	Finishing Furniture	Manufacturing Technologies	£5,000
Framework	Furniture, Furnishings and Interiors Manufacturing	2	Restoring Furniture	Manufacturing Technologies	£4,000
Framework	Furniture, Furnishings and Interiors Manufacturing	2	Fitted Furniture and Interiors	Manufacturing Technologies	£4,000
Framework	Furniture, Furnishings and Interiors Manufacturing	2	Upholstery and Soft Furnishings	Manufacturing Technologies	£5,000
Framework	Furniture, Furnishings and Interiors Manufacturing	2	Wood Machining	Manufacturing Technologies	£5,000
Framework	Furniture, Furnishings and Interiors Manufacturing	2	Furniture and Wood Processing	Manufacturing Technologies	£6,000
Framework	Furniture, Furnishings and Interiors Manufacturing	2	Furniture and Wood Processing - CNC Machi	Manufacturing Technologies	£6,000
Framework	Furniture, Furnishings and Interiors Manufacturing	2	Solid Surfaces	Manufacturing Technologies	£2,000
Framework	Furniture, Furnishings and Interiors Manufacturing	3	Furniture Making	Manufacturing Technologies	£9,000
Framework	Furniture, Furnishings and Interiors Manufacturing	3	Finishing Furniture	Manufacturing Technologies	£6,000
Framework	Furniture, Furnishings and Interiors Manufacturing	3	Restoring Furniture	Manufacturing Technologies	£5,000
Framework	Furniture, Furnishings and Interiors Manufacturing	3	Fitted Furniture and Interiors	Manufacturing Technologies	£6,000
Framework	Furniture, Furnishings and Interiors Manufacturing	3	Furniture Design	Manufacturing Technologies	£6,000
Framework	Furniture, Furnishings and Interiors Manufacturing	3	Upholstery and Soft Furnishings	Manufacturing Technologies	£6,000
Framework	Furniture, Furnishings and Interiors Manufacturing	3	Supervision in the Furniture, Furnishings an	Manufacturing Technologies	£6,000
Framework	Furniture, Furnishings and Interiors Manufacturing	3	Wood Machining	Manufacturing Technologies	£6,000
Framework	Game and Wildlife Management	2	Game and Wildlife Management	Environmental Conservation	£2,000
Framework	Game and Wildlife Management	3	Game and Wildlife Management	Environmental Conservation	£2,000
Framework	Glass Industry	2	Curtain Wall Installation	Manufacturing Technologies	£3,000
Framework	Glass Industry	2	Domestic Fascia, Soffit and Bargeboard Inst	Manufacturing Technologies	£3,000
Framework	Glass Industry	2	Glass Processing	Manufacturing Technologies	£3,000
Framework	Glass Industry	2	Fenestration Installation	Manufacturing Technologies	£3,000
Framework	Glass Industry	2	Fabrication of Glass Supporting Structures	Manufacturing Technologies	£3,000
Framework	Glass Industry	2	Flat Glass Manufacture	Manufacturing Technologies	£3,000
Framework	Glass Industry	2	Glazing	Manufacturing Technologies	£3,000
Framework	Glass Industry	2	Photovoltaics Installation	Manufacturing Technologies	£3,000
Framework	Glass Industry	2	Glass Related Distribution and Warehousing	Manufacturing Technologies	£3,000
Framework	Glass Industry	3	Automotive Glazing	Manufacturing Technologies	£3,000
Framework	Glass Industry	3	Fabrication of Glass Supporting Structures	Manufacturing Technologies	£9,000
Framework	Glass Industry	3	Glazing	Manufacturing Technologies	£9,000
Framework	Glass Industry	3	Fenestration Installation	Manufacturing Technologies	£9,000
Framework	Glass Industry	3	Fenestration Surveyor	Manufacturing Technologies	£4,000
Framework	Glass Industry	3	Glass Processor	Manufacturing Technologies	£4,000
Framework	Glass Industry	3	Glass Related Distribution and Warehousing	Manufacturing Technologies	£3,500
Framework	Glass Industry	3	Glass Manufacturing	Manufacturing Technologies	£3,500
Framework	Hairdressing	2	Hairdressing	Service Enterprises	£3,000
Framework	Hairdressing	3	Hairdressing	Service Enterprises	£3,000
Framework	Health Allied Health Profession Support	3	Health Allied Health Profession Support	Health and Social Care	£2,000
Framework	Health and Social Care	2	Adult Social Care	Health and Social Care	£1,500
Framework	Health and Social Care	2	Health	Health and Social Care	£1,500
Framework	Health and Social Care	3	Adult Social Care	Health and Social Care	£2,000
Framework	Health and Social Care	3	Health	Health and Social Care	£1,500
Framework	Health Assistant Practitioner	5	Health Assistant Practitioner	Health and Social Care	£5,000
Framework	Health Clinical Healthcare Support	2	Health Clinical Healthcare Support	Health and Social Care	£2,000
Framework	Health Clinical Healthcare Support	3	Health Clinical Healthcare Support	Health and Social Care	£2,000
Framework	Health Dental Nursing	3	Health Dental Nursing	Health and Social Care	£2,500
Framework	Health Emergency Care	2	Health Emergency Care	Health and Social Care	£1,500
Framework	Health Healthcare Support Services	2	Health Healthcare Support Services	Health and Social Care	£2,000
Framework	Health Healthcare Support Services	3	Health Healthcare Support Services	Health and Social Care	£2,000
Framework	Health Maternity and Paediatric Support	3	Health Maternity and Paediatric Support	Health and Social Care	£2,000
Framework	Health Optical Retail	2	Health Optical Retail	Health and Social Care	£2,000
Framework	Health Optical Retail	3	Health Optical Retail	Health and Social Care	£2,000
Framework	Health Perioperative Support	3	Health Perioperative Support	Health and Social Care	£2,000
Framework	Health Pharmacy Services	2	Health Pharmacy Services	Health and Social Care	£2,000
Framework	Health Pharmacy Services	3	Health Pharmacy Services	Health and Social Care	£4,000
Framework	Heating and Ventilating	2	Ductwork Systems	Engineering	£6,000
Framework	Heating and Ventilating	2	Pipework Systems	Engineering	£5,000
Framework	Heating and Ventilating	2	Servicing and Maintaining H and V Systems	Engineering	£5,000
Framework	Heating and Ventilating	3	Ductwork Systems	Engineering	£6,000
Framework	Heating and Ventilating	3	Pipework Systems	Engineering	£6,000
Framework	Heating and Ventilating	3	Servicing and Maintaining H and V Systems	Engineering	£6,000
Framework	HM Forces	2	HM Forces	Public Services	£1,500
Framework	Horticulture	2	Horticulture	Horticulture and Forestry	£2,000
Framework	Horticulture	3	Horticulture	Horticulture and Forestry	£2,500
Framework	Hospitality	2	Hospitality Services	Hospitality and Catering	£1,500
Framework	Hospitality	2	Food and Beverage Services	Hospitality and Catering	£2,000
Framework	Hospitality	2	House Keeping	Hospitality and Catering	£1,500
Framework	Hospitality	2	Front of House Reception	Hospitality and Catering	£2,000
Framework	Hospitality	3	Hospitality Supervision and Leadership	Hospitality and Catering	£2,000
Framework	Hospitality	3	Hospitality Retail Outlet Supervision	Hospitality and Catering	£2,500
Framework	Hospitality Management	4	Hospitality Management	Hospitality and Catering	£2,500
Framework	Housing	2	Housing	Public Services	£1,500
Framework	Housing	3	Housing	Public Services	£2,500
Framework	Human Resource Management	5	Human Resource Management	Business Management	£2,000
Framework	Improving Operational Performance	2	Performing Engineering Operations	Manufacturing Technologies	£4,000
Framework	Improving Operational Performance	2	Performing Manufacturing Operations	Manufacturing Technologies	£3,500
Framework	Improving Operational Performance	2	Business-Improvement Techniques	Manufacturing Technologies	£3,500
Framework	Intelligence Operations	4	Defence	Public Services	£3,000
Framework	International Trade and Logistics Operations	2	International Trade and Logistics Operation	Warehousing and Distribution	£2,000
Framework	IT Application Specialist	2	IT Application Specialist	ICT for Users	£2,000
Framework	IT Application Specialist	3	IT Application Specialist	ICT for Users	£4,000

Framework (F) or standard (S)	Framework / Standard name	Level	Framework pathway name	Sector Subject Area (F) or Sector (S) Description	Funding band
Framework	IT, Software, Web and Telecoms Professionals	2	IT, Software, Web and Telecoms Professionals	ICT Practitioners	£3,500
Framework	IT, Software, Web and Telecoms Professionals	3	IT, Software, Web and Telecoms Professionals	ICT Practitioners	£9,000
Framework	IT, Software, Web and Telecoms Professionals	4	IT, Software, Web and Telecoms Professionals	ICT Practitioners	£12,000
Framework	Jewellery, Silversmithing and Allied Trades	2	Jewellery Manufacturing	Manufacturing Technologies	£3,500
Framework	Jewellery, Silversmithing and Allied Trades	3	Jewellery Manufacturing	Manufacturing Technologies	£5,000
Framework	Jewellery, Silversmithing and Allied Trades	3	Silversmithing	Manufacturing Technologies	£6,000
Framework	Jewellery, Silversmithing and Allied Trades	3	Precious Metal CAD / CAM	Manufacturing Technologies	£5,000
Framework	Journalism	3	Journalism	Media and Communication	£2,500
Framework	Laboratory and Science Technicians	2	Education Science	Science	£4,000
Framework	Laboratory and Science Technicians	2	Industrial Science	Science	£4,000
Framework	Laboratory and Science Technicians	2	Compound Analysis	Science	£4,000
Framework	Laboratory and Science Technicians	2	Clinical Analysis	Science	£3,500
Framework	Laboratory and Science Technicians	3	Education Science	Science	£9,000
Framework	Laboratory and Science Technicians	3	Industrial Science	Science	£12,000
Framework	Laboratory and Science Technicians	3	Analytical and Process Science	Science	£9,000
Framework	Land-based Engineering	2	Land-based Engineering	Agriculture	£4,000
Framework	Land-based Engineering	3	Land-based Engineering	Agriculture	£4,000
Framework	Learning and Development	3	Learning and Development	Teaching and Lecturing	£2,500
Framework	Legal Services	3	Criminal Prosecution	Law and Legal Services	£1,500
Framework	Legal Services	3	Civil Litigation	Law and Legal Services	£3,000
Framework	Legal Services	3	Employment Practice	Law and Legal Services	£3,000
Framework	Legal Services	3	Family Practice	Law and Legal Services	£3,000
Framework	Legal Services	3	Property	Law and Legal Services	£3,000
Framework	Legal Services	3	Private Client Practice	Law and Legal Services	£3,000
Framework	Legal Services	3	Paralegal Practice	Law and Legal Services	£3,000
Framework	Legal Services	4	Commercial Litigation	Law and Legal Services	£2,000
Framework	Legal Services	4	Debt Recovery and Insolvency	Law and Legal Services	£3,500
Framework	Legal Services	4	Personal Injury	Law and Legal Services	£4,000
Framework	Leisure Management	3	Leisure Management	Sport, Leisure and Recreation	£2,000
Framework	Leisure Operations and Leisure Management	2	Leisure Operations	Sport, Leisure and Recreation	£1,500
Framework	Leisure Operations and Leisure Management	3	Leisure Management	Sport, Leisure and Recreation	£2,000
Framework	Licensed Hospitality	2	Licensed Hospitality	Hospitality and Catering	£2,000
Framework	Licensed Hospitality	3	Licensed Hospitality Management	Hospitality and Catering	£2,500
Framework	Life Science and Chemical Science Professionals	4	Chemical Science Technician	Science	£5,000
Framework	Life Science and Chemical Science Professionals	4	Life Science Technician	Science	£5,000
Framework	Life Science and Chemical Science Professionals	4	Healthcare Science Technician	Science	£5,000
Framework	Life Science and Chemical Science Professionals	4	Process Development Technician	Science	£9,000
Framework	Life Science and Chemical Science Professionals	5	Chemical Science Technologist	Science	£12,000
Framework	Life Science and Chemical Science Professionals	5	Life Science Technologist	Science	£15,000
Framework	Life Science and Chemical Science Professionals	5	Healthcare Science Technologist	Science	£12,000
Framework	Life Science and Chemical Science Professionals	5	Food Science Technologist	Science	£12,000
Framework	Live Events and Promotion	2	Live Events and Promotion	Crafts, Creative Arts and Design	£1,500
Framework	Live Events and Promotion	3	Live Events and Promotion	Crafts, Creative Arts and Design	£2,500
Framework	Logistics Operations	2	Logistics Operative	Warehousing and Distribution	£1,500
Framework	Logistics Operations	2	Logistics Support Operative	Warehousing and Distribution	£1,500
Framework	Logistics Operations	3	Logistics Operations Team Leader / Section	Warehousing and Distribution	£2,500
Framework	Management	2	Team Leading	Business Management	£1,500
Framework	Management	2	Team Leading (Construction)	Business Management	£3,500
Framework	Management	3	Management	Business Management	£2,000
Framework	Management	4	Management	Business Management	£2,000
Framework	Management	5	Leadership and Management	Business Management	£2,500
Framework	Manufacturing Engineering	4	Aerospace	Manufacturing Technologies	£9,000
Framework	Manufacturing Engineering	4	Nuclear Related Technology	Manufacturing Technologies	£12,000
Framework	Manufacturing Engineering	4	Mechanical (pway 3)	Manufacturing Technologies	£12,000
Framework	Manufacturing Engineering	4	Mechanical (pway 4)	Manufacturing Technologies	£12,000
Framework	Manufacturing Engineering	4	Electrical / Electronics (pway 5)	Manufacturing Technologies	£9,000
Framework	Manufacturing Engineering	4	Electrical / Electronics (pway 6)	Manufacturing Technologies	£9,000
Framework	Manufacturing Engineering	4	Automotive	Manufacturing Technologies	£12,000
Framework	Manufacturing Engineering	4	Maintenance	Manufacturing Technologies	£9,000
Framework	Manufacturing Engineering	4	Wind Generation	Manufacturing Technologies	£9,000
Framework	Manufacturing Engineering	4	Research and Development	Manufacturing Technologies	£9,000
Framework	Manufacturing Engineering	4	Marine	Manufacturing Technologies	£9,000
Framework	Manufacturing Engineering	4	Space Engineering	Manufacturing Technologies	£9,000
Framework	Manufacturing Engineering	4	Rail Engineering	Manufacturing Technologies	£9,000
Framework	Maritime Occupations	2	Rivers, inland waterways and limited distance	Transportation Operations and Maintenance	£5,000
Framework	Maritime Occupations	2	Sea Fishing	Transportation Operations and Maintenance	£5,000
Framework	Maritime Occupations	2	Able Seafarer / Tug Rating - Deck	Transportation Operations and Maintenance	£4,000
Framework	Maritime Occupations	2	Able Seafarer / Tug Rating - Engine Room	Transportation Operations and Maintenance	£4,000
Framework	Maritime Occupations	2	Port Operations	Transportation Operations and Maintenance	£3,500
Framework	Maritime Occupations	2	Workboat Operation	Transportation Operations and Maintenance	£5,000
Framework	Maritime Occupations	2	Marinas and Boatyards	Transportation Operations and Maintenance	£4,000
Framework	Maritime Occupations	3	Merchant Navy (Deck)	Transportation Operations and Maintenance	£5,000
Framework	Maritime Occupations	3	Merchant Navy (Engineering)	Transportation Operations and Maintenance	£5,000
Framework	Maritime Occupations	3	Officer of the watch on merchant vessels of 1000 GRT or more	Transportation Operations and Maintenance	£5,000
Framework	Maritime Occupations	3	Officer of the watch on merchant vessels of 1000 GRT or more	Transportation Operations and Maintenance	£5,000
Framework	Marketing	2	Marketing	Marketing and Sales	£1,500
Framework	Marketing	3	Marketing	Marketing and Sales	£2,500
Framework	Nail Services	2	Nail Services	Service Enterprises	£2,000
Framework	Nail Services	3	Nail Services	Service Enterprises	£2,500
Framework	Nursing Assistants in a Veterinary Environment	2	Nursing Assistants in a Veterinary Environment	Animal Care and Veterinary Science	£2,000
Framework	Operations and Quality Improvement	3	Business-Improvement Techniques	Manufacturing Technologies	£4,000
Framework	Outdoor Programmes	3	Outdoor Programmes	Sport, Leisure and Recreation	£2,000
Framework	Passenger Carrying Vehicle Driving (Bus and Coach)	2	Bus and Coach	Transportation Operations and Maintenance	£3,500

