

SCHOOLS FUNDING FORUM AGENDA

8.30 - 11.00 am	20 September 2018	CEME, Room 234
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Members: 18 Quorum: 40% of total membership excluding vacancies

MEMBERSHIP:

Representative Groups

Head Teachers (12):	Emma Allen, Special Maintained Margy Bushell, Primary Maintained Kirsten Cooper, Primary Maintained Georgina Delmonte, Primary Maintained David Denchfield, Primary Academies Nigel Emes, Primary Academies Ray Lawrence, AP Academy Simon London, Secondary Academies Gary Pocock, Special Academies Jan Taylor, Primary Maintained Keith Williams, Secondary Academies
Governors (7):	Bernard Gilley, Primary Maintained John McKernan, Secondary Academies
Non-School Representatives (4):	Maria Thompson, Post 16 Joanna Wilkinson, Early Years/PVI Sector
Trade Unions (3):	John Delaney, NUT Peter Liddle, UNISON John McGill, NASUWT

For information about the meeting please contact:
David Allen david.allen@haverling.gov.uk 01708 433851

If you are unable to attend please contact your named substitute or ask David Allen to do so on your behalf.

AGENDA ITEMS

1. WELCOME TO NEW MEMBERS, APOLOGIES FOR ABSENCE AND ANNOUNCEMENT OF SUBSTITUTE MEMBERS OR OBSERVERS

To welcome Peter Liddle as the representative of UNISON on the Schools Funding Forum following the resignation of John Giles, Georgina Delmonte who has replaced Malcolm Drakes as head teacher representative from cluster F and Ray Lawrence as representative of the AP Academy.

2. SCHOOL FORUM MEMBERSHIP

To receive a verbal report.

3. ELECTION OF CHAIR AND VICE CHAIR

To elect a Chair and Vice Chair until the first meeting of the autumn term 2019.

4. TO AGREE THE MINUTES OF THE MEETING HELD ON 10TH MAY 2018 (Pages 1 - 4)

5. MATTERS ARISING

6. HIGH NEEDS FUNDING FORECAST 2018-19 (Pages 5 - 7)

7. SCHOOL AND HIGH NEEDS FUNDING 2019-20 (Pages 8 - 16)

8. CENTRAL SERVICES DSG CENTRALLY RETAINED FUNDING 2019-20 (Pages 17 - 21)

9. DE-DELEGATION OF FUNDING FROM MAINTAINED SCHOOLS 2019-20 (Pages 22 - 35)

10. SCHOOL FINANCING SCHEME (Pages 36 - 39)

11. TEACHERS PAY AWARD (Page 40)

12. BEHAVIOUR AND INCLUSION (Pages 41 - 46)

13. **ACADEMY CONVERSIONS AND SPONSORS**

To note that the following schools have converted to academy status since the last meeting:

Gaynes	Loxford Schools Trust	1 st July
Sanders	Success For All Educational Trust	1 st September
Hacton Primary	Empower Learning Academy Trust	1 st September
Dame Tipping Primary	LIFE Education Trust	1 st September

14. **NEXT MEETINGS**

Future meetings have been arranged as follows:

8th November 2018

13th December 2018

17th January 2019

7th March 2019

13th June 2019

All meetings to start at 8.30 a.m. at CEME

15. **ANY OTHER BUSINESS**

**MINUTES OF A MEETING OF THE
SCHOOLS FUNDING FORUM
CEME
10 May 2018 (8.30 - 10.11 am)**

Present:

Representative Groups

Head Teachers:	Emma Allen, Special Margy Bushell, Primary Kirsten Cooper, Primary David Denchfield, Primary Malcolm Drakes, Primary Nigel Emes, Primary Vicky Fackler, Special Academy Jan Taylor, Primary Keith Williams, Secondary Academy Bernard Gilley, Primary
Governors:	
Non-School Representatives:	Maria Thompson, Post 16
Trade Unions:	John Giles, UNISON John McGill, NASUWT

53 APOLOGIES FOR ABSENCE AND ANNOUNCEMENT OF SUBSTITUTE MEMBERS OR OBSERVERS

Apologies for absence were received from Simon London (Secondary Academy) and Gary Pocock (Special Academy).

Vicky Fackler was in attendance as a substitute for Gary Pocock.

54 TO AGREE THE MINUTES OF THE MEETING HELD ON 22ND FEBRUARY 2018

The minutes of the meeting of the Forum held on the 22 February 2018 were agreed as a correct record and signed by the Chairman.

55 MATTERS ARISING

There were no matters arising from the minutes from the previous meeting which were not covered by items elsewhere on the agenda.

56 OLIVE AP ACADEMY - FUNDING ARRANGEMENTS

An update on the funding arrangements for the Olive AP Academy was provided, during which it was explained that the local authority had met with representatives of the Olive Academies Trust to discuss options. Other local authorities had also been contacted to compare levels of funding and it was found that Havering's funding allocation was low relative to other local authorities although this was in the context of Havering's DSG High Needs settlement being the lowest per capita in London.

The proposal put to, and accepted by the Board of the Olive Academies Trust was as follows:

1. An additional allocation of £180,000 to be reflected in an increased top up rate.
2. An 'up-front' assumption of income from the AWPU deduction from excluding schools of £70,000, also to be reflected in an increased top up rate.
3. The ability to offer intervention places to secondary schools at a charge, with the costs to schools supported from the central Social inclusion Fund.

The Board however expressed concerns about meeting the shortfall which would require further discussion with the local authority. Concern regarding the charging of vulnerable schools was raised and it was explained that the proposals would need to be discussed with secondary headteachers, to ensure that they had an input into the shaping of the Olive Academy.

The allocation of the Social Inclusion Fund was questioned, upon which it was explained that consideration would need to be given to protecting the fund to ensure a fair division of funds between primary and secondary schools and to applying weighting to vulnerable schools.

The Schools Funding Forum noted the funding arrangements for Olive AP Academy – Havering, as detailed in the report.

57 DSG OUTTURN 2017-18

Members received a report which set out the year end position on expenditure from the Dedicated Schools Grant in 2017-18.

The carry forward balance from centrally retained Dedicated Schools Grant from 2017-18 into 2018-19 was £948,887. The balance of DFE grant for 2, 3 and 4 year olds and 30 hour take up, staff vacancies and transfer of central costs contributed to the £193,000 Early Years Block underspend. It was proposed that £93,000 of the underspend be used to support the Local Authority with the purchase of new software to improve the collection of census data from providers. The recommendation to hold the underspend as an unallocated sum until the adjustment to the grant allocation by the DFE was agreed by members.

The High Needs Block had been overspent by £296,000 partly due to the high cost of placements at residential and independent provision. It was proposed, and agreed, that part of the overall underspend be allocated to the High Needs Block to balance the overspend. A report on High Needs would be provided at the next meeting.

The Schools Block had underspent by £1.031m mainly due to an underspend of the Falling Rolls Fund by £247,020, Pupil Growth by £562,041 and School Partnerships by £144,013. Any school funded for pupil growth in the current financial year where the PAN had subsequently been reduced would have the funding withdrawn.

The Schools Funding Forum noted the areas of underspend and overspend from the 2017-18 DSG Schools Block; and agreed the following:

- i) To balance the overspend of £296,034 in the High Needs Block from 2017-18 to reduce the pressure in that area in 2018-19.
- ii) To carry forward £50,000 from the £144,013 School Partnership budget as a contingency for the Havering Academy of School Leadership.
- iii) To retain the remaining balance of £684,727 as an unallocated contingency to support continuing high needs pressures in 2018-19 and to provide sufficient funding to implement the national funding formula in 2019-20.

The budgets that were de-delegated from maintained primary and secondary schools were balanced at year end with the exception of an underspend of £21,058 in the budget for trade union facility time due to vacancies for trade union representatives. It was proposed that £21,058 be carried forward to the 2018-19 budget for trade union facility time with consideration given by the trade union representatives on how it should be best used in the provision of support to schools.