Framework (F) or standard (S)	Framework / Standard name	Level	Framework pathway name	Sector Subject Area (F) or Sector (S) Description	Funding band
Framework	Photo Imaging	3	Photo Imaging	Media and Communication	£3,500
Framework	Playwork	2	Playwork	Sport, Leisure and Recreation	£1,500
Framework	Playwork	3	Playwork	Sport, Leisure and Recreation	£2,500
Framework	Plumbing and Heating	2	Plumbing	Engineering	£5,000
Framework	Plumbing and Heating	3	Domestic Plumbing and Heating Oil-Fired, S	Engineering	£9,000
Framework	Plumbing and Heating	3	Domestic Plumbing and Heating Gas-Fired V	Engineering	£9,000
Framework	Plumbing and Heating	3	Domestic Plumbing and Heating Gas-Fired V	Engineering	£9,000
Framework	Policing	3	Defence Policing	Public Services	£2,500
Framework	Print and Printed Packaging	2	Pre-Press	Manufacturing Technologies	£4,000
Framework	Print and Printed Packaging	2	Machine Printing	Manufacturing Technologies	£3,500
Framework	Print and Printed Packaging	2	Print Finishing	Manufacturing Technologies	£4,000
Framework	Print and Printed Packaging	2	Print Administration	Manufacturing Technologies	£3,500
Framework	Print and Printed Packaging	2	Reprographics	Manufacturing Technologies	£4,000
Framework	Print and Printed Packaging	3	Digital Pre-Press	Manufacturing Technologies	£9,000
Framework	Print and Printed Packaging	3	Machine Printing	Manufacturing Technologies	£9,000
Framework	Print and Printed Packaging	3	Print Finishing	Manufacturing Technologies	£9,000
Framework	Print and Printed Packaging	3	Print Administration and Management	Manufacturing Technologies	£9,000
Framework	Print and Printed Packaging	3	Carton Manufacture	Manufacturing Technologies	£9,000
Framework	Process Manufacturing	2	Process Operations	Manufacturing Technologies	£5,000
Framework	Process Manufacturing	2	Process Engineering Maintenance	Manufacturing Technologies	£6,000
Framework	Process Manufacturing	3	Process Operator / Technician	Manufacturing Technologies	£12,000
Framework	Process Manufacturing	3	Process Engineering Maintenance	Manufacturing Technologies	£9,000
Framework	Process Manufacturing	3	Downstream Operations	Manufacturing Technologies	£12,000
Framework	Professional Development for Work Based Learning Pra	4	Workbased Learning Practitioners	Teaching and Lecturing	£4,000
Framework	Professional Development for Work Based Learning Pra	5	Workbased Learning Practitioners	Teaching and Lecturing	£4,000
Framework	Professional Services	4	Audit	Accounting and Finance	£3,000
Framework	Professional Services	4	Tax	Accounting and Finance	£3,000
Framework	Professional Services	4	Management Consulting	Accounting and Finance	£3,000
Framework	Professional Services	4	Management Accounting	Accounting and Finance	£3,000
Framework	Project Management	4	Project Management	Business Management	£3,000
Framework	Property Services	2	Sale of Residential Property	Service Enterprises	£1,500
Framework	Property Services	2	Residential Letting and Management	Service Enterprises	£1,500
Framework	Property Services	3	Sale of Residential Property	Service Enterprises	£2,500
Framework	Property Services	3	Residential Letting and Management	Service Enterprises	£2,500
Framework	Providing Financial Services	2	General Insurance	Accounting and Finance	£1,500
Framework	Providing Financial Services	2	Banking	Accounting and Finance	£2,000
Framework	Providing Financial Services	2	Life, Pensions and Investments	Accounting and Finance	£2,000
Framework	Providing Financial Services	2	Financing and Credit	Accounting and Finance	£2,000
Framework	Providing Financial Services	2	Administration for Mortgage and / or Financ	Accounting and Finance	£2,000
Framework	Providing Financial Services	2	Investment Operations	Accounting and Finance	£2,000
Framework	Providing Financial Services	2	Customer Payments for Financial Products a	Accounting and Finance	£2,000
Framework	Providing Financial Services	2	Debt Collections	Accounting and Finance	£2,000
Framework	Providing Financial Services	3	General Insurance	Accounting and Finance	£3,000
Framework	Providing Financial Services	3	Banking	Accounting and Finance	£3,000
Framework	Providing Financial Services	3	Life, Pensions and Investments	Accounting and Finance	£3,000
Framework	Providing Financial Services	3	Financing and Credit	Accounting and Finance	£3,500
Framework	Providing Financial Services	3	Administration for Mortgage and / or Financ	Accounting and Finance	£3,000
Framework	Providing Financial Services	3	Investment Operations	Accounting and Finance	£3,500
Framework	Providing Financial Services	3	Pensions Administration	Accounting and Finance	£3,500
Framework	Providing Financial Services	3	Debt Collections	Accounting and Finance	£3,500
Framework	Providing Financial Services	3	Customer Payments for Financial Products a	Accounting and Finance	£3,500
Framework	Providing Security Services	2	Providing Security Services	Public Services	£1,500
Framework	Rail Infrastructure Engineering	2	Track Maintenance	Manufacturing Technologies	£5,000
Framework	Rail Infrastructure Engineering	2	Electrification Maintenance	Manufacturing Technologies	£4,000
Framework	Rail Infrastructure Engineering	3	Signalling	Manufacturing Technologies	£12,000
Framework	Rail Infrastructure Engineering	3	Track	Manufacturing Technologies	£12,000
Framework	Rail Infrastructure Engineering	3	Telecoms	Manufacturing Technologies	£12,000
Framework	Rail Infrastructure Engineering	3	Electrification	Manufacturing Technologies	£12,000
Framework	Rail Services	2	Passenger Services	Transportation Operations and Maintenance	£3,500
Framework	Rail Services	2	Driving	Transportation Operations and Maintenance	£3,000
Framework	Rail Services	2	Signal Operations	Transportation Operations and Maintenance	£3,500
Framework	Rail Services	2	Shunting	Transportation Operations and Maintenance	£3,500
Framework	Rail Services	2	Control Room Operations	Transportation Operations and Maintenance	£3,500
Framework	Rail Services	3	Rail Supervision	Transportation Operations and Maintenance	£1,500
Framework	Rail Traction and Rolling Stock Engineering	2	Traction and Rolling Stock	Manufacturing Technologies	£3,500
Framework	Rail Traction and Rolling Stock Engineering	3	Traction and Rolling Stock	Manufacturing Technologies	£12,000
Framework	Recruitment	2	Recruitment Resourcing	Administration	£2,000
Framework	Recruitment	3	Recruitment	Administration	£1,500
Framework	Recruitment	4	Recruitment	Administration	£1,500
Framework	Refrigeration and Air Conditioning	2	Refrigeration	Engineering	£4,000
Framework	Refrigeration and Air Conditioning	2	Air Conditioning	Engineering	£4,000
Framework	Refrigeration and Air Conditioning	3	Refrigeration	Engineering	£6,000
Framework	Refrigeration and Air Conditioning	3	Refrigeration Service and Maintenance	Engineering	£6,000
Framework	Refrigeration and Air Conditioning	3	Air Conditioning	Engineering	£6,000
Framework	Refrigeration and Air Conditioning	3	Air Conditioning Service and Maintenance	Engineering	£6,000
Framework	Retail	2	Retail	Retailing and Wholesaling	£1,500
Framework	Retail	2	Specialist	Retailing and Wholesaling	£1,500
Framework	Retail	3	Sales Professional	Retailing and Wholesaling	£1,500
Framework	Retail	3	Visual Merchandising	Retailing and Wholesaling	£1,500
Framework	Retail	3	Management	Retailing and Wholesaling	£1,500
Framework	Retail	3	Multi-channel Retail	Retailing and Wholesaling	£1,500
Framework	Sales and Telesales	2	Sales and Telesales	Marketing and Sales	£1,500
Framework	Sales and Telesales	3	Sales and Telesales	Marketing and Sales	£2,500

Framework (F) or standard (S)	Framework / Standard name	Level	Framework pathway name	Sector Subject Area (F) or Sector (S) Description	Funding band
Framework	Security Systems	2	Security Systems	Public Services	£2,500
Framework	Security Systems	3	Security Systems	Public Services	£6,000
Framework	Signmaking	2	Signmaker / Installer	Manufacturing Technologies	£2,500
Framework	Signmaking	3	Signmaker / Technician	Manufacturing Technologies	£12,000
Framework	Smart Meter Installations (Dual Fuel)	2	Dual Fuel	Engineering	£3,500
Framework	Social Media and Digital Marketing	3	Social Media	Marketing and Sales	£3,000
Framework	Social Media and Digital Marketing	3	Digital Marketing	Marketing and Sales	£4,000
Framework	Social Media and Digital Marketing	4	Digital Marketing	Marketing and Sales	£4,000
Framework	Spectator Safety	2	Spectator Safety	Sport, Leisure and Recreation	£2,000
Framework	Spectator Safety	3	Advanced Spectator Safety	Sport, Leisure and Recreation	£1,500
Framework	Sporting Excellence	3	Sporting Excellence Pathway One	Sport, Leisure and Recreation	£5,000
Framework	Sporting Excellence	3	Sporting Excellence Pathway Two	Sport, Leisure and Recreation	£2,500
Framework	Sports Development	3	Sports Development	Sport, Leisure and Recreation	£2,000
Framework	Supply Chain Management	2	Supply Chain Operations	Warehousing and Distribution	£1,500
Framework	Supply Chain Management	3	Supply Chain Management	Warehousing and Distribution	£1,500
Framework	Supply Chain Management	5	Supply Chain Specialist	Warehousing and Distribution	£2,000
Framework	Supply Chain Management	5	International Supply Chain Manager	Warehousing and Distribution	£6,000
Framework	Supporting Teaching and Learning in Physical Education	3	Supporting Teaching and Learning in Physical Education	Sport, Leisure and Recreation	£3,000
Framework	Supporting Teaching and Learning in Schools	2	Supporting Teaching and Learning in Schools	Direct Learning Support	£2,000
Framework	Supporting Teaching and Learning in Schools	3	Supporting Teaching and Learning in Schools	Direct Learning Support	£2,500
Framework	Surveying	3	Surveying	Building and Construction	£6,000
Framework	Sustainable Resource Management	2	Sustainable Resource Management	Public Services	£1,500
Framework	Sustainable Resource Management	3	Sustainable Resource Management	Public Services	£2,000
Framework	Technical Theatre, Lighting, Sound and Stage	2	Lighting	Crafts, Creative Arts and Design	£2,000
Framework	Technical Theatre, Lighting, Sound and Stage	2	Sound	Crafts, Creative Arts and Design	£2,000
Framework	Technical Theatre, Lighting, Sound and Stage	2	Stage	Crafts, Creative Arts and Design	£2,000
Framework	Technical Theatre, Lighting, Sound and Stage	3	Lighting	Crafts, Creative Arts and Design	£2,500
Framework	Technical Theatre, Lighting, Sound and Stage	3	Sound	Crafts, Creative Arts and Design	£2,500
Framework	Technical Theatre, Lighting, Sound and Stage	3	Stage	Crafts, Creative Arts and Design	£2,500
Framework	The Gas Industry	2	Network Construction Operations (Gas)	Engineering	£3,500
Framework	The Gas Industry	3	Gas Fired Wet Central Heating	Engineering	£9,000
Framework	The Gas Industry	3	Gas Heating and Energy Efficiency	Engineering	£12,000
Framework	The Power Sector	2	Power Transmission and Distribution	Engineering	£6,000
Framework	The Power Sector	3	Wind Turbine Installation and Commissioning	Engineering	£12,000
Framework	The Power Sector	3	Power Generation	Engineering	£12,000
Framework	The Power Sector	3	Power Transmission and Distribution	Engineering	£9,000
Framework	The Power Sector	3	Wind Turbine Operations and Maintenance	Engineering	£12,000
Framework	The Water Industry	2	Water Industry	Engineering	£3,500
Framework	The Water Industry	2	Sewerage Operations and Maintenance	Engineering	£3,000
Framework	The Water Industry	3	Water Industry	Engineering	£12,000
Framework	The Water Industry	4	Utilities Network Planning and Management	Engineering	£9,000
Framework	Trade Business Services	2	Trade Business Services	Retailing and Wholesaling	£2,000
Framework	Traffic Office	2	Traffic Office Clerk	Warehousing and Distribution	£1,500
Framework	Traffic Office	3	Traffic Office Manager	Warehousing and Distribution	£2,500
Framework	Travel Services	2	Leisure and Business	Travel and Tourism	£2,000
Framework	Travel Services	2	Tour Operators - Head Office	Travel and Tourism	£2,000
Framework	Travel Services	2	Tour Operators - Field Staff	Travel and Tourism	£2,000
Framework	Travel Services	3	Leisure and Business	Travel and Tourism	£3,000
Framework	Travel Services	3	Tour Operators - Head Office	Travel and Tourism	£3,000
Framework	Travel Services	3	Tour Operators - Field Staff	Travel and Tourism	£3,000
Framework	Trees and Timber	2	Trees and Timber	Horticulture and Forestry	£1,500
Framework	Trees and Timber	3	Trees and Timber	Horticulture and Forestry	£1,500
Framework	Vehicle Body and Paint	2	Mechanical, Electrical and Trim	Transportation Operations and Maintenance	£5,000
Framework	Vehicle Body and Paint	2	Body Building	Transportation Operations and Maintenance	£4,000
Framework	Vehicle Body and Paint	2	Body Repair	Transportation Operations and Maintenance	£6,000
Framework	Vehicle Body and Paint	2	Body Refinishing	Transportation Operations and Maintenance	£5,000
Framework	Vehicle Body and Paint	2	Automotive Glazing	Transportation Operations and Maintenance	£3,000
Framework	Vehicle Body and Paint	2	Windscreen Repair	Transportation Operations and Maintenance	£3,000
Framework	Vehicle Body and Paint	3	Mechanical, Electrical and Trim	Transportation Operations and Maintenance	£5,000
Framework	Vehicle Body and Paint	3	Body Building	Transportation Operations and Maintenance	£6,000
Framework	Vehicle Body and Paint	3	Body Repair	Transportation Operations and Maintenance	£6,000
Framework	Vehicle Body and Paint	3	Body Refinishing	Transportation Operations and Maintenance	£6,000
Framework	Vehicle Body and Paint	3	Vehicle Damage Assessment	Transportation Operations and Maintenance	£2,500
Framework	Vehicle Fitting	2	Fast Fit	Transportation Operations and Maintenance	£5,000
Framework	Vehicle Fitting	2	Specialist Tyre Fitting	Transportation Operations and Maintenance	£5,000
Framework	Vehicle Fitting	3	Fast Fit	Transportation Operations and Maintenance	£5,000
Framework	Vehicle Maintenance and Repair	2	Light Vehicle	Transportation Operations and Maintenance	£5,000
Framework	Vehicle Maintenance and Repair	2	Heavy Vehicle	Transportation Operations and Maintenance	£6,000
Framework	Vehicle Maintenance and Repair	2	Motorcycle	Transportation Operations and Maintenance	£5,000
Framework	Vehicle Maintenance and Repair	2	Auto Electrics / Mobile Electrics	Transportation Operations and Maintenance	£5,000
Framework	Vehicle Maintenance and Repair	2	Heavy Vehicle Trailer	Transportation Operations and Maintenance	£5,000
Framework	Vehicle Maintenance and Repair	2	Lift Truck	Transportation Operations and Maintenance	£6,000
Framework	Vehicle Maintenance and Repair	2	Caravan and Motorhome	Transportation Operations and Maintenance	£3,000
Framework	Vehicle Maintenance and Repair	3	Light Vehicle	Transportation Operations and Maintenance	£6,000
Framework	Vehicle Maintenance and Repair	3	Heavy Vehicle	Transportation Operations and Maintenance	£6,000
Framework	Vehicle Maintenance and Repair	3	Motorcycle	Transportation Operations and Maintenance	£6,000
Framework	Vehicle Maintenance and Repair	3	Auto Electrics / Mobile Electrics	Transportation Operations and Maintenance	£6,000
Framework	Vehicle Maintenance and Repair	3	Lift Truck	Transportation Operations and Maintenance	£6,000
Framework	Vehicle Maintenance and Repair	3	Caravan and Motorhome	Transportation Operations and Maintenance	£3,500
Framework	Vehicle Parts	2	Vehicle Parts	Transportation Operations and Maintenance	£5,000
Framework	Vehicle Parts	3	Vehicle Parts	Transportation Operations and Maintenance	£6,000
Framework	Vehicle Restoration	2	Vehicle Restoration	Transportation Operations and Maintenance	£5,000
Framework	Vehicle Restoration	3	Vehicle Restoration	Transportation Operations and Maintenance	£6,000

Framework (F) or standard (S)	Framework / Standard name	Level	Framework pathway name	Sector Subject Area (F) or Sector (S) Description	Funding band
Framework	Vehicle Sales	2	Vehicle Sales	Transportation Operations and Maintenance	£3,000
Framework	Vehicle Sales	3	Vehicle Sales	Transportation Operations and Maintenance	£4,000
Framework	Veterinary Nursing	3	Small Animal	Animal Care and Veterinary Science	£6,000
Framework	Veterinary Nursing	3	Equine	Animal Care and Veterinary Science	£5,000
Framework	Warehousing and Storage	2	Warehouse Operative	Warehousing and Distribution	£1,500
Framework	Warehousing and Storage	3	Senior Warehouse Person / Team Leader	Warehousing and Distribution	£2,000
Framework	Youth Work	2	Youth Work	Health and Social Care	£1,500
Framework	Youth Work	3	Youth Work	Health and Social Care	£2,500
Standard	Able Seafarer (Deck)	2	-	Maritime	£9,000
Standard	Actuarial Technician	4	-	Actuarial	£15,000
Standard	Adult Care Worker	2	-	Adult care	£3,000
Standard	Aerospace Engineer	6	-	Aerospace	£27,000
Standard	Aerospace Manufacturing Electrical, Mechanical and S	3	-	Aerospace	£24,000
Standard	Aerospace Manufacturing Fitter	3	-	Aerospace	£24,000
Standard	Aerospace Software Development Engineer	6	-	Aerospace	£27,000
Standard	Aircraft Maintenance Certifying Engineer	4	-	Airworthiness	£24,000
Standard	Aircraft Maintenance Fitter / Technician (fixed and ro	3	-	Airworthiness	£24,000
Standard	Airsides Operator	2	-	Aviation	£3,000
Standard	Airworthiness Planning, Quality and Safety Technician	3	-	Airworthiness	£24,000
Standard	Assistant Accountant	3	-	Accounting	£9,000
Standard	Assistant Technical Director (visual effects)	4	-	Visual Effects	£9,000
Standard	Associate Project Manager	4	-	Project Management	£9,000
Standard	Aviation Ground Operative	2	-	Aviation	£3,000
Standard	Aviation Ground Specialist	3	-	Aviation	£3,000
Standard	Aviation Maintenance Mechanic (Military)	2	-	Aerospace	£12,000
Standard	Aviation Operations Manager	4	-	Aviation	£5,000
Standard	Bespoke Tailor and Cutter	5	-	Bespoke tailoring	£5,000
Standard	Boatbuilder	3	-	Boatbuilding	£27,000
Standard	Broadcast Production Assistant	3	-	TV Production & Broadcasting	£9,000
Standard	Bus and Coach Engineering Manager	4	-	Bus, Coach and HGV	£9,000
Standard	Bus and Coach Engineering Technician	3	-	Bus, Coach and HGV	£18,000
Standard	Butcher	2	-	Butchery	£9,000
Standard	Chartered Legal Executive	6	-	Law	£12,000
Standard	Chartered Manager Degree Apprenticeship	6	-	Leadership & Management	£27,000
Standard	Chartered Surveyor	6	-	Surveying	£27,000
Standard	Commis Chef	2	-	Hospitality	£9,000
Standard	Compliance / Risk Officer	3	-	Financial Services	£9,000
Standard	Control / Technical Support Engineer	6	-	Automotive	£27,000
Standard	Conveyancing Technician	4	-	Conveyancing and probate	£9,000
Standard	Credit Controller/Collector	2	-	Financial Services	£5,000
Standard	Customer Service Practitioner	2	-	Customer service	£4,000
Standard	Cyber Intrusion Analyst	4	-	Digital Industries	£18,000
Standard	Cyber Security Technologist	4	-	Digital Industries	£18,000
Standard	Data Analyst	4	-	Digital Industries	£15,000
Standard	Dental Laboratory Assistant	3	-	Dental health	£5,000
Standard	Dental Nurse	3	-	Dental health	£9,000
Standard	Dental Practice Manager	4	-	Dental health	£9,000
Standard	Dental Technician	5	-	Dental health	£18,000
Standard	Digital Marketer	3	-	Digital Industries	£9,000
Standard	Digital and Technology Solutions Professional	6	-	Digital Industries	£27,000
Standard	Dual Fuel Smart Meter Installer	2	-	Energy and Utilities	£12,000
Standard	Electrical Power Protection and Plant Commissioning E	4	-	Energy and Utilities	£27,000
Standard	Electrical / Electronic Technical Support Engineer	6	-	Automotive	£27,000
Standard	Embedded Electronic Systems Design and Developmen	6	-	Electronic Systems	£27,000
Standard	Engineering Design and Draughtsperson	3	-	Engineering, Design and Draughting	£27,000
Standard	Financial Services Administrator	3	-	Financial Services	£12,000
Standard	Financial Services Customer Adviser	2	-	Financial Services	£4,000
Standard	Fire Emergency and Security Systems Technician	3	-	Fire Emergency and Security Systems	£18,000
Standard	Food and Drink Advanced Process Operator	3	-	Food and Drink	£9,000
Standard	Food and Drink Process Operator	2	-	Food and Drink	£5,000
Standard	Food Technologist	3	-	Food and Drink	£18,000
Standard	Food and Drink Maintenance Engineer	3	-	Food and Drink	£27,000
Standard	Furniture Manufacturer	2	-	Furniture	£9,000
Standard	Gas Engineering	3	-	Energy and Utilities	£27,000
Standard	Gas Network Craftsperson	3	-	Energy and Utilities	£27,000
Standard	Gas Network Team Leader	2	-	Energy and Utilities	£9,000
Standard	Golf Greenkeeper	2	-	Golf Greenkeeping (horticulture)	£6,000
Standard	Healthcare Assistant Practitioner	5	-	Healthcare	£12,000
Standard	Healthcare Science Assistant	2	-	Healthcare	£5,000
Standard	Healthcare Support Worker	2	-	Healthcare	£3,000
Standard	Heavy Vehicle Service and Maintenance Technician	3	-	Bus, Coach and HGV	£18,000
Standard	Highway Electrical Maintenance and Installation Oper	2	-	Construction	£9,000
Standard	Highway Electrician / Service Operative	3	-	Construction	£9,000
Standard	HM Forces Serviceperson (Public Services)	2	-	HM Armed Forces	£2,500
Standard	Hospitality Supervisor	3	-	Hospitality	£5,000
Standard	Hospitality Team Member	2	-	Hospitality	£5,000
Standard	Housing/Property Management	3	-	Housing	£9,000
Standard	Housing/Property Management Assistant	2	-	Housing	£3,000
Standard	Infrastructure Technician	3	-	Digital Industries	£15,000
Standard	Installation Electrician/Maintenance Electrician	3	-	Electrotechnical	£18,000
Standard	Insurance Practitioner	3	-	Insurance	£9,000
Standard	Insurance Professional	4	-	Insurance	£9,000
Standard	Investment Operations Administrator	2	-	Financial Services	£5,000