During discussion, members expressed concern that there had been no accountability or transparency of expenditure of trade union facility time. It was explained that the Conditions of Service Working Group would be open to recording trade union time and a template had been drafted for comment by the trade unions. Members discussed the impact that the increase of academies would have on the budget and the implications of not having access to local trade union representation. Advice outlining service purchasing had been sent to all schools, including details of what services would be unavailable if trade union membership were not bought into. It was agreed that the funding be used to support the transition to the reduced amount of £2.50 per pupil.

58 S251 BUDGET STATEMENT 2018-19

The Forum received, and noted, the Section 251 budget statement for the 2018-19 financial year detailing planned expenditure on all aspects of

Children's Services. The total net schools budget (before Academy recoupment) was £214,437,770.

59 ACADEMY CONVERSIONS AND SPONSORS

Members noted that Harrow Lodge Primary School had converted to academy status with the Partnership Learning Trust on the 1 March 2018.

60 NEXT MEETINGS

Future meetings had been arranged as follows:

7th June 2018

5th July 2018

61 ANY OTHER BUSINESS

- 1) The Healthy Pupils Capital Grant funded by the sugar tax had been put to the ESP representatives and it was agreed that this would be allocated to schools by formula rather than organise a central bidding process.
- 2) Any parent in receipt of Universal Credit would be eligible for free school meals from June 2018 if their household income was less than £7,400 per annum (excluding benefits). All pupils currently eligible for free school meals would retain their eligibility irrespective of the changes until 2022. This would mean that schools expenditure on free school meals would increase, however Government had provided reassurance that schools would be compensated.

Schools Funding Forum 20th September 2018 ITEM 6

Subject Heading:	High Needs Funding 2018-19
Report Author:	David Allen – Strategic Finance Manager
Eligibility to vote:	All members

SUMMARY

This report summarises the forecast expenditure for 2018-19 from Havering's allocation from the DSG (Dedicated Schools Grant) High Needs Block.

RECOMMENDATIONS

That the Schools Funding Forum notes the forecast position on High Needs expenditure for financial year 2018-19.

REPORT DETAIL

Funding in support of high need provision is funded to local authorities through the High Needs Block of the Dedicated Schools Budget (DSG). This allocation is made for all provision for Havering pupils but an amount is then recouped for provision through special academies, non maintained special schools, 6th form colleges and AP academies.

Havering's funding allocation and expenditure in the last four years and the forecast for 2018-19 is shown in the table below.

	2014-15 £m	2015-16 £m	2016-17 £m	2017-18 £m	2018-19 £m
Initial allocation	18.874	18.981	19.485	22.698	23.273
Recoupment	(0.716)	(1.075)	(2.581)	(3.581)	(3.429)
DSG transfers	0	0	1,400	0	1.079
Available funding	18.158	17.906	18.304	19.117	20.923
Spend	(17.910)	(18.728)	(18.225)	(19.413)	(22.923)
Spend vs Budget	0.248	(0.822)	0.079	(0.296)	(2.000)

In 2016-17 Havering increased its High Needs funding by £1.4m from transfers from other funding blocks which was built into the base allocation and in 2018-19 a one off £800k was allocated from the DSG underspend from previous years. A further £279k has been allocated to High Needs in 2018-19 from the DSG underspend carried forward from 2017-18.

The forecast expenditure as at September 2018 is for an overspend of £2m against a high needs block DSG allocation of £23.2m. Appendix A provides a further breakdown.

Havering's allocation of high needs funding is under pressure each year not only from increasing numbers and complexity of need but also from the number of high cost placements in out of borough provision. In addition, some areas within the high needs budget are under-resourced, across both mainstream and special schools.

The insufficiency of funding to local authorities through the DSG High Needs Block is a national issue. An increasing number of local authorities are reporting year end overspends of their High Needs funding. 22 county councils and the majority of London boroughs have projected overspends in 2018-19. The attempts of some local authorities to take remedial action have been the subject of judicial review.

The Local Authority is producing a report for wider circulation to set out how it allocates its High Needs funding and to demonstrate how increasing demand will put at risk the ability to contain expenditure within future years' allocations of funding.

Schools Funding Forum 20th September 2018

Available funding after recoupment

	2017-18		
	£000		
	19,117		
	Estimated Expenditure	No of Pupils/Places supported	
	£000	Pre 16	Post 16
Havering Special Schools	5,422	276	41
Expenditure on therapies etc	43		
Out of Borough Maintained Special Schools	368	24	
Revised In-Borough Primary Top-up	2,106	343	
Out of Borough Mainstream Primary	134	25	
Expenditure on alternative tuition + therapies	53		
In year EHC Plans	-		
Total Primary High Needs funding	2,293	368	
Revised In-Borough Secondary Top-up	1,124	270	
Out of Borough Mainstream Secondary	95	15	
Expenditure on alternative tuition + therapies	255		
In year EHC Plans			
Total Secondary High Needs funding	1,475	285	
Schools with high nos. of pupils with SEN	213		
Additionally Resourced Provision	1,493	87	
In-Borough Post-16 Top-up	430		100
In-Borough Post-19 Top-up			
Out of Borough Post-16	795		94
Expenditure on Post-16 Tuition	23		
Total Post-16	1,248		194
Non-Maintained & Independent Special Schools Pre-16	2,202	37	
Non-Maintained & Independent Special Schools Post-16	972		16
Early Years Inclusion Fund	21		
Alternative Provision	2,303		
Central support teams	1,363		
Total	19,414	1,077	268
High Needs allocation	19,117		
Forecast overspend	297		

2018-19		
£000		
20,923		
Estimated Expenditure	No of Pupils/Places supported	
£000	Pre 16	Post 16
5,965	287	50
116		
246	19	
2,833	352	
178	20	
144		
186	35	
3,340	407	
1,390	352	
124	20	
349		
50	9	
1,913	381	
309		
1,673	99	
579		99
119		10
831		92
22		
1,550		201
2,846	48	
869		12
100		
2,462		
1,533		
22,923	1,241	280
20,923		
2,000		

Agenda Item 7



Havering
LONDON BOROUGH

Schools Funding Forum 20th September 2018 ITEM 7

Subject Heading:

**Schools and High Needs Funding
Formula 2019-20**

Report Author:

**David Allen – Strategic Finance
Manager**

Eligibility to vote:

All school members

SUMMARY

This report summarises the DFE's decisions on arrangements for funding schools, high needs and central services in 2019-20, the second year of the national funding formula for schools, high needs and central services and considers the likely impact on Havering and any action that may need to be taken.

RECOMMENDATIONS

That the Schools Funding Forum notes the changes in the national funding formula for schools and high needs for 2019-20

REPORT DETAIL

In July 2018 the DFE issued a number of documents setting out the funding arrangements for financial year 2019-20 for schools, high needs and central services under a national funding formula.

2019-20 is the second year of what was intended to be a two year transitional period before all schools in the country are funded according to the same formula with no opportunity for local adjustment. The DFE has decided that the transitional period will be extended by a third year so the "hard" formula will not be implemented until at least 2021-22.

Illustrative local authority level allocations for 2019 to 2020 have been published for the schools, central school services, and high needs blocks which are shown

below. These are based on October 2017 census data and will be updated in December for October 2018 pupil numbers.