Framework (F) or standard (S)	Framework / Standard name	Level	Framework pathway name	Sector Subject Area (F) or Sector (S) Description	Funding band
Standard	Investment Operations Specialist	4	-	Financial Services	£9,000
Standard	Investment Operations Technician	3	-	Financial Services	£9,000
Standard	IT Technical Salesperson	3	-	Digital Industries	£12,000
Standard	Junior 2D Artist (visual effects)	4	-	Visual Effects	£9,000
Standard	Junior Management Consultant	4	-	Management Consultancy	£9,000
Standard	Junior Energy Manager	3	-	Energy Management	£9,000
Standard	Junior Journalist	3	-	Media	£12,000
Standard	Laboratory Scientist	5	-	Life and Industrial Sciences	£27,000
Standard	Laboratory Technician	3	-	Life and Industrial Sciences	£21,000
Standard	Land-based Service Engineer	2	-	Land-based engineering	£18,000
Standard	Land-based Service Engineering Technician	3	-	Land-based engineering	£27,000
Standard	Large Goods Vehicle (LGV) Driver	2	-	Logistics and Supply Chain	£5,000
Standard	Lead Adult Care Worker	3	-	Adult care	£3,000
Standard	Licensed Conveyancer	6	-	Conveyancing and probate	£9,000
Standard	Live Event Rigger	3	-	Live Events	£9,000
Standard	Machinist (Advanced Manufacturing Engineering)	3	-	Advanced manufacturing	£24,000
Standard	Maintenance and Operations Engineering Technician	3	-	Energy and Utilities	£27,000
Standard	Manufacturing Engineer	6	-	Automotive	£27,000
Standard	Mechatronics Maintenance Technician	3	-	Automotive	£24,000
Standard	Mortgage Adviser	3	-	Financial Services	£9,000
Standard	Motor Vehicle Service and Maintenance Technician (light)	3	-	Automotive retail	£18,000
Standard	Network Engineer	4	-	Digital Industries	£18,000
Standard	Non-destructive Testing (NDT) Operator	2	-	Non-destructive Testing	£12,000
Standard	Non-destructive Testing Engineering Technician	3	-	Non-destructive Testing	£18,000
Standard	Nuclear Health Physics Monitor	2	-	Nuclear	£9,000
Standard	Nuclear Scientist and Nuclear Engineer	6	-	Nuclear	£27,000
Standard	Nuclear Welding Inspection Technician	4	-	Nuclear	£12,000
Standard	Operations/Departmental Manager	5	-	Leadership & Management	£9,000
Standard	Outside Broadcasting Engineer	7	-	TV Production & Broadcasting	£9,000
Standard	Papermaker	3	-	Papermaking	£6,000
Standard	Paralegal	3	-	Law	£9,000
Standard	Paraplanner	4	-	Financial Services	£9,000
Standard	Power Network Craftsperson	3	-	Energy and Utilities	£27,000
Standard	Product Design and Development Engineer	6	-	Automotive	£27,000
Standard	Product Design and Development Technician	3	-	Automotive	£27,000
Standard	Professional Accounting Taxation Technician	4	-	Accounting	£9,000
Standard	Property Maintenance Operative	2	-	Property Services	£9,000
Standard	Public Sector Commercial Professional	4	-	Public Sector	£6,000
Standard	Public Service Operational Delivery Officer	3	-	Public Service	£3,000
Standard	Rail Engineering Advanced Technician	4	-	Rail Engineering	£27,000
Standard	Rail Engineering Operative	2	-	Rail Engineering	£12,000
Standard	Rail Engineering Technician	3	-	Rail Engineering	£27,000
Standard	Railway Engineering Design Technician	3	-	Rail Design	£18,000
Standard	Refrigeration Air Conditioning and Heat Pump Engineer	3	-	Refrigeration, Air Conditioning and Heat Pump	£9,000
Standard	Relationship Manager (Banking)	6	-	Financial Services	£27,000
Standard	Retail Manager	4	-	Retail	£6,000
Standard	Retail Team Leader	3	-	Retail	£5,000
Standard	Retailer	2	-	Retail	£5,000
Standard	Science Industry Maintenance Technician	3	-	Life and Industrial Sciences	£27,000
Standard	Science Manufacturing Technician	3	-	Life and Industrial Sciences	£27,000
Standard	Senior Chef Production Cooking	3	-	Hospitality	£5,000
Standard	Senior Compliance / Risk Specialist	6	-	Financial Services	£27,000
Standard	Senior Financial Services Customer Adviser	3	-	Financial Services	£9,000
Standard	Senior Housing/Property Management	4	-	Housing	£9,000
Standard	Software Tester	4	-	Digital Industries	£18,000
Standard	Software Developer	4	-	Digital Industries	£18,000
Standard	Solicitor	7	-	Law	£21,000
Standard	Sports Turf Operative	2	-	Groundsmanship	£5,000
Standard	Supply Chain Operator	2	-	Logistics and Supply Chain	£3,000
Standard	Supply Chain Warehouse Operative	2	-	Logistics and Supply Chain	£3,000
Standard	Surveying Technician	3	-	Surveying	£9,000
Standard	Survival Equipment Fitter	3	-	Aerospace	£27,000
Standard	Systems Engineering Masters Level	7	-	Defence	£27,000
Standard	Team Leader/Supervisor	3	-	Leadership & Management	£5,000
Standard	Transport Planning Technician	3	-	Transport	£12,000
Standard	Travel Consultant	3	-	Travel	£9,000
Standard	Unified Communications Trouble Shooter	4	-	Digital Industries	£18,000
Standard	Utilities Engineering Technician	3	-	Energy and Utilities	£27,000
Standard	Water Process Technician	3	-	Energy and Utilities	£12,000
Standard	Welding	2	-	Welding	£9,000
Standard	Welding	3	-	Welding	£12,000
Standard	Workplace Pensions (Administrator or Consultant)	3	-	Financial Services	£9,000

Directorate	Service Area	Headcount	2.3%
Education Schools		4046	93.1
	Abbey Manor College	78	1.8
	Adamsrill Primary School	77	1.8
	Addey and Stanhope School	95	2.2
	Ashmead Primary School	35	0.8
	Athelney Primary School	83	1.9
	Baring Primary School	43	1.0
	Beecroft Garden Primary School	60	1.4
	Bonus Pastor Secondary School	96	2.2
	Brindishe Green Primary School	75	1.7
	Brindishe Lee Primary School	33	0.8
	Brindishe Manor	57	1.3
	Chelwood Nursery School	26	0.6
	Childeric Primary School	73	1.7
	Clyde Nursery School	38	0.9
	Conisborough College	140	3.2
	Coopers Lane Primary School	107	2.5
	Dalmain Primary School	60	1.4
	Deptford Green Secondary School	114	2.6
	Downderry Primary School	62	1.4
	Drumbeat ASD School	132	3.0
	Edmund Waller Primary School	62	1.4
	Elfrida Primary School	71	1.6
	Eliot Bank Primary School	62	1.4
	Fairlawn Primary School	58	1.3
	Forest Hill Secondary School	145	3.3
	Forster Park Primary School	86	2.0
	Gordonbrock Primary School	77	1.8
	Greenvale School	82	1.9
	Grinling Gibbons Primary School	48	1.1
	Haseltine Primary School	83	1.9
	Holbeach Primary School	86	2.0
	Horniman Primary School	35	0.8
	John Ball Primary School	72	1.7
	John Stainer Primary School	48	1.1
	Kelvin Grove Primary School	104	2.4
	Kilmorie Primary School	88	2.0
	Launcelot Primary School	69	1.6
	Lucas Vale Primary School	64	1.5
	Marvels Lane Primary School	73	1.7
	Myatt Garden Primary School	65	1.5
	New Woodlands School	63	1.4
	Perrymount Primary School	50	1.2
	Rangefield Primary School	73	1.7
	Rathfern Primary School	73	1.7
	Rushey Green School	117	2.7
	Sandhurst Infant School	49	1.1

Directorate	Service Area	Headcount	2.3%
Education Schools		4046	93.1
	Sandhurst Junior School	47	1.1
	Sedgehill School	142	3.3
	Sir Francis Drake Primary School	36	0.8
	Stillness Infant School	40	0.9
	Stillness Junior School	33	0.8
	Sydenham Secondary School	164	3.8
	Torridon Infant School	50	1.2
	Torridon Junior School	48	1.1
	Trinity Lewisham CE Secondary School	99	2.3
		4046	93.1

Schools Forum			
REPORT TITLE	Off Payroll Working In The Public Sector - IR35		
KEY DECISION		Item No.	6
CLASS		Date	16 March 2017

1. Purpose of the Report

To brief the Forum on the reform of the legislation taking effect from 6th April 2017 relating to contractors working via intermediaries and providing their services to public authorities. Often known as IR35 in the public sector.

2. Background

- 2.1 IR35 is the name given to the government's intermediaries tax legislation which focuses on identifying 'disguised employees', being individuals who are providing services to a client through an intermediary company, such as their own personal service company (PSC), but whose relationship with the client would be one of employment were it not for the presence of the intermediary. Where this is the case, the existing IR35 rules require the intermediary to deduct and make payment of the equivalent taxes as would be payable by and for an employee.

3. What is the change?

- 3.1 The main change is that the employer will be required to determine whether the IR35 rules apply to agency workers, interims and contractors. The employer will also become responsible for carrying out an employment status test. Where this test is met, the organisation (LBL employer or supplying agency) that pays the worker becomes responsible for deducting and paying relevant tax and National Insurance, in the same way as for direct employees of the Council. This will mainly affect workers who operate as a PSC.
- 3.2 Off payroll workers can be engaged in the following ways:-
1. An agency worker or interim contractor through an agency
 2. A worker that is invoicing the school directly

4. What are the implications for Lewisham Schools?

- 4.1 HMRC may impose financial penalties if workers are not designated correctly therefore it is important that employers fully understand the legislation and carry out the employment status test to help ensure that the worker is paying the correct amount of tax. It is likely that HMRC will take any necessary action against the employer, however the employer may decide to pass any penalty on to the relevant school if the school has made an incorrect judgement. A digital employment status tool is now available at the following link: - <https://www.tax.service.gov.uk/check-employment-status-for-tax/setup>
It is important for school staff to be familiar with the tool and how it works.
- 4.2 Employers may find that where a person has been engaged via an agency but is providing services through their own PSC, the agency increases their rate to the employer. This is because they will be responsible for employers National Insurance contributions.
- 4.3 The most important fact is that the employer is responsible for determining whether the work falls inside IR35 legislation, even if it is then able to pass the responsibility for deducting the taxes on to an agency.
- 4.4 It is very likely that most interim/contractor roles required in schools are those that can and are carried out by direct employees and will fall within IR35. For example, a job would generally have to be time limited, with specified work and specified outcomes to fall outside of IR35. There is also an expectation that the work would be paid for on completion rather than on a regular basis.

Recommendation

5. It is recommended that schools become familiar with the employment status test tool but that they confirm their findings with Schools' HR staff for absolute clarity and to avoid errors.

Diane Parkhouse
Schools' HR team Business Manager

March 2017

Schools Forum			
REPORT TITLE	New Woodlands – Funding Places 2017-2018		
KEY DECISION	Yes	Item No.	7
CLASS	Part 1	Date	17 January 2017

1. Purpose of the Report

To consider the recommendations of the High Needs sub group on the future funding of places at New Woodlands in light of the Transition Plan in place to move the school into its legal status as a special school.

2. Recommendation

The Schools Forum

- 2.1. Agree that proposals as set out in paragraph 6 as the new arrangement for funding places at New Woodlands School.
- 2.2 To note that the SEN children on roll at New Woodlands will be banded with the new universal banding system as in line with the other Specials Schools which will be implemented from the 1 April 2017.
- 2.3 The new funding rates for a place at New Woodlands School should be based on the theory that money should follow the pupil as set out below and that schools contribute to the cost of the placement on a pro-rata basis.