The DFE's full operation guide can be found at:

<https://www.gov.uk/government/publications/pre-16-schools-funding-guidance-for-2019-to-2020>

Schools Block

	Actual primary unit of funding (PUF)	Actual secondary unit of funding (SUF)	Primary pupil numbers (2018-19 DSG schools block)*	Secondary pupil numbers (2018-19 DSG schools block)*	Actual 2019-20 funding through the premises and mobility factors	Illustrative growth funding (at 2018-19 actuals)*	Provisional NFF 2019-20 schools block funding
2019-20	4,054	5,495	21,969	21,968	2,161,496	3,359,988	173,643,254
2018-19	4,005	5,474	21,969	21,969	5,468,154	0	172,208,864
Difference	1.24%	0.38%	0	-1	-3,306,658	3,359,988	1,434,390
					53,330	combined increase	

The indicative funding allocations to LAs are based on the application of the primary and secondary units of funding through the NFF to October 2017 census data. Funding has been added separately for premises (NNDR) and mobility factors and for pupil growth (including a falling rolls allocation) which is based on LAs' planned spending in 2018-19. The pupil growth funding will be revised following the introduction of a new formula which is likely to disadvantage Havering. This is dealt with separately below.

The rates (NNDR) allocation to LAs is through the premises factors as above but is based on the 2017-18 estimates. Since then, not only has the rates multiplier been increases but there have been several revaluations for expanded schools for which backdated charges of approximately £230k have been received during 2018-19 without the budget to fund them. The LA is in discussion with the ESFA on how this and increased costs in future years are to be funded.

The distribution of funding to schools and academies must be through a formula agreed in consultation with LAs' Schools Forums that must meet the requirements of the DFE in terms of its use of factors and minimum amounts allocated through pupil factors. The Schools Funding Forum is reminded that in 2018-19 there was agreement for Havering to fund schools according to the national funding formula including a minimum funding guarantee of +0.5% and a gains cap of 3%.

The primary and secondary units of funding (PUFs) and (SUFs) used in the indicative Schools Block allocation will not change for the final allocation in December and will be applied to the October 2018 pupil numbers for primary and secondary schools.

In line with the approach and commitments set out last year, three key aspects of the schools national funding formula are being updated in 2019 to 2020.

- (i). Within the schools block, the government will provide for at least a 1% per pupil increase for each school in 2019 to 2020 through the national funding formula compared to their 2017 to 2018 baseline.
- (ii). The minimum per pupil funding levels have increased to £3,500 for all primary schools and £4,800 for all secondary schools.
- (iii). The gains cap has increased so that schools can attract gains of up to 6.09% against their 2017 to 2018 baselines.

Some policy changes have been made to the 2019 to 2020 national funding formula. These are:

- Pupil Growth funding will be allocated to local authorities on a formulaic basis (see below).
- The primary low prior attainment factor value has reduced to £1,022 (from £1,050) to balance the increase in the cohort.
- IDACI band C has been slightly increased so that it provides a higher funding rate than band D, with increases of £30 per eligible primary pupil and £45 per eligible secondary pupil;

A number of smaller changes have been made to the arrangements for calculating local formulas to support local authorities to mirror the national funding formula. These include:

- A new funding floor factor to enable local authorities to mirror the increase of 1% per pupil against 2017 to 2018 baselines.
- Enabling local authorities to mirror the sparsity taper used in the national funding formula (not applicable to Havering).
- There is no longer a need to set a weighting for primary low prior attainment because all results have been assessed under the new framework.
- The authority pro forma tool (APT) cap now has the functionality to vary the capping and scaling to apply the alternative gains cap used in the national funding formula, meaning that local authorities can allow schools to gain the greater of either 3% of their 2018 to 2019 baseline, or 20% of their remaining gains.

The minimum funding guarantee (MFG) for schools will continue, and local authorities continue to have the flexibility to set a local MFG between minus 1.5% and plus 0.5% per pupil.

The schools block will again be ring-fenced in 2019 to 2020. Local authorities are able to transfer up to 0.5% of their schools block funding out with the agreement of their schools forum. Transfers of more than 0.5% may be allowed in circumstances where the Secretary of State has previously allowed a transfer between blocks and where this is again agreed by the schools forum.

The NNF funding values are attached at Appendix A.

School Block Growth funding

A significant change for Havering in the 2019-20 funding arrangements will be the introduction of formula to allocate pupil growth funding to LAs.

Funding will be allocated to local authorities based on the actual growth in pupil numbers they experienced the previous year. This will ensure that over time local authorities are funded on the basis of the actual growth they experience (albeit on a lagged basis), rather than historic spending decisions.

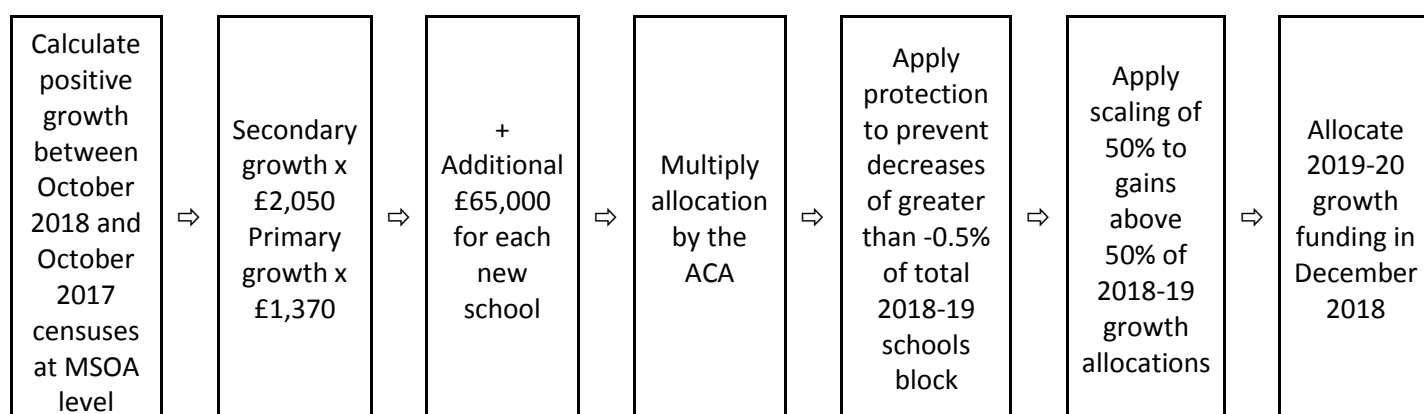
The measurement of growth will be by counting the increase in pupil numbers in each in the local authority between the two most recent October censuses. Only positive increases in pupil numbers will be included, so a local authority with positive growth in in one area, and negative growth in another, will not be denied growth funding. The count will be at middle layer super output area (MSOA) level as the DFE considers these to be small enough geographical areas to detect 'pockets' of growth within local authorities.

For the measured growth in each sector the growth factor will allocate:

- £1,370 for each primary 'growth' pupil,
- £2,050 for each secondary 'growth' pupil, and
- £65,000 for each brand new school that opened in the previous year (that is, any school not appearing on the October 2017 census but appearing on the October 2018 census)

Protection will be applied so that no local authority's growth allocation will fall by more than -0.5% of their overall 2018-19 schools block funding.

In order to make this affordable, growth gains above a threshold will be scaled back. Local authorities will gain in full up to a maximum increase of 50% compared to their 2018-19 growth allocation, with gains above this scaled by a factor of 50%.



Havering's 2018-19 allocation for pupil growth is £2.7m plus £0.5m for falling rolls. Under the new formulaic approach initial calculations are that this will reduce to approximately £1.8m.

This new formula and the lagged arrangements will be a significant issue for Havering given the growing pupil population and the funding that Havering is currently able to allocate to schools with permanent expansions and bulge classes and also guarantees of funding where classes do not fill.

The DFE does not expect local authorities to use their formula to determine how much growth funding to allocate to individual schools. Local authorities should continue to make decisions about growth funding locally as they do now. It is recognised that local authorities' spending on growth will not necessarily match precisely the sum allocated to them for growth, and they will continue to have the ability to 'top slice' their overall schools block funding to fund pupil number growth.

The LA is exploring the option of estimating growth in the main schools' funding formula which would mean that growing schools would receive AWPUP and other per pupil funding for the additional pupils within the main formula allocation. This would, however, mean that the Schools Block would be funding more pupils than the number for which it is funded leading to reductions in formula factor values.

High Needs Block

Funding allocations issued to LAs are based on the application of the high needs national funding formula as below:

- £4,000 per pupil in special schools adjusted for ACA
- 50% based on historical spend
- 25% on population
- 25% on a range of deprivation factors
- Additional funding for LAs providing hospital education
- Adjustments for imports and exports

Havering's indicative high needs block funding

	Actual high needs NFF allocations, excluding basic entitlement factor, import/export adjustments and hospital education spending	Actual ACA-weighted basic entitlement factor unit rate	Number of eligible pupils in special schools/academies/independent settings (based on January 2017 AP and October 2017 school census)*	Actual import/export adjustment unit rate	Net number of imported pupils/students (based on January 2018 school census and February R06 2017/18 ILR)*	2017-18 Hospital education spending with 1.0% uplift plus 2018-19 adjustment s with 0.5% uplift**	Provisional NFF 2019-20 high needs block funding
2019-20	23,570,348	4,348	343	6,000	-86	78,932	24,624,757
2018-19	22,298,238	4,348	343	6,000	-86	0	23,273,715
Difference	1,272,110	0	0	0	0	78,932	1,351,042
							5.8%

The above allocation will be adjusted in December 2018 for the number of pupils in Havering's special schools as at the October census and also for imports/exports. There will be a further adjustment for imports/exports in the summer term 2019 of £6,000 per pupil.

For 2019 to 2020, the funding formula includes a funding floor that provides a minimum 1.0% increase to the amount of its DSG that it planned to spend on high needs in 2017 to 2018 on a per head of population basis. This will apply to every local authority that is not receiving more than that level of increase under the rest of the formula.

The gains cap will also continue to apply at 6.09% per pupil above the 2017-18 baseline.

Further operational guidance on High Needs funding will be issued by the DFE at a later date.

In 2019-20 there is again a one-off opportunity to transfer 0.5% of an LA's Schools Block funding to the High Needs Block which requires the approval of LAs' Schools Forum. Transfers are also permitted from the Early Years block but are subject to the compliance with the 95% pass through rate and from the Central Schools Services block which is fully committed.

In 2018-19 it was agreed to transfer £800,000 into the High Needs block from a previous year DSG underspend and consideration of transfers may need to be given again to address forecast overspends. Elsewhere in this agenda is an item reporting on the pressures on the Havering's high needs block.

Post-16 high needs funding

The DFE is considering the changes to allow local authorities more flexibility to develop bespoke arrangements with schools and colleges for funding students with special needs.

Currently all post-16 providers making special provision for students with high needs receive an amount of funding based on the post-16 national formula, and £6,000 per high needs place funded from local authorities' high needs allocation.

Some local authorities have asked if they can have more flexibility to allocate the £6,000 per place funding, either more in line with the way their pre-16 schools formula allocates funding for the additional support required by pupils with SEN, or in accordance with an alternative funding approach.

Further details of this change will be provided by the DFE at a later date but any revised funding mechanism must be agreed locally with schools, colleges and other institutions.

Consideration is also being given by the DFE to the simplification of the post-16 high needs funding arrangements for some institutions by introducing a flat rate for the element of funding normally calculated through the post-16 national funding formula. This could help to reduce the data collection requirements. The DFE will consult further with the relevant institutions and their representative organisations, in the autumn.

Central School Services Block (CSSB)

Prior to 2017-18, funding for LAs' central services was allocated within the Schools Block or through a separate Education Services Grant (ESG). Funding for areas such as School Admissions, Pupil Growth and Falling Rolls was then top sliced from the Schools Block and held centrally. ESG ceased from September 2017 with an allocation of £15 per pupil for "retained duties" transferred to the DSG, now as part of the CSSB.

Since 2018-19 pupil growth and falling rolls funding has been allocated through the Schools Block as an additional sum to the formula-generated allocation along with Pupil Mobility and Rates funding. The rest of the funding for central services is allocated at a rate per pupil with funding for historic commitments funded as an additional amount.

Havering's 'historic commitments' are support for school partnerships (£200,000) and for a 15 year old energy contract for three secondary schools (£87,490) which expires in July 2019.

	Actual CSSB unit of funding for ongoing functions	Pupil numbers (2018-19 Schools block)*	Actual funding for historic commitments	Provisional NFF 2019-20 CSSB funding
2019-20	35.23	36,356	287,490	1,568,294
2018-19	35.16	36,357	287,490	1,565,802
Difference	0.20%	-1	0	2,492

From 2002 to 2021, the DFE expects to start to reduce the historic commitments element of the CSSB. Schools Forum approval is required for historic commitments.

Schools Forum approval is also required at item 8 for some of the remaining CSSB. In Havering this is as follows:

Budget line	2018-19 budget £	2019-20 estimate £
National copyright licences negotiated centrally (Approval not required)	171,443	174,475
School Admissions (Approval required)	496,290	496,290
Servicing of Schools Forum (Approval required)	43,250	43,250
Balance for central services (Approval required)	567,329	566,789
Total	1,278,312	1,280,804
Historic commitments	287,490	287,490
Total	1,565,802	1,568,294

DSG Balances

An increasing number of local authorities are now incurring a deficit on their overall DSG account, largely because of overspends on the high needs block.

With effect from 2019 to 2020 the DFE intends to tighten up the rules under which local authorities have to explain to them their plans for bringing the DSG account back into balance.

It is intended to require a report from any local authority that has a DSG deficit of more than 1% as at 31 March 2019. This report will need to be discussed with the schools forum and set out the authority's plans for bringing the DSG account back into balance.

The DFE will consult local authority representatives during the autumn of 2018 about the detailed implementation of these new rules.

Comparison of NFF formula factor values

	2017-18 LBH rates	2018-19		Diff	2019-20		Difference
		national rates	ACA @ 1.08204		national rates	ACA @ 1.08204	
AWPU (Primary)	3,074.06	2,746.99	2,972.35	-101.71	2,746.99	2,972.35	
AWPU (KS3)	4,542.03	3,862.65	4,179.54	-362.49	3,862.65	4,179.54	
AWPU (KS4)	4,740.43	4,385.81	4,745.62	5.19	4,385.81	4,745.62	
Ever6 FSM (Primary)	0.00	440.00	476.10	476.10	440.00	476.10	
Ever6 FSM (Secondary)	0.00	440.00	476.10	476.10	440.00	476.10	
FSM (Primary)	1,252.32	540.00	584.30	-668.02	980.00	1,060.40	
FSM (Secondary)	2,260.66	785.00	849.40	-1,411.26	1,225.00	1,325.50	
IDACI Band 1 / F (Primary)	0.00	200.00	216.41	216.41	200.00	216.41	
IDACI Band 2 / E (Primary)	125.00	240.00	259.69	134.69	240.00	259.69	
IDACI Band 3 / D (Primary)	275.00	360.00	389.53	114.53	360.00	389.53	
IDACI Band 4 / C (Primary)	615.00	360.00	389.53	-225.47	390.00	422.00	32.46
IDACI Band 5 / B (Primary)	630.00	420.00	454.46	-175.54	420.00	454.46	
IDACI Band 6 / A (Primary)	645.00	575.00	622.17	-22.83	575.00	622.17	
IDACI Band 1 / F (Secondary)	0.00	290.00	313.79	313.79	290.00	313.79	
IDACI Band 2 / E (Secondary)	125.00	390.00	422.00	297.00	390.00	422.00	
IDACI Band 3 / D (Secondary)	275.00	515.00	557.25	282.25	515.00	557.25	
IDACI Band 4 / C (Secondary)	615.00	515.00	557.25	-57.75	560.00	605.94	48.69
IDACI Band 5 / B (Secondary)	630.00	600.00	649.22	19.22	600.00	649.22	
IDACI Band 6 / A (Secondary)	645.00	810.00	876.45	231.45	810.00	876.45	
LAC	1,000.00	0.00	0.00	-1,000.00	0.00	0.00	
Low Attainment (Primary)	489.22	1,050.00	1,136.14	646.92	1,022.00	1,105.84	-30.30
Low Attainment (Secondary)	802.89	1,550.00	1,677.16	874.27	1,550.00	1,677.16	
EAL (Primary)	232.67	515.00	557.25	324.58	515.00	557.25	
EAL (Secondary)	734.73	1,385.00	1,498.63	763.90	1,385.00	1,498.63	
Lump Sum (Primary)	150,000.00	110,000.00	119,024.40	-30,975.60	110,000.00	119,024.40	
Lump Sum (Secondary)	175,000.00	110,000.00	119,024.40	-55,975.60	110,000.00	119,024.40	