Basic Entitlement

- i) Primary - £3,726
- ii) Secondary - £5,125

(Figures based on 2016/2017 entitlement, maybe subject to change for 2017/2018)

Plus Pupil Premium

- | | |
|-----------|--------|
| Primary | £935 |
| Secondary | £1,320 |

- 2.4 To agree that the High Needs Sub Group continue to monitor the progress of the Transition Plan for New Woodlands and that an annual report be presented to Schools Forum by autumn 2017.

3. Background – New Woodlands

- 3.1 The historical context is that New Woodlands was awarded the ‘Power to Innovate’ in 2007 to 2013. Under this initiative the school was able

to offer places for children without a statement of SEN and encouraged to support those children who experienced difficulty within a mainstream setting in particular those who presented behavioural difficulties and were at risk of exclusion. It is evident that the provision at New Woodlands has been instrumental in ensuring that primary exclusions be kept to a minimum.

- 3.2 Places at New Woodlands have been funded through the HNB as based on 112 LA commissioned places. In addition to the funding received from the LA New Woodlands also have had a SLA in place which included an annual membership fee and a separate charge for a pupil place if required.

Annual Membership Fee 2016-2017	
Primary	£750
Secondary	£1,500

Due to the pressure on the HNB and Lewisham has taken steps to ensure that there is scrutiny and accountability in respect of the distribution of the funding.

- 3.3 New Woodlands whilst retaining the status as a special schools has operated as a pupil referral unit. In autumn 2015 it was agreed that a review of alternative provision in Lewisham should be undertaken. The Alternative Provision Review revealed that pupils on roll had a very wide range of needs and it was recommended that an audit of the children attending New Woodlands should be undertaken. The audit was conducted on 26th and 27th May 2016.
- 3.4 Since undertaking the audit the LA have worked closely with new Head teacher, Senior Leadership Team and Chair of Governors on proposals to put in place a transition plan to re-establish New Woodlands School as special school.
- 3.5 It was agreed that transitional arrangements be put in place to re-dress the status of New Woodlands School as a special school. In line with the legislation that children in a special school for more than six months should have a statement or EHCP or for those who require an assessment place. Schools have been reassured that this does not mean that children currently on dual roll at New Woodlands will not have a place but that there will be a phased transition plan over the next 2-3 years to ensure minimum disruption to children attending the provision.

- 3.6 The LA is now the gatekeeper for referrals to New Woodlands in line with national and local admissions arrangements. This was implemented in September 2016 to assist the school through the transition and to enable transparency.
- 3.7. The criteria for the specialism of New Woodlands need to be clearly identified based on need and demand in the borough. Information on the need and gaps in provision needs to be strategically mapped out urgently in order to give a clearer steer on the criteria that should be assigned to this special school.

4 Work in progress

The LA has now set up an Advisory Board to work NW on the Transition Plan. The Advisory Board consist of primary and secondary heads and deputies and the NW SLT and is being led by the Consultant Senior Education Advisor. (Membership and Draft TOR is attached).

5 Transition Plan 2016-2017

In September 2016 the total number of children on roll at NW with an EHCP was 11. Currently (February 2017) there are 25 children on roll with an EHCP this increase is due to the dedicated work from the CWCN Service working with NW to ensure that those children who have been in the provision with undiagnosed primary needs and not making progress are prioritised for an EHC assessment. In addition the LA SEN Panel is now able to offer places for children with an EHCP for SEBD or SEMH at NW as suitable provision to meet their needs.

6 New Funding Arrangements

As of April 2017 the new funding arrangement for a place at NW will be as follows:

LA commissioned places 112	
112 x £10,000 base funding	£1,120,000
112 x £ 6,200 top-up funding	£ 694,400
Total	£1,814,400

School will no longer have to pay a membership fee to access a place at the school. Places will continue to be accessed via the LA SEN Panel or FAP.

For children on dual roll New Woodlands will charge schools the AWPU plus any pupil premium. It is proposed that the weekly amounts will be invoiced to the schools based on place led funding which the mainstream school receives to follow the pupil whilst on dual roll at NW. An example of this is set out below.

- £97 per week (KS1/2)
- £129 per week (KS3)

Plus any Pupil Premium received (predicted figures will be made available).

It has been agreed that NW will no longer have an SLA for 2017-2018 as the Head and the SLT have decided to focus on improving the provision within the school by upskilling staff through a targeted training programme which will be delivered across the school.

7. SEND Banding

For those children who have an EHCP they will be banded in line with the revised system. The review of all those with EHCP is currently being undertaken in February and early March ready for implementation as of April 2017. All children on roll receive in 2017-2018 equates to every child being banded at Band E. Any child that is banded above at Band F or G which led to a higher top-up rate.

8. Conclusion

The revised arrangement for funding places at New Woodlands is part of the process of ensuring spend from the HNB is distributed fairly and with transparency. The Transition Plan in place to bring New Woodlands in line with special schools in the borough this is now progressing and provides support and challenge to the school to ensure that the right children are in the appropriate provision and that there is a clear action plan to ensure that New Woodlands is able to offer high quality provision in line with the agreed specialism.

Claudia Smith

Consultant Senior Education Advisor
(Alternative Provision, Inclusion & SEND)

Agenda Item 8

Schools Forum

16 March 2017

Item 8

Schools Forum			
REPORT TITLE	Financial Update and Budget Monitoring Report		
KEY DECISION	Yes	Item No.	8
CLASS	Part 1	Date	16 March 2017

1. Purpose of the Report

This report updates members on the latest key financial developments effecting schools

2 Recommendation

The Forum agree

- a. To endorse the funding tasks groups response to the fair funding consultation as shown in Appendix A
- b. To note the lobbying undertaken by CASE and London Councils
- c. To note the position on the budget monitoring
- d. To agree the allocation of funding to special schools that
 - i. Adds back the £0.5m reduction
 - ii. Provides transitional protection to the schools that are losing funding
- e. To agree to the allocation of £40k to support an additional resource for the Fair Access, Elective Home Education and Alternative Provision Service
- f. To note the position on
 - The overspend now forecast on the High Needs Block of £0.25m
 - Schools Financial Value Standard
 - Oracle Enterprise Resource Planning (ERP)
 - Early Closing of the Accounts
- g. To agree that the surplus on the catering trading account be distributed to schools on the same basis as the charges.

3. National Funding Formula

- 3.1 The task group met on 7 March and has drawn up a consultation response which is shown in Appendix A to this report. The Forum are asked to endorse this. The main point that the task group wish to make is that they feel no school should lose out through the funding changes.
- 3.2 The Mayor wrote to all schools on the 1 March.
- 3.3 Lobbying

3.3.1 CASE

Members of CASE (Campaign for State Education) attended the last schools forum as observers and have been holding days of action across Lewisham against the funding cuts. This has been mainly through promoting awareness of the national Fair Funding for All Schools Campaign by leafleting from information stalls in both Catford and Lewisham Town Centre.

3.3.2 London Councils

London Council have garnered media coverage in BBC London, the Guardian and the Evening Standard.. They have issued a joint release with Core Cities which was covered in the Evening Standard and in major regional titles including the Yorkshire Post, Northern Echo, and East Anglian Times. They continue to work with Core Cities to mitigate against the 'them and us' narrative about London and the rest of the country. The Evening Standard also created an interactive map of impact by borough which can be found here:

<http://www.standard.co.uk/news/education/london-schools-will-lose-up-to-500-per-pupil-as-funding-is-rebalanced-a3467331.html>.

They have been working with the London APPG and organised a briefing for MPs on 7th February which was addressed by a Headteacher, the London Chair of the Federation of Small Business and Cllr David Simmons on behalf of London Councils. We have sent a number of briefings to London MPs on the issue and will continue to do so. The London All-Party Parliamentary Groups (APPG) has issued a press release and will be organising more activity on school funding both before and after the close of the consultation on 22 March.

London Councils are encouraging borough Leaders to write to every head teacher in their borough. This is to ensure that head teachers are

aware the borough recognises the pressure they are facing and how the borough is working to address these concerns, either through the boroughs own lobbying efforts, or with local MPs or businesses etc., or through London Councils.

London Councils have also been approached to brief a number of parents groups. They will do this with a view to ensuring that parents groups are fully and accurately informed of the potential impacts of the new National Funding Formula and how to respond to the consultation. London Councils are happy for boroughs to recommend parents groups that the boroughs think should be briefed.

The Mayor of London has issued a supportive press release .

London Councils publications and statements are available here:

<http://www.londoncouncils.gov.uk/schoolsfunding>

4. School Budget Monitoring Returns

4.1 The December budget monitoring returns were due by the end of January. The latest indications are that the schools carry forward at the end of the year will be £6.1m

4.2 This £6.1m compares with a forecast of £7.2m at December 2015. Indications from the returns in previous years would suggest there is an element of under forecasting of the year end balances. The final 2015/16 figure was £12.1m.

4.3 To date we have now received the following returns

	Received	Outstanding
Primary	59	4
Secondary	8	3
Special	3	2
Nursery School	2	0
PRU	1	0

4.4 The timetable for reminders to schools is as follows

Email from School Finance Team to school bursar	1 week after deadline
Email from School Finance Team to Headteacher	3 weeks after deadline
Letter will be sent from the Head of School Improvement	5 weeks after deadline

Note – there are two monitoring returns required each year, one at the end of September and the other at the end of December. A school is allowed one month to submit its return.

4.5 The are 6 schools who are operating an in-year deficit of greater than £100k in the current year (2016/17) who have carry forwards forecast to be less than these levels. The schools will be written to initially to clarify their plans. If this is not satisfactory they will be visited.

4.6 Loans to schools

Nine schools with deficits have been draft loan agreement to agree before the year end

5. Schools Financial Value Standards (SFVS)

At the time of writing this report there were 28 who have not returned their SFVS. Returns outstanding on the 31 March 2017 will need to be reported to the Department of Education.

Members are urged to reminded their representative groups that with the tightening of the financial position in schools that it is important to undertake the standards and that governors ensure proper processes are being undertaken in schools and to ensure that there is also proper governance.

6. High Needs Block

The growing numbers of pupils with high needs now indicate that there will be overspend at the year of £250k. There is no carry forward to offset this year and this will be need to be rolled forward and met form next year's forecast. The high needs sub group will be asked to look at the position over the coming months when the exact overspend at the year-end is known.

7 Special Schools Budgets

The settlement was particularly difficult as while there was extra growth for children with high needs of £0.5, the latest forecasts is the actual cost to Lewisham of the growth in pupil numbers with high needs is £1.7m.

The commissioned places for special schools next year are shown below. Each of these places will be funded at £10,000.

School	Places	Funding (£)
Brent Knoll	154	1,540,000
Drumbeat	158	1,580,000
Greenvale	117	1,170,000

Watergate	108.8	1,088,000
TOTAL	537.8	5,378,000

In partnership with special schools, a review of the way in which special pupils are banded was undertaken as it was believed the existing method is unfit for purpose. The principle on which this was operated was that it would be cost neutral but accepting there would be changes between schools.

Clarification was sought from the DFE on whether a disapplication of the Minimum Funding Guarantee (MFG) was required. The MFG limits a loss in a schools budget to 1.5%. The regulations allow for funding changes outside of the minimum funding guarantee based on needs and pupil numbers. The DFE have given formal approval to the disapplication.

In terms of notification of special school budgets the normal process is to confirm the place led funding before the end March as is required under the statutory guidance

Special school funding operates on the basis that top up funding will be given to schools for the actual pupils within the school on a day by day basis. Normally we do not provide a forecast of this. However as there is a new funding system the special schools have been provided with an estimate of the funding they are likely to receive.

The banding rates we will use are those prior to the reduction of the £0.5m that the schools forum agreed on 17 January as after discussions with the DFE this did not fit within the MFG criteria entirely although a partially reduction could be made. The rates are as follows.

	£
Band E	6,200
Band F	15,200
Band G	27,900

It is proposed that the shortfall in funding will be met from the extra growth in the settlement that was detailed in the budget report to the Forum on the 17 January 2017

The figures below are a forecast of the individual special schools budget for the year. The numbers, particularly in September starters, provide an estimate of the pupils we think will join the school. Their bandings are assumed to follow the profile of bandings of the children in the school already.

Top-Up Funding 1st April 2017 to 31st August 2017

School	Band E	Band F	Band G	Funding £
Brent Knoll	27	70	50	853,000
Drumbeat	20	102	36	869,000
Greenvale	21	32	62	762,000
Watergate	0	22	76	798,000
TOTAL	70	221	231	3,282,000

Top-Up Funding 1st September 2017 to 31st March 2017

School	Band E	Band F	Band G	September Starters	Funding £
Brent Knoll	27	74	49	4	1,844,000
Drumbeat	16	96	36	2	1,753,000
Greenvale	16	31	67	4	1,705,000
Watergate	0	19	67	8	1,593,000
TOTAL	63	212	226	21	6,895,000

For those schools that are losing, the Forum are asked to agree transitional protection to ease the financial management of the changes. This will be based on comparing the change in funding from the current year with the above figures and provide support of 42% of the change. This is based on providing support for the first 5 months of the year. The funding for the transitional protection is proposed to come from the reserve set aside for the start of the post 19 provision.