Schools Funding Forum 20th September 2018 ITEM 8

Subject Heading:

Centrally retained DSG

Report Author:

**David Allen – Strategic Finance
Manager**

Eligibility to vote:

All members

SUMMARY

This item is to seek the approval of the Schools Funding Forum for the central retention of funding from the DSG to continue the support and services as agreed in previous financial years.

RECOMMENDATIONS

To agree the central retention of the budgets in 2019-2020 as detailed below.

REPORT DETAIL

The revised funding arrangements for 2018-19 introduced a fourth funding block for central services (the central schools services block). This block is to fund local authorities for statutory duties they hold for both maintained schools and academies.

The central schools services block (CSSB) brings together:

- Funding previously allocated through the retained duties of element of the Education Services Grant (ESG)
- Funding for ongoing central functions such as admissions, previously top-sliced from the schools block

- Residual funding from historical commitments, previously top-sliced from the schools block.

The operational guidelines on 2019-20 revenue funding set out the areas and activities for which DSG funding may be retained centrally.

Those budget areas are listed below together with the funding requested for 2019-20 against the funding agreed by the Schools Funding Forum for 2018-19.

Services	Budget 2018-19	Budget 2019-20
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Schools forum approval is not required (although they should be consulted)

• High needs block provision	£19.1m	£
• Central licences negotiated by the Secretary of State	£171,443	£174,475 (estimate)

Schools forum approval is required on a line-by-line basis.

• Funding to enable all schools to meet the infant class size requirement	£50,000	£50,000
• Back-pay for equal pay claims		
• Remission of boarding fees at maintained schools and academies	£0	£0
• Places in independent schools for non-SEN pupils	£0	£0
• Admissions	£496,290	£496,290
• Servicing of Schools Forum	£43,250	£43,250
• Contribution to responsibilities that local authorities hold for all schools (see below)	£567,329	£566,789
• Contribution to responsibilities that local authorities hold for maintained schools (voted on by relevant maintained school members of the forum only)	See separate agenda item	See separate agenda item
• De-delegated services from the schools block (voted on by the relevant maintained school members of the forum only)		

Schools forum approval is required

• Central early years block provision after 95% pass through rate	£730,000	tbc
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• Movement out of the Schools Block	£0	£0
• Any deficit from the previous funding period that reduces the amount of the schools budget	£0	£0
• Any brought forward deficit on de-delegated services which is to be met from the overall schools budget	£0	£0

Schools forum approval is required on a line-by-line basis. The budget cannot exceed the value agreed in the previous funding period and no new commitments can be entered into.

• Capital expenditure funded from revenue decide prior to April 2013 (no new projects can be charged to the central schools budget)	£87,490	£87,490
• Contribution to combined budgets	£200,000	£200,000
• Existing termination of employment costs (i.e. no new redundancy costs can be charged to the central schools budget)	£0	£0
• Prudential borrowing costs	£0	£0

Schools forum approval is required on a line-by-line basis, including approval of the criteria for allocating funds to schools.

• Funding for significant pre-16 pupil growth, including new schools set up to meet basic need, whether maintained or academy	£2,700,000	tbc
• Funding for good or outstanding schools with falling rolls where growth in pupil numbers is expected within three years	£400,000	tbc

Schools Funding Forum approval is therefore sought to retain the funding centrally for the areas above including the funding for central services that was previously allocated directly through the Education Services Grant

Responsibilities held for all schools

Statutory and regulatory duties

Director of children's services and personal staff for director (Sch 2, 15a)
Planning for the education service as a whole (Sch 2, 15b)
Revenue budget preparation, preparation of information on income and expenditure relating to education, and external audit relating to education (Sch 2, 22)
Authorisation and monitoring of expenditure not met from schools' budget

shares (Sch 2, 15c)
Formulation and review of local authority schools funding formula (Sch 2, 15d)
Internal audit and other tasks related to the authority's chief finance officer's responsibilities under Section 151 of LGA 1972 except duties specifically related to maintained schools (Sch 2, 15e)
Consultation costs relating to non-staffing issues (Sch 2, 19)
Plans involving collaboration with other LA services or public or voluntary bodies (Sch 2, 15f)
Standing Advisory Committees for Religious Education (SACREs) (Sch 2, 17)
Provision of information to or at the request of the Crown other than relating specifically to maintained schools (Sch 2, 21)

Education welfare

Functions in relation to the exclusion of pupils from schools, excluding any provision of education to excluded pupils (Sch 2, 20)
School attendance (Sch 2, 16)
Responsibilities regarding the employment of children (Sch 2, 18)

Asset management

Management of the LA's capital programme including preparation and review of an asset management plan, and negotiation and management of private finance transactions (Sch 2, 14a)
General landlord duties for all buildings owned by the local authority, including those leased to academies (Sch 2, 14b)

Other ongoing duties

Licences negotiated centrally by the Secretary of State for all publicly funded schools (Sch 2, 8); this does not require schools forum approval
Admissions (Sch 2, 9)
Places in independent schools for non-SEN pupils (Sch 2, 10)
Remission of boarding fees at maintained schools and academies (Sch 2, 11)
Servicing of schools forums (Sch 2, 12)
Back-pay for equal pay claims (Sch 2, 13)
Writing to parents of year 9 pupils about schools with an atypical age of admission, such as UTCs and studio schools, within a reasonable travelling distance ¹ (Sch 2, 23)

¹Funding for this duty was previously delivered to local authorities via a s.31 grant. Additional funding will be added to the CSSB baseline for this from 2018 to 19.

Agenda Item 9



Havering
LONDON BOROUGH

Schools Funding Forum 20th September 2018 ITEM 9

Subject Heading:

De-delegation of funding for central services

Report Author:

David Allen – Strategic Finance Manager

Eligibility to vote:

LA maintained school representatives

SUMMARY

This item is to seek the approval of the Schools Funding Forum for the de-delegation of funding to maintain the provision of a range of central services permitted by the Schools Funding Regulations.

RECOMMENDATIONS

For LA maintained school representatives to consider:

1. The de-delegation of funding for the following services:
 - (i) Contingency to support schools in financial difficulty
 - (ii) Attendance & Behaviour
 - (iii) EAL
 - (iv) Free school meals eligibility
 - (v) Insurance
 - (vi) Maternity insurance
 - (vii) Trade Union Facility Time
2. The de-delegation of funding in support of LA central services for maintained schools.

REPORT DETAIL

Funding for de-delegated services must be allocated through the formula but can be passed back, or 'de-delegated', for maintained mainstream primary and secondary schools with schools forum approval. De-delegation is not an option for special schools, nursery schools and PRUs.

Where de-delegation has been agreed for maintained primary and secondary schools the local authority will offer the service on a buy-back basis to those schools and academies in their area which are not covered by the de-delegation.

Any decisions made to de-delegate in 2018 to 2019 related to that year only, so new decisions will be required for any service to be de-delegated in 2019 to 2020.