The following table summarises the figures

School	Place Funding (£)	Top-Up Funding April to August (£)	Top-Up Funding Sept to March (£)	Transitional Funding (£)	Forecast of Likely Funding During The Year (£)
Brent Knoll	1,540,000	853,000	1,844,000	0	4,237,000
Drumbeat	1,580,000	869,000	1,753,000	200,000	4,402,000
Greenvale	1,170,000	762,000	1,705,000	0	3,637,000
Watergate	1,088,000	798,000	1,593,000	0	3,479,000
TOTAL	5,378,000	3,282,000	6,895,000	200,000	15,755,000

8. Closing the accounts

The timetable for Local Authorities to closing their financial accounts has gradually been reducing. Several years ago it was in the September after the year end. This has moved forward and now the accounts needs to be closed by June, however this will be brought forward to May in 2017/18. For this year Lewisham are undertaking a “dry run” to see what issues this will create.

This “dry run” and the fall of the Easter Holidays will mean schools will need to supply their data and close their accounts on the 24 March 2017. Comprehensive notes detailing this have been sent out already to schools and training sessions were held for Schools Bursars on 7 March 2017.

9 Proposals to support an additional resource with the Fair Access, Elective Home Education and Alternative Provision Service

9.1 Year 11 In Year Admissions: For all year 11 in-year admissions during September to January (within an academic year) to be referred to Baseline for an advice and guidance session on the best choice of education / fair access. This would identify needs and aspirations, and enable young people to placed appropriately within Lewisham e.g. at school, Alternative Provision, the Lewisham Southwark College or Abbey Manor College. All other Year 11 in year admissions can follow the same route but the concentration is the start of the academic year until census date. English as a first language learners would still follow the normal admissions route to Lewisham Southwark College.

9.2 In Year Admissions: To support the investigation of any in year applications that trigger key questions about the suitability of a child or young person to be educated within a mainstream education e.g. poor attendance, behaviour, risk of permanent exclusion or permanent exclusions in other boroughs. This means taking into account key admissions legislation and statutory guidance so we can support children and young people to be successful in their education.

Schools Forum is asked to consider the additional resource for both issues and agree £40,000 to support the two needs.

10 Oracle Enterprise Resource Planning (ERP)

The Council is currently engaged in a procurement exercise to replace its payroll and human resources software. The current software is ResourceLink and this has been provided by NorthgateArinso Limited

for the last eight years, with the current contract due to come to an end in March 2018. It is important to note that for those schools that currently use the Council's payroll service, there will be no adverse impact with the implementation of a new solution. It will be an entirely seamless transition, resulting in continuous services and very much business as usual. In fact, with the greater enhancements we are expected to gain by moving to a new solution, there will be better opportunity for schools to engage with and use the payroll service more effectively. The Council intends to brief schools in more detail at the appropriate time during the solution implementation phase which is expected to start prior to the summer holidays. Should you have any queries in the meantime, then please contact Selwyn Thompson, LBL Head of Financial Services.

11 Traded Services Update

All service level agreements have been reviewed for 2017/18 to ensure that they are accurate, clear and provide schools with good value for money. Consultation with schools over the last year has helped the Council to understand school priorities, buying habits and service requirements. As a result of this, the services included have aimed to clarify their offer and made amendments based on feedback received. The Services for Schools booklet was published in the Headteachers' Weekly Bulletin on 9th February 2017 for headteachers, business managers and governors to browse service level agreements. The booklet will be sent out again on 15th March 2017 with a charging form for schools to commit to buying services.

Lewisham Council is offering two new SLAs which can be purchased from September 2017 to August 2018: Safeguarding and a School Resilience Package. Following consultation and analysis of purchasing habits, the following services will no longer be offered as part of this SLA booklet:

- Anti-Fraud and Corruption: support will be offered on an ad-hoc basis in consultation with the CYP directorate.
- Corporate Health and Safety: statutory services will continue at the Council's expense.
- Insurance and Risk Management: this is no longer managed through the SLA booklet but mandatory services will continue for council-owned buildings and council employees.
- Internal Audit: the service will continue to be charged for as appropriate but is not included within the SLA booklet as schools are currently on a rolling 3 year audit programme.

The Schools Mail Service will be completely reviewed in 2017–18.

12. 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:

	Growth Fund	Contingency	Non-Sickness Supply
	£	£	£

Brought Forward	-247,083	-726,549	158,993
Distributed To Schools	0	0	0
Offset	0	0	0
	-247,083	-726,549	158,993

De-Delegation Income	0	-649,998	-799,993
Budget	-1,092,000	0	0
Spend To Date	1,160,929	0	857,593
Projected Spend	0	1,310,355	350,155
	68,929	660,357	407,755

Cumulative Total	-178,154	-66,192	566,748
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12.1 Growth Fund

The budget for the year is £1,092k, but with the £247k brought forward surplus, the amount of funds available rises to £1,339k. Allocations have been journalled to maintained schools and payments have been made to academies.

A surplus of £205k is forecast.

12.2 Contingency

The de-delegation charges for the year have provided £650k, but with the £727k brought forward surplus, the amount of funds available rises to £1,377k.

No charges have been actioned against the Contingency yet in 2016/17, but as discussed at the June 2016 Forum these funds will be called upon should a school with a deficit become an academy.

At present a surplus of £66k is forecast, but these funds may be called upon to cover the projected overspend in the non-sickness supply scheme.

12.3 Non-Sickness Supply Fund

The de-delegation charges for the year have provided £800k, but with the £159k brought forward deficit, the amount of funds available falls to £641.

The summer and autumn term claims have been paid. These totalled £858k.

Forecasting future claims is difficult and previous years show little consistency, but as the autumn term claims for this year are similar to the same period last year, a spring term estimate similar to the actual spring term claims from last year has been added.

This leads to the forecast of a deficit of £567k. The de-delegation charges for 2017/18 have been increased to cover the increased level of claims and the deficit that will be carried forward.

13. The school meals corporate catering account managed by Chartwells is currently showing a surplus, which will allow some catering charge to be returned to schools. The sum involved has yet to be finalised as the contract year concluded at the end of the spring term. However our forecasts suggests there will be a residual balance and in accordance with previous decisions by Schools Forum, we are seeking approval to return this to schools once the account has closed. The final payment under the contract for 2014/15 has now been made. Negotiations are currently being conducted to determine the adjustment to the contract payments to take into account the LLW increase (hourly rate from £9.15 - £9.75 April 2017) and future inflation.

In setting the charge for schools it was agreed that the Council would endeavour to keep this the same throughout the life of the five year contract. It was accepted at the time that due to the vagaries of future financial forecast this may change.

While at the moment the negotiations are ongoing it is apparent that there will be a sum of money in the account that can be returned to schools. It would seem sensible that this is returned to schools as soon

as possible and in line with the charges under the current contract. The charge is based on pupil numbers and free meal numbers. The Forum are recommended to agree this in principal and thus allow distribution as soon as agreement is reached with Chartwells.

The likely sums involved for schools of various sizes are as follows

Small School	10,000
Medium School	20,000
Large School	25,000

Dave Richards

Group Finance Manager – Children and Young People

Contact on 0208 314 9442 or by e-mail at
Dave.Richards@Lewisham.gov.uk

Schools national funding formula – draft response

1. In designing our national funding formula, we have taken careful steps to balance the principles of fairness and stability. Do you think we have struck the right balance?

With the 3% cap on overall funding reductions, the proposed national funding formula now strikes a better balance between fairness and stability. However, the level of overall funding indicates that delivery of a fair and stable system will be undermined. Fairness nor stability cannot be achieved under a funding model that redistributes funding. Under the formula change no school should lose funding especially with the cost pressures anticipated over the next three years.

Whilst the mechanics and financial impact of the new funding system are set out in detail, the government does not provide evidence that thousands of schools have the ability to maintain or improve performance levels with reduced cash budgets. Schools should be protected from the impact of the funding formula, and should be protected against the impact of wider cost pressures, particularly those that are a direct result of government policy such as the apprenticeship levy.

2. Do you support our proposal to set the primary to secondary ratio in line with the current national average of 1:1.29, which means that pupils in the secondary phase are funded overall 29% higher than pupils in the primary phase?

The decision to use a national average approach represents current practice and no evidence has been provided to suggest this is correct.

3. Do you support our proposal to maximise pupil-led funding, so that more funding is allocated to factors that relate directly to pupils and their characteristics?

Yes. It is equally important that schools with exceptional characteristics - such as split sites and PFI contracts continue to be recognised fairly in the new funding system.

4. Within the total pupil-led funding, do you support our proposal to increase the proportion allocated to the additional needs factors (deprivation, low prior attainment and English as an additional language)?

Yes, but under the proposed funding system, there would be an inconsistency between deprivation funding within the formula and deprivation funding channelled through the pupil premium outside of the formula. Whilst deprivation factors based on free school meals (FSM) within the national funding formula will be area cost adjusted, the pupil premium grant based on the same criteria is currently distributed through a flat per pupil rate. The pupil premium should be protected and adjusted for area costs.

5. Do you agree with the proposed weightings for each of the additional needs factors?

Updates to IDACI data will need to be managed carefully. Local flexibility was exercised by the Schools Forum, which enabled the recent turbulence in the IDACI to be managed. Once a 'hard' formula has been introduced this will not be possible

The high weighting proposed for prior attainment is likely to take funding away from relatively high-performing areas such as London.

6. Do you have any suggestions about potential indicators and data sources we could use to allocate mobility funding in 2019-20 and beyond?

London Councils commissioned the Education Datalab to produce detailed research into the impact of pupil mobility on London's schools. The report provides evidence of the higher levels of mobility in the capital and provides estimates of the per pupil costs of different types of mobility based on interviews with schools. Practical proposals for the design of a national funding formula factor, based on the national pupil database, are also outlined the research would seem a better way forward.

7. Do you agree with the proposed lump sum amount of £110,000 for all schools?

The lump sum should be varied for primary and secondary schools. Small secondary schools are facing real challenges and the lump sum should reflect their larger management structure in comparison to primary.

8. Do you agree with the proposed amounts for sparsity funding of up to £25,000 for primary schools and up to £65,000 for secondary, middle and all-through schools?

n/a

9. Do you agree that lagged pupil growth data would provide an effective basis for the growth factor in the longer term?

No. Unfunded pupil growth is a significant challenge and we do not agree that the proposal to use lagged pupil growth data is an effective solution. The formula should not allow for pupils who are not funded. The school capacity survey (SCAP) data could be helpful for distributing suitable funding.

10. Do you agree with the principle of a funding floor that would protect schools from large overall reductions as a result of this formula? This would be in addition to the minimum funding guarantee.

Yes. We support the principle of a floor funded but this should be at current funding levels provided for by extra funding within the system.

11. Do you support our proposal to set the floor at minus 3%, which will mean that no school will lose more than 3% of their current per-pupil funding level as a result of this formula?

Extra funding should be invested to avoid any school losing out from these proposals.

12. Do you agree that for new or growing schools the funding floor should be applied to the per-pupil funding they would have received if they were at full capacity?

No, as funding would be over-allocated to these schools.

13. Do you support our proposal to continue the minimum funding guarantee at minus 1.5% per pupil? This will mean that schools are protected against reductions of more than 1.5% per pupil per year.

Yes, the MFG should continue as under the current system.

14. Are there further considerations we should be taking into account about the proposed schools national funding formula?

The system of funding new schools from 2018/19 will mean all schools are on the funding floor. The "soft" funding formula will mean we will have to allocate the same funding as provided, meaning there will no flexibility with the system for Lewisham

15. Are there further considerations we should be taking into account about the impact of the proposed schools national funding formula?

Many of the cost pressures facing schools, as identified by the National Audit Office, are the direct result of government policy, such as changes to national insurance and pension contributions. Any action the government can take to ease these cost pressures would make the introduction of a fair funding formula less challenging.

16. Do you agree that we should allocate 10% of funding through a deprivation factor in the central school services block?

Yes. Local authorities in more deprived areas are likely to incur higher costs.

17. Do you support our proposal to limit reductions on local authorities' central school services block funding to 2.5% per pupil in 2018-19 and in 2019-20?

Yes.

18. Are there further considerations we should be taking into account about the proposed central school services block formula?

Following the effective end of the education services grant and the decision to roll retained duties funding into the schools block, a new system of funding for central functions begins in

2017/18. One year later, a second system of funding central functions will be introduced through the new fourth block of DSG. The introduction of two new systems in two years appears to lead to an uneven transition path for local authorities.

DRAFT

High needs national funding formula – draft response

1. **In designing our national funding formula, we have taken careful steps to balance the principles of fairness and stability. Do you think we have struck the right balance?**

Pressures on high needs budgets are considerable and it is difficult to see how without extra investment, fairness and stability can be achieved. Managing this will not be helped by stopping the cross funding of the spending blocks.

2. **We are proposing a formula comprising a number of formula factors with different values and weightings. Do you agree with the following proposals?**

- **Historic spend factor – to allocate to each local authority a sum equal to 50% of its planned spending baseline**
- **Basic entitlement – to allocate to each local authority £4,000 per pupil**

Yes, we support the inclusion of a historic spend factor and basic entitlement factor.