Schools forum members for primary maintained schools and secondary maintained schools must decide separately for each phase whether the service should be provided centrally and the decision will apply to all maintained mainstream schools in that phase. Funding for these services will then be removed from the formula before school budgets are issued. There may be different decisions for each phase.

The services which may be de-delegated are:

- contingencies (including schools in financial difficulties and deficits of closing schools)
- behaviour support services
- support to underperforming ethnic groups and bilingual learners
- free school meals eligibility
- insurance
- museum and library services
- licences/subscriptions
- staff costs supply cover (for example, long-term sickness, maternity, trade union and public duties)

For each service de-delegated, local authorities will need to make a clear statement of how the funding is being taken out of the formula (for example, primary insurance £20 per pupil, secondary behaviour support services £30 per FSM pupil). There should be a clear statement of how contingencies and other resources will be allocated.

De-delegation arrangements for schools converting to academy status during 2019-20 are as follows:

Conversion date

On or before 1 April 2019

2 April 2019 to 1 September 2019

2 September 2019 to 31 March 2020

De-delegation arrangements

No de-delegation

Local authority retains any de-delegated funding until 1 September 2019

Local authority retains any de-delegated funding until 31 March 2020

Where there has been agreement that a school is entitled to receive an allocation from a de-delegated contingency fund, that agreement should be honoured if the school converts to an academy at any point in the year. Where a school converts to an academy in the period 2nd April to 1st September 2019, local authorities will have an opportunity to present an evidence based case to the EFA to request a recoupment adjustment for the period 2nd September 2019 to 31st March 2020.

Any unspent de-delegated funding remaining at the year-end should be reported to schools forum. Funding may be carried forward to the following funding period as with any other centrally retained budget, and local authorities can choose to use it be used specifically for de-delegated services.

Services for which de-delegation is requested

1. Contingency for Schools in Financial Difficulty

Each year a small budget is held centrally which has been used to support schools who are in financial difficulty, sometimes through past decision making, unforeseen expenditure that cannot be contained within the school's budget or more commonly because of a reduction in pupil numbers. Several schools have been supported through this fund through criteria agreed by the Schools Funding Forum. For 2018-19 the de-delegation per pupil was £11.24 for maintained primary schools and the remaining two secondary schools. This generated a budget of £207,637.

Funding requested through de-delegation

	Primary
Formula factor	AWPU
Amount	£11.00
Total	£186,000

2. Attendance & Behaviour

An explanation of the service offered through de-delegation is attached at Appendix A.

Funding required through de-delegation from maintained primary schools

Formula factor	AWPU	FSM	IDACI C	IDACI B	IDACI A	Low attainment	
Amount	£2.00	£17.00	£15.00	£45	£300	£9.00	
Total	£33,758	£33,116	£18,276	£49,927	£1,500	£44,912	£181,489

2018-19	£2.74	£23.63	£47	£0	£490	£9.11	£196,610
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3. EAL Service

An explanation of the service offered through de-delegation is attached at Appendix B.

Funding required through de-delegation from maintained primary schools

Formula factor	EAL 3
Amount	£49.00
Total	£110,000

2018-19	£62.85
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4. Free School Meals Eligibility

This service checks the eligibility of children for free school meals and pupil premium grant by accessing a central government hub. Without this service schools would need to make their own arrangements to determine eligibility.

Funding required through de-delegation

	Primary
Formula factor	FSM
Amount	£9
Total	£17,613

5. Insurance

Insurance for maintained schools is part of the Borough's main insurance contract funded from de-delegation.

Formula factor	AWPU
Amount	£20.50
Total	£346,000

2018-19	£22.50
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6. Maternity Insurance

The LA administers an insurance scheme that meets the costs of teachers who are on maternity leave. The benefit of de-delegating the budget is that schools do not have to pay premiums or make claims.

If the funding is not de-delegated, schools would need to make individual choices to buy into the scheme which, if some schools decided not to, may make it unviable to run. It is not offered to academies.

Funding required through de-delegation

	Primary
Formula factor	AWPU
Amount	£26.00
Total	£439,000

7. Trade Union Facility Time

A working group of the Schools Funding Forum has previously considered issues raised in a DFE advice and guidance document and made comparisons of costs with other LAs. Decisions were made to reduce the amount of facility time and therefore the costs to schools and academies.

The pooled arrangements continue to benefit schools through the provision of support from locally based and accredited trade union officials.

The costs have reduced from an original £5.70 per pupil to £4.00 in 2015-16 and to £3.50 in 2016-17 and 2017-18. For 2018-19 the amount per pupil has been reduced to £2.50 for maintained schools and academies.

The total funding received from de-delegation and from academies will generate a budget that will determine the total facility time that is allocated to trade unions based on the proportion of their membership.

Funding required through de-delegation

	Primary
Formula factor	AWPU
Amount	£2.50
Total	£42,200

8. Central Education Services

At the September 2017 meeting of the Schools Funding Forum a report was presented on the withdrawal of the Education Services Grant (ESG) which was previously allocated to local authorities by the Government for the provision of statutory services in relation to schools. Academies had also been allocated ESG which has also ceased.

The report advised that from a 2016-17 allocation of £2.3m, £589k had been transferred to the DSG leaving no funding source to meet the remaining costs. After achieving savings of £590k this left a shortfall of £1.2m in financial year 2018-19.

In reducing the funding to local authorities, the DFE introduced a provision within the School Funding Regulations for local authorities to agree a contribution from LA maintained schools towards the cost of statutory services and specific tasks that are carried out for them that are not for academies. This principle reflects the charge that most Multi Academy Trusts place on their partner academies for central services.

This was agreed last year at £19.89 per pupil which produced a total contribution of £340k.

Having established the principle for 2018-19 a contribution from LA maintained schools is again requested for 2019-20. Havering's Education Service reviews its core costs on an ongoing basis to deliver services more efficiently to the benefit of schools and the wider education community and recognises the financial pressures that schools are under.

A request is made for a further contribution in 2019-20 of £17.90 per pupil which is a 10% reduction on 2018-19. Based on an average of £3,500 per schools this equates to a central services charge of 0.5%. This would produce a total contribution of £302k.

Responsibilities held for maintained schools only

Statutory and regulatory duties

Functions of LA related to best value and provision of advice to governing bodies in procuring goods and services (Sch 2, 57)
Budgeting and accounting functions relating to maintained schools (Sch 2, 74)
Authorisation and monitoring of expenditure in respect of schools which do not have delegated budgets, and related financial administration (Sch 2, 58)
Monitoring of compliance with requirements in relation to the scheme for financing schools and the provision of community facilities by governing bodies (Sch 2, 59)
Internal audit and other tasks related to the authority's chief finance officer's responsibilities under Section 151 of LGA 1972 for maintained schools (Sch 2, 60)

Functions made under Section 44 of the 2002 Act (Consistent Financial Reporting) (Sch 2, 61)

Investigations of employees or potential employees, with or without remuneration to work at or for schools under the direct management of the headteacher or governing body (Sch 2, 62)

Functions related to local government pensions and administration of teachers' pensions in relation to staff working at maintained schools under the direct management of the headteacher or governing body (Sch 2, 73)

Retrospective membership of pension schemes where it would not be appropriate to expect a school to meet the cost (Sch 2, 76)

HR duties, including: advice to schools on the management of staff, pay alterations, conditions of service and composition or organisation of staff (Sch 2, 64); determination of conditions of service for non-teaching staff (Sch 2, 65); appointment or dismissal of employee functions (Sch 2, 66)

Consultation costs relating to staffing (Sch 2, 67)

Compliance with duties under Health and Safety at Work Act (Sch 2, 68)

Provision of information to or at the request of the Crown relating to schools (Sch 2, 69)

School companies (Sch 2, 70)

Functions under the Equality Act 2010 (Sch 2, 71)

Establish and maintaining computer systems, including data storage (Sch 2, 72)

Appointment of governors and payment of governor expenses (Sch 2, 73)

Education welfare

Inspection of attendance registers (Sch 2, 79)

Asset management

General landlord duties for all maintained schools (Sch 2, 77a & b (section 542(2)) Education Act 1996; School Premises Regulations 2012) to ensure that school buildings have:

- appropriate facilities for pupils and staff (including medical and accommodation)
- the ability to sustain appropriate loads
- reasonable weather resistance
- safe escape routes
- appropriate acoustic levels
- lighting, heating and ventilation which meets the required standards
- adequate water supplies and drainage
- playing fields of the appropriate standards

General health and safety duty as an employer for employees and others who may be affected (Health and Safety at Work etc. Act 1974)

Management of the risk from asbestos in community school buildings (Control of Asbestos Regulations 2012)

Other ongoing duties

Clothing grants (Sch 2, 53)

Provision of tuition in music, or on other music-related activities (Sch 2, 54)

Visual, creative and performing arts (Sch 2, 55)

Outdoor education centres (but not centres mainly for the provision of organised games, swimming or athletics) (Sch 2, 56)

Premature retirement and redundancy

Dismissal or premature retirement when costs cannot be charged to maintained schools (Sch 2, 78)

Monitoring national curriculum assessment

Monitoring of National Curriculum assessments (Sch 2, 75)

Haverling Attendance, Behaviour and Traveller Support Service

We aim to support schools to manage the most challenging pupils with the human resources that they currently have, hence ensuring good value for money and crucially increase staff confidence.

Introduction

The Attendance, Behaviour and Traveller Support Team provides for a central bank of knowledge and support to be available to primary and secondary school across Havering. Our team works to support a range of school staff, including members of SLT, SENCOs, teachers and support staff. We also work closely with parents/carers, undertaking home visits where appropriate, with the aim of reducing barriers to good attendance/school engagement and reminding parents of their legal responsibilities where necessary.

A key part of our role and one which we believe sets us apart from other approaches, is our joint work with other key professionals in Health and Social Care. This year the team has forged working partnership with the Early Help Service. This work has enabled us to advocate for a more holistic and education focussed approach to supporting pupils at risk of school disengagement and to support schools where thresholds for early help/social care intervention are not being met.

The Attendance and Behaviour Team would like to request that Schools Funding Forum give a mandate for them to continue support for schools to help bring about further positive change, and to build on existing work to support a much needed multi agency approach with our most vulnerable pupils.

In the last academic year the service actively supported 213 students who are challenging in the classroom, disengaged from learning or undertaking a school transition move through the IYFAP process.

Our Core Offer to LA Maintained Schools

- Support for up to four individual children per primary school per academic year (this may vary depending on the current need in the school) at risk of disengagement/exclusion depending on the Waves threshold.
- A Pastoral Support Plan is devised, including the students' parents and other key professionals involved.
- SMART targets will be set that are meaningful and individualised, some in-class support and progress closely reviewed.
- Some students will be worked with individually in the classroom and some will offered a programme of group-work to promote and enhance learning behaviour in the classroom.
- School professionals can also be supported through our comprehensive professional development training programme (listed below).

- Schools are entitled to choose a one-day training per year as part of the core offer, we have also greatly appreciated in this academic year schools sharing trainings across sites as some trainings such as Team Teach have been in very high demand.

Attendance Officer Support:

It is important to note that school attendance is coming under increasing scrutiny, with the persistent absence (PA) rate now defined as below 90% as opposed to 85%. We offer EVERY school an experienced named officer/s who will work flexibly with schools and visit regularly to monitor attendance, advise and work with schools and families to improve attendance.

The package of support provided to schools in the de-delegated arrangements includes bi-weekly or monthly visits to your school by a named officer to oversee patterns of non-attendance. This includes early intervention when patterns of poor attendance arise and multi-agency working to support the family and improve outcomes. In-school training is provided for school staff on attendance matters on SIMS plus templates, monitored late gate, presentations at new intake meetings, staff meetings and school assemblies. In addition:

- Advice and guidance when a parent wants to educate their child at home.
- Provision of advice and guidance on child protection issues.
- Regular support from a linked Attendance and Behaviour Support Officer (including absence cover when linked officer is unavailable due to ill health, etc.)
- Advice and guidance on promoting early intervention for pupils with poor attendance.
- Guidance on strategies for managing pupil absence.
- Detailed casework with pupils with low attendance that will reach the threshold for legal intervention, if required.
- Outreach work with pupils and families, including home visits and attendance at multi-agency meetings and case conferences for pupils causing serious concern.
- Meetings at school with staff and parents.
- Cross border liaison in relation to out-borough pupils.
- Pre- Ofsted 'health check'

Primary schools have particularly appreciated our updated attendance leaflets for parents and the two new fridge magnets and parents medical advice booklet.

The above support is in addition to the statutory service provided as follows:

- Guidance for children on child protection plans and children missing from education
- Issuing and full administration of Fixed Penalty Notices including holiday fines
- Presentation of cases in court that meet the legal threshold for prosecution

Dedicated duty telephone service

To cover any kind of query related to attendance, behaviour, traveller support or exclusion we offer a dedicated Mon-Fri 9am-5pm duty telephone system for EVERY school in Havering, where a member of our team will be here to answer any questions and provide you with a quick and timely follow-up.

Dedicated Traveller Education Support

We have a wealth of experience of dealing with traveller families. With the dedicated support of our specialist Traveller Education Support Officer and our knowledge of the traveller community we aim to improve the attendance, educational outcomes and school engagement of all pupils from a traveller background. We maintain close and regular contact with parents. We visit families living on privately owned sites, fairgrounds and circuses as well as those in private and

council accommodation, by building trust and confidence. This has led to an increase in school attendance, and a wider participation in the life and activities in Havering schools.

Our commitment:

- Support positive relationship building between Traveller families and schools
- Liaise with other agencies within the Borough to improve the quality of services available to traveller families.
- Provide intensive support packages and initial integration support for pupils who demonstrate great need.
- Share information with other agencies, schools, out of borough authorities by developing systems and protocols where necessary, and develop and maintain effective joint working relationships.
- School presentations, parent meetings and trainings according to need.

Training/CPD offer to all schools and Academies on a BUYBACK offer.

The core training offer is flexible in terms of venue, full-day/half day and twilight options. **LA maintained schools** are entitled to **one whole day** training inclusive, selected from the list below. We offer a wide training menu to schools depending on the needs of the school in consultation and partnership with the Head teacher. We will deliver training packages that will improve the implementation of policy into practice and enhance the confidence of school staff. These packages are approved and recommended by the DfE, NICE and OFSTED. We can train whole school staff teams or smaller targeted groups of staff; teachers, NQT's, TAs and SMSAs.

Trainings available to you are:

- Positive Classroom Behaviour Management for teachers, including NQT's and support staff support via CPD programme to assist teaching staff in developing understanding of the motivations behind children's challenging behaviour. Key stage 1-4
- NQT Behaviour Classroom Management Key Stage 1-2
- Positive Lunchtimes! – a specific half day training for SMSAs in-line with the new OFSTED framework Key stage 1-2
- Accredited 1 and 2 day Team Teach Training: de-escalation and positive handling Key stage 1-4 (with staff groups of more than 24 staff at any one time there may be a minimal extra cost for extra tutors for this course only in line with accreditation specifications)
- Restorative Approaches –a whole school approach to behaviour management. We are able to offer whole school or part school training across key stages 1-4. (Please note this training requires more than 1.5 days commitment and some parts of the training require additional purchase).
- Problem solving and circle time. Programmes/workshops that promote better social skills and related to the PSHE curriculum using the 'Dina Dinosaur' programme, building capacity and developing a school culture. Key stage 1-2
- Engaging Traveller Families Workshop Key stage 1-4
- Teacher and staff reflective problem solving sessions Key stage 1-4
- Training for Governors and schools on the attendance legal framework Key stage 1-4

Our training packages are well researched and received, providing enormous value when compared to the price charged by private providers for similar training programme for example if a whole school one day Team Teach Positive Handling Training was booked through Team Teach Ltd would cost in excess of £2,600!. We train over 1700 staff each year.

Why continue with us?

As well as always taking a professional and flexible approach, you'll find us friendly and welcoming too. We pride ourselves on our customer service and we value excellent communication with all our customers.

Our service is backed by educational and therapeutic specialists who work with you to achieve and maintain student well-being and direct access into a multi-disciplinary service of excellence. For quality assurance all of our staff members are suitably qualified and highly skilled within their job role. All staff attends regular training and our case work is closely supervised by senior staff members.

We also keep schools informed and staff trained on new and emerging initiatives to help promote and maintain good attendance and behaviour in school; we provide guidance that is both purposeful and practical.

EVERY service that we work with has access to our 5 day a week on-call duty service, where any questions you have regarding absence, safeguarding or general advice will be answered or we will sign post you to the most suitable service to meet your needs.

As a comparison an example of a costed buyback package for an individual average sized Havering primary school would be:

Attendance package: £3,868

Behaviour PSP Support for four students £2,600 (without additional in-class support\)

Transition support per child £650.00

1 day INSET training £500

Total **£7,618** average per school.

For further discussion, please contact: Penelope Denny (Attendance, Behaviour and Traveller Support Service Manager) email: Penelope.denny@haverling.gov.uk or call 01708 433828

Ethnic Minority Achievement Service - Proposal to maintain a central EAL team

Through the national funding formula primary schools now receive £557.25 per EAL pupil. In 2018-19 it was agreed that £62.85 of that amount would be de-delegated to maintain the central team and for a contingency of £25,000 to target to schools with large in-year intakes of EAL pupils.

For 2019-20, is proposed that the de-delegated amount is reduced to £49 per EAL pupil which will mean that schools retain 91% of their funding. This will generate a budget of £100,000 towards the cost of the central EAL Team (the balance to be funded from traded income) and a contingency of £10,000 for schools that experience rapid demographic change.

Rationale for maintaining a central team with EAL expertise in Havering

- The Havering EAL team is one of the few remaining services in London and the South East that is able to provide regular, direct consultancy support to ensure schools meet the needs of their changing populations. We use local knowledge to provide tailored support to meet the precise needs of your school.
- The central team has a crucial role to play in managing school-to-school support networks and ensuring the sharing of best practice. Our established networks of EMA co-ordinators and EAL TAs could be at risk if these functions were not managed centrally.
- The demographic of Havering is continuing to change with increasing numbers of children transferring directly from abroad with little or no English. A recent DfE analysis of language proficiency data has shown that, in January 2017, Havering was ranked 11th in the country in terms of the percentage of EAL learners in the early-stages of acquiring EAL. Children with EAL are a potentially vulnerable group who may underachieve if their on-going needs are not recognised or addressed. In addition to providing advice on the needs of newly-arrived pupils, the EAL team can help schools address the needs of more advanced learners of EAL in order to address any barriers to their academic potential.
- De-delegation allows ease of access to the service in the case of schools that may have little experience of meeting the needs of early-stage EAL learners but that may suddenly experience demographic change; it also allows rapid access to support where needs might arise suddenly due to staff turnover and loss of expertise.
- In addition to the support outlined above, the EAL team is also able to provide consultancy advice and CPD focusing on SMSC and British Values provision
- De-delegation agreed before the start of a financial year gives the LA financial certainty that it can continue to fund the EAL team.

Training and consultancy advice for schools:

- Delivery of EAL health-check audits using historical and 'live' data to help identify and address achievement gaps and strengthen their provision
- Unlimited access to a range of central CPD with a focus on EAL, provision for minority ethnic learners and SMSC development/British Values
- Termly networking meetings for EAL co-ordinators and EAL TAs
- Strategic support for HTs and SLTs

- Operational support for Inclusions Managers, Class Teachers and TAs
- Prompt contingency support for schools, e.g. school visits to discuss admissions and induction arrangements for newly-arrived learners
- Support with the assessment and tracking of learners whose starting points are different from other learners, linking EAL-specific assessment to your school's own systems
- Support with distinguishing between the needs of children learning EAL and those with SEN and assistance with the gathering of evidence for EHCP applications
- Direct access to telephone and email support
- Tailor-made school-based CPD twilight sessions on request
- Free access to a comprehensive range of resources via the HES Portal and also via Havering's Fronter MLE site; and recommendations/advice on commercially available publications (e.g. dual language books and dictionaries)
- Advice and training in the use of key publications, e.g. those produced by the team and archived National Strategies materials
- Training in high-quality EAL interventions, including Talking Partners and Talking Maths (small fee applies for initial training but ongoing support is available at no additional charge)

Strategic work with LA-based services on behalf of all LA schools, and Academies buying back services, through liaison with:

- the Admissions team to facilitate the admission and induction of vulnerable learners;
- the Family Learning team to provide information on services which may be available to schools such as ESOL classes;
- other education teams (e.g. Learning Support) to facilitate transitions for vulnerable pupils;
- the LMS team to ensure assessment of EAL learners reflects best practice;
- EAL specialists in neighbouring local authorities to ensure effective collaboration and consistency of EAL provision.

Agenda Item 10



Havering
LONDON BOROUGH

Schools Funding Forum 20th September 2018 ITEM 10

Subject Heading:

Schools Financing Scheme 2018-19

Report Author:

**David Allen – Strategic Finance
Manager**

Eligibility to vote:

**Representatives of LA maintained
schools**

SUMMARY

This report is for the representatives of LA maintained school to consider the Schools Financing Scheme for 2018-19.

RECOMMENDATIONS

To approve the Schools Financing Scheme for financial year 2018-19 and for 2019-20 subject to any directed changes from the DFE.

REPORT DETAIL

Every local authority is required to have in place a scheme for financing schools under Section 48 of the Schools and Standards and Framework Act 1998.

The Scheme sets out the financial relationship between the London Borough of Havering and the maintained schools which it funds. It contains requirements for financial management and related issues, which are binding on both Havering LA and on schools.

Schools Forums have the power to approve schemes proposed by their local authorities although only schools members may vote.

Havering's Scheme follows closely the statutory guidance from the DFE for local authorities in constructing their schemes which can be found in the weblink as follows: <https://www.gov.uk/government/publications/schemes-for-financing-schools>

Havering's full Scheme and Annexes will be tabled at the meeting.

The Regulations state that schemes must deal with the following matters:

1. The carrying forward from one funding period to another of surpluses and deficits arising in relation to schools' budget shares.
2. Amounts which may be charged against schools' budget shares.
3. Amounts received by schools which may be retained by their governing bodies and the purposes for which such amounts may be used.
4. The imposition, by or under the scheme, of conditions which must be complied with by schools in relation to the management of their delegated budgets and of sums made available to governing bodies by the authority which do not form part of delegated budgets, including conditions prescribing financial controls and procedures.
5. Terms on which services and facilities are provided by the authority for schools maintained by them.
6. The payment of interest by or to the authority.
7. The times at which amounts equal in total to the school's budget share are to be made available to governing bodies and the proportion of the budget share to be made available at each such time.
8. The virement between budget heads within the delegated budget.
9. Circumstances in which a local authority may delegate to the governing body the power to spend any part of the authority's non-schools education budget or schools budget in addition to those set out in section 49(4)(a) to (c) of the 1998 Act.
10. The use of delegated budgets and of sums made available to a governing body by the local authority which do not form part of delegated budgets.
11. Borrowing by governing bodies.
12. The banking arrangements that may be made by governing bodies.
13. A statement as to the personal liability of governors in respect of schools' budget shares having regard to section 50(7) of