3. **We propose to use the following weightings for each of the formula factors listed below, adding up to 100%. Do you agree? • Population – 50% • Free school meals eligibility – 10% • IDACI – 10% • Key stage 2 low attainment – 7.5% • Key stage 4 low attainment – 7.5% • Children in bad health – 7.5% • Disability living allowance – 7.5%**

The weightings appear to be reasonable, but it is difficult to comment without a stronger evidence base.

4. **Do you agree with the principle of protecting local authorities from reductions in funding as a result of this formula? This is referred to as a funding floor in this document.**

Yes.

5. **Do you support our proposal to set the funding floor such that no local authority will see a reduction in funding, compared to their spending baseline?**

Yes, the current baselines are not a true reflection of actual spend and further work needs to be done on this to find the true position.

6. **Do you agree with our proposals to allow limited flexibility between schools and high needs budgets in 2018-19?**

Under the NFF Lewisham schools will be on the cash floor so there will no possibility of flexibility.

In general though we do not agree with proposals to restrict the transfer of funding between blocks.

- 7. Do you have any suggestions about the level of flexibility we should allow between schools and high needs budgets in 2019-20 and beyond?**

This does not seem an option with all Lewisham schools on the cash floor

- 8. Are there further considerations we should be taking into account about the proposed high needs national funding formula?**

There needs to be a better link between cost pressures, funding and the supply of new high needs places.

Agenda Item 9

Schools Forum
16 March 2017
Item 9

Schools Forum			
REPORT TITLE	Annual Review of the Scheme of Delegation and Finance Manual and Terms of Reference of the Forum		
KEY DECISION	Yes	Item No.	9
CLASS	Part 1	Date	16 March 2017

1. Purpose of the Report

To consider revisions to the Finance Manual to provide details of the support provided when a schools goes into deficit. The paper looks at updating the Terms of Reference of the Forum.

2. Recommendation

- The Forum agree that the budget and budget monitoring support and challenge shown in Appendix A should form part of the Finance Manual.
- The Forum agree the revised terms of reference in Appendix C

3. Background

Prior to the start of each financial year the Forum undertakes an annual review of the scheme of delegation and finance manual. This is to incorporate any legislatives changes required and any changes that the Forum consider desirable to make. The Terms of Reference of the Forum has not been updated for a number of years and it seems appropriate that they are revised at this time.

4. Budget and Budget Monitoring process

- 4.1 Over the past 18 month we have seen an increasing number of schools enter into deficits. It is expected that the number of schools going into deficit will increase next year as well. With the likely implementation of the national funding formula reducing funding further, coupled with no funding for cost pressures it is expected that this trend of schools in deficit will continue.
- 4.2 Appendix A details for the first time the whole support that is provided to schools in deficit. While it has been working practice this document allows schools to see the support they will receive.

5. Terms of Reference

The terms of reference is now out dated and has not been reviewed. Attached at Appendix B is the current terms of reference, while Appendix C shows an updated version.

6. Scheme of Delegation

There are no changes to the scheme of delegation proposed.

Dave Richards

Group Finance Manager – Children and Young People

Contact on 0208 314 9442 or by e-mail at
Dave.Richards@Lewisham.gov.uk

CHALLENGE AND SUPPORT PROCESS FOR SCHOOLS WITH A DEFICIT BUDGET

CHALLENGE AND SUPPORT PROCESS FOR SCHOOLS WITH A DEFICIT BUDGET

Introduction

The Lewisham Scheme of Delegation prevents schools from planning for a deficit when preparing their budget plans, however it recognises that from time to time circumstances in which, despite best efforts a school ends the financial year in deficit. To support the Authority's monitoring role the Scheme requires:

- Schools to return a governor approved annual budget to the Local Authority (LA) by the 1st May each year.
- Schools unable to set a balanced budget to notify the LA and apply for a loan.

Schools should only apply for a loan in circumstances where they cannot set a balanced budget without seriously impacting on the educational provision at the school. The Local Authority has no power to write off the loan of any school.

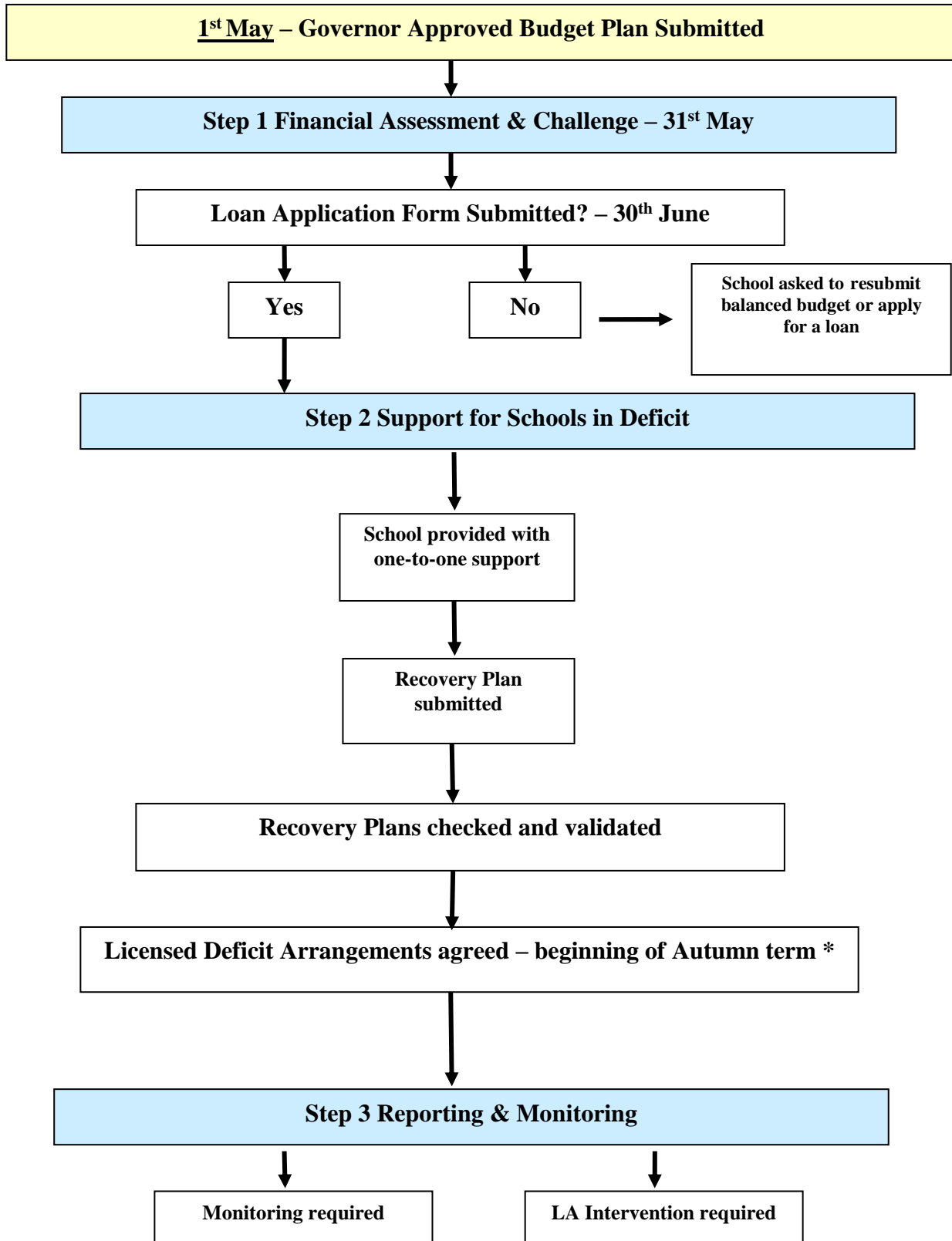
A loan plan in excess of £0.5m requires approval of the Mayor otherwise the Executive Director of Children and Young People can approve the loan.

The process is used by the Authority to provide schools with an appropriate level of challenge and support to help them set a balanced budget or if this is not achievable to prepare a recovery plan that sets out the action the school will take to achieve a sustainable balanced financial position over an agreed period of time. The loan arrangement within the Lewisham Scheme of delegation states:

- In cases where a school finishes the financial year in deficit the situation should be corrected by the end of the following financial year.
- A deficit proposed by the governing body may be agreed usually over a three year period but can be extended to 5 year or beyond in exceptional circumstances.
- In both cases the schools must complete the Application for a Loan.

Deficit Schools – Challenge and Support Process

The process for challenging and supporting schools with deficit balances is defined in the diagram below:



*Unless it needs to be approved by the Mayor when it will be the end of November.

Challenge and Support Process

Each of the steps in the diagram is explained below.

Step 1: Financial Assessment and Challenge

If a school submits a 'Budget Plan' that shows a deficit position they have to submit an application for a loan together with a simple recovery plan which indicates how they intend to bring the schools financial position back into balance. This may be through a combination of income generation and/or a reduction in expenditure.

Schools that submit a Budget Plan showing a deficit position without applying for a loan will be asked to re-submit a balanced budget or apply for a loan.

Step 2: Support for Schools in Deficit

Where schools are unable to complete a recovery plan, the Local Authority will determine the appropriate type of challenge or support required by the school to enable it to complete a plan based on -

- Significance of the deficit both in year and cumulative
- Length of time the school has been in deficit
- Level of financial competency based on audit checks
- Benchmarking data
- Contextual data

Financial advice, information and training will be available to support schools in recovering from a deficit financial position by experienced officers through a Service Level Agreement.

Following the submission of a Budget Plan and recovery plan a number of validation checks will be completed by the Local Authority to ensure that the plans are reasonable. This will be done by: -

- Comparing the current year's income and expenditure budgets with previous years' trends to identify any significant differences.
- Checking that the correct balances have been brought forward into the current year and that all funding delegated by the LA has been taken in to account.
- Actions included in the recovery plan are realistic and that by implementing them the required level of savings can be achieved.
- Any areas that are unclear or simply not achievable will be queried with the school and clarification sought.

Where the plans are deemed to be suitable the loan application will be passed to the Executive Director of Children and Young People for approval. If the plan is in excess of £0.5m the loan application will need to be approved by the Mayor. The report will be prepared by Local Authority officers working closely with the school.

Written confirmation will be sent to the school by the beginning of the autumn term once the loan has been approved (or by the beginning of the Spring Term if mayoral approval is required).

Schools with a applying for a loan must produce a recovery plan that demonstrates they are able to achieve a balanced budget over the agreed loan period.

The plan can be a simple statement showing:

- What actions will be taken
- When the actions will happen
- How much will be saved by taking the action

An example of a simple recovery plan is shown below.

School Budget Deficit Recovery Plan

Estimated savings to be achieved over two years £ 345,000

Year 1

Budget Deficit (£ 185,000)

Deficit Recovery Plan

- | | | |
|--|-----------------|-------------------|
| • End 2 temporary teaching contracts 31/08 | £ 20,000 | |
| • Non replacement of teacher leaving 31/12 | £ 11,000 | |
| • Embargo on expenditure (computer hardware) | £ 10,000 | |
| • Private Sector Sponsorship | <u>£ 60,000</u> | £ 101,000 |
| | | <u>(£ 84,000)</u> |

Year 2

Deficit Budget B/F (£ 84,000)

Planned Increases in Expenditure

- | | | |
|--|--|-------------------|
| • Sickness cover costs | | (£ 44,000) |
| • Necessary expenditure on resources | | (£180,000) |
| • Reduction in Yr 2 Budget (decreasing AWPU) | | (£ 37,000) |
| | | <u>(£345,000)</u> |

Deficit Recovery Plan

- | | | |
|---|-----------------|---------------|
| • Reduce teaching establishment (3 FTE) 01/04 | £ 80,000 | |
| • Reduce 2 members of SMT with post Replacement 01/04 | £ 40,000 | |
| • End temporary contracts 5.8 teachers 31/0 | £140,000 | |
| • Reduce expenditure on building improvements | £ 40,000 | |
| • Full Yr saving 2 temporary contracts from Yr1 | £ 34,000 | |
| • Reduce non teaching staff by 30 Hrs | <u>£ 15,000</u> | £349,000 |
| | | <u>£5,000</u> |

Step 4: Reporting and Review

Monitoring the School Recovery Plan

Schools with loan agreements will be monitored on a monthly basis (only months during term time). Schools are required to return a forecast year end outturn position each month by the end of the following month; this will be checked for accuracy and reasonableness and compared with the previous financial forecasts and the school's recovery plan.

Schools will be contacted if there are any queries about the financial information or projected financial position. Where a school's financial position worsens they will be referred to the Group Finance Manager for CYP and the Head of Standards and Inclusion. Schools refusing to engage in the process or who are persistently in breach of the Scheme of Delegation will be required to attend a financial review meeting with the LA to discuss their financial position.

Local Authority Intervention

Local Authority intervention will apply where:

- The school is persistently in breach of the Scheme for Financing Schools
- The school will not set a balanced budget
- The school will not engage in the loan application process
- The deficit is worsening and no action is being taken by the school
- There is evidence of financial mismanagement by the school

Intervention is proposed to escalate at three levels. It is envisaged that deficit schools will engage with the LA well before the need for intervention as these arrangements are the last resort, for the protection of public monies and to protect the overall resource for all schools in Lewisham. The levels of intervention are:

1. Financial Challenge Meeting held by the Executive Director of Children and Young People with the Headteacher and Chair of Governors
2. Financial Warning Notice
3. Withdrawal of delegation or IEB set up

Level 1 - Financial Challenge Meeting

Schools that do not return a balanced budget or apply for a loan will be required to attend a Financial Review Meeting with the LA. A similar requirement will apply to schools with a worsening deficit and also for those schools who persistently breach the Scheme for Financing Schools.

The review meeting will include Senior Officers from the Children And Young People's Directorate, the Headteacher and Chair of Governors or representative Governor.

The meeting will:

- Review the financial position of the school
- Seek an explanation from the school about the action being taken to safeguard the school's financial position
- Assess what support and challenge the school may require
- Agree an action plan

Level 2 – Financial Warning Notice

A school that continues to refuse to take the necessary action will be required to attend a Notice of Concern meeting with Senior LA Officers. They will be given a formal notice of the action the LA recommends they should take to bring the budget back in to balance. The school will be given a month to respond.

Level 3 – Withdrawal of Delegation or IEB set up

Where a school still refuses to take the action identified by the LA the ultimate sanction will be to suspend delegation following a meeting with the Director of Children’s Services. Under suspension the authority would take control of the budget and take the necessary action before returning control to the Governing Body. During the suspension school staff would be responsible to the authority for the day-to-day financial administration in the school. The more likely action would be to set up an Interim Executive Board to replace the Governors in order for them to run the school.

ESCALATION PROCESS

The escalation process for a school that fails to submit a budget plan or budget monitoring return is as follows-

Action	Time
Email from the School Finance Team to Headteacher	1 week after deadline
Letter will be sent from the Head of Education, Standards and Inclusion	2 weeks after deadline
Letter will be sent from the Executive Director of CYP to the Headteacher and Chair of Governors and Head Teacher	3 weeks after deadline
If necessary the Chair of Governors and Headteacher will be called in to meet the Executive Director of CYP	4 weeks after deadline

Schools Forum - Terms of Reference – CURRENT VERSION

Terms of Reference

Introduction

The Schools Forum meets 6 times per year. Its representation consists of :

- nursery, primary, secondary and special school heads
- primary, secondary and special school governors
- parent governors
- A Southwark Diocesan Board of Education representative
- An Archdiocese of Southwark Schools' Commission representative
- A 14-19 Consortium representative
- An Early Years representative
- An Academies representative (*shortly to be appointed*)

The Forum is responsible for considering

any proposed changes to the schools funding formulas factors or criteria that were adopted in their formula made in accordance with regulations made under section 47 of the School Standards and Framework Act 1998
the financial effect of any such change

Statutory Duties

The forum must be consulted and agree if the proposed percentage increase to the centrally managed share of the Designated Schools Grant (DSG) is greater than the overall DSG settlement.

Other responsibilities

monitor and track schools with deficits
to advise and support schools to gain the expertise with which to manage their finances effectively.

The Schools Forum is also consulted on:

- arrangements to be made for the education of pupils with special educational needs
- arrangements for early years education, the use of pupil referral units, the education of children otherwise than at school
- insurance of school premises and professional indemnities
- prospective revisions to the relevant authority's scheme of financing of schools
- administration arrangements for the allocation of central government grants paid to schools
- arrangements for free school meals
- proposed contract for supplies or services paid out of the schools budget, e.g. catering

Schools Forum - Terms of Reference – PROPOSED VERSION

Background

Every Local Authority is required by the School Standards and Framework Act 1998 as amended to have a Schools Forum for its area. The constitution, conduct of meetings, functions and role of the Forum are determined by the Schools Forums (England) Regulations 2015 and the School and Early Years Finance (England) Regulations 2017.

Introduction

The Schools Forum meets 5 times per year. Its representation consists of :

- Nursery, primary, secondary and special school heads
- Primary, secondary and special school governors
- A Southwark Diocesan Board of Education representative
- An Archdiocese of Southwark Schools' Commission representative
- A 14-19 Consortium representative
- An Early Years representative
- An Academies representative

The Forum is responsible for considering

- Any proposed changes to the schools' funding formula factors or criteria in accordance with regulations made under section 47 of the School Standards and Framework Act 1998
- The financial effect of any such change.

Statutory Duties

The forum must be consulted and agree if the proposed percentage increase to the centrally managed share of the Designated Schools Grant (DSG) is greater than the overall DSG settlement increase.

Other responsibilities

Monitor and track schools with deficits to advise and support schools to gain the expertise with which to manage their finances effectively.

The Schools Forum is also consulted on:

- Arrangements to be made for the education of pupils with special educational needs
- Arrangement for early years education, the use of pupil referral units, the education of children otherwise than at school
- Insurance of school premises and professional indemnities

- Prospective revisions to the relevant authority's scheme of financing of schools
- Arrangements for free school meals
- Administration arrangements for the allocation of central government grants
- Proposed contract for supplies or services paid out of the schools budget, e.g. catering
- De-delegation for mainstream schools for:
 - Contingencies
 - Administration of free school meals
 - Insurance
 - Licences/subscriptions
 - Staff costs – supply cover
 - Support for minority ethnic
 - Pupils/underachieving groups
 - Behaviour support services
 - Library and museum services
 - School Improvement
- Services previously funded by the ESG general duties rate.

Terms of Office

School and non-school members may serve for a period of three years. Subsequent re-election of existing members will be allowed. A member from the same representative group will replace members leaving early.

If a member has not attended a meeting in the last 6 months then a reminder will be sent to the member, if the member does not attend for 9 months the nominating body will be notified, in order for them to consider whether they want to appoint an alternative member.

Where a member leaves the organisation they are representing they will cease to be a member.

If a school changes its status (e.g. becomes an Academy) the term of office of any member representing schools of the original status will come to an end at the end of the academic year.

The Secretary of State has powers to remove from the Forum any non-school member representing an organisation which she/he has determined, should not hold membership of the Forum.

Declaration of interest

In order to show transparency, maintain confidence in and accountability of its members, School Forum members are expected to declare relevant personal, financial or business interest, which they or any person closely associated with them, has in any matter to be considered by the Forum. Each agenda will remind members of their obligations to declare interests on items proposed on it.

In considering the declaration of interest a member of the Forum should apply the following test: would a member of the public, knowing the facts of the situation, reasonably think that the member might be influenced by the interest.

There is not deemed to be a declarable interest where the Forum considers the allocation of resources between schools but there is, if their institute is the only one affected. A member should voluntarily declare their interest in an item and will be asked to retire from the room.

Quorum

A meeting is only quorate if **40%** of the current membership (excluding vacancies) is present. If a meeting is inquorate, it can proceed but it cannot legally take decisions (for example, election of a chair, or a decision relating to funding conferred by the funding regulations). An inquorate meeting can respond to authority consultation, and give views to the authority. It would normally be good practice for the authority to take account of such 'unofficial' views, but it is not legally obliged to do so.

Substitutes

If a member is unable to attend a meeting it is permissible to send a substitute. The substitute for a Headteacher or Governor needs to be a fellow Headteacher or Governor.

Observers

Observers may attend all forum meetings but may not vote. Observers may not speak unless invited to do so by the chair.

Working Groups

The Forum may set up working groups of members to discuss specific issues, and to produce draft advice and decisions for the forum itself to consider and approve.

Public access to meetings; publication of papers

Meetings of the Forum will be held in public, in common with other Council committees.

All agendas, minutes and reports will be published promptly on the Forum's website, upon being issued to members of the Forum.

Information on the Schools Forum and its deliberations will be included periodically in newsletters to Headteachers and Governors.

Schools Forum
16 March 2017
Item 10

LEWISHAM SCHOOLS FORUM		
Proposed Dates For Future Meetings And The Work Plan For The Coming Year		
Yes	Item No.	10
Part 1	Date	16 March 2017

1. Purpose Of The Report

To provide the dates and the work plan for future meetings of the Forum over the coming year.

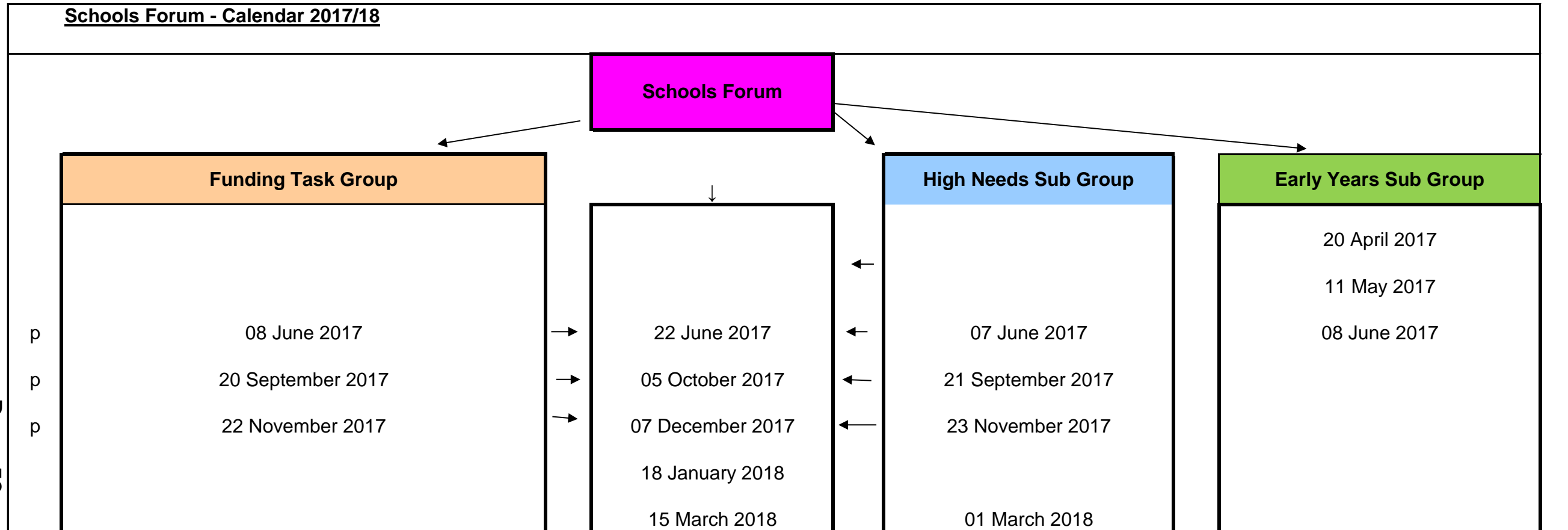
2. Background

- 2.1. The work of the Forum is considerable, complex and involved. It is important that over the coming year it is planned in a logical and structured way. Attached is a suggested programme of work.
- 2.2. The fact that an item is not on the plan does not preclude it from being added after this meeting if Forum so wishes.
- 2.3. It is expected that in the latter months of the plan a considerable number of items will be added to the work programme.
- 2.4. The Forum now has three sub-groups, the High Needs sub group, the Funding Task Group and the Early Years Sub Group, that will look at the changes to the national funding formula and how it is implemented. The dates for the coming year have been set so that the sub-groups meet just before the full Forum meetings. This will allow reports and minutes to be reported back to the full Forum in a timely fashion.

Dave Richards

Group Finance Manager – Children and Young People

Contact on 0208 314 9442 or by e-mail at Dave.Richards@Lewisham.gov.uk



P = Provisional - Subject to the receiving the outcome of the consultation

Proposed Date	Agenda Items	Purpose
22 June 2017	School Balances Traded Service Report Budget Monitoring Report Absence Report By School ESG Review Early years sub group report Schools Forum constitution and membership	To report to Forum on the year-end balances for schools Update of the current buy back levels To inform members of spending patterns and address issues To update members on the latest school position Value for money assessment of Education Services Grant Progress on the implementation of the 30 hours of childcare To review the current constitution
05 October 2017	Election of Chair and Vice-Chair Budget Monitoring Report Statutory maintenance reports Annual Internal Report Catering contract annual report Health and Safety Report 30 hours childcare Commissioning of high needs places and the authority's arrangements for top-up funding Council Savings And Service Level Agreement Charges for 2018/19	To inform members of spending patterns and address issues To update members on the latest school position To receive a report about the outcomes of school audits Annual review and monitoring of catering contract To receive a report about the outcomes of school audits To consider the implementation New requirement for the Schools Forum to be consulted on the proposals To update members on the latest position
07 December 2017	Budget Monitoring Report High Needs Sub Group Report Early Years sub group Fundng task group report Budget Setting	To inform members of spending patterns and address issues To consider the sub group proposals for next year To consider the impact of the 30 hours childcare and next years budget To consider the task group proposals for next year To consider and develop next years budget proposals
18 January 2018	Budget Setting	To consider and develop next years budget proposals
15 March 2018	Budget Monitoring Report Budget and capital update Scheme of delegation Finance Manual S52 Benchmarking Election of members Work Plan	To inform members of spending patterns and address issues To consider details of the programme Annual update of the document Annual update of the document To inform members of spending patterns to provide a more informed debate on the budget A number of members three year term of duty expires. To agree the draft work plan for the coming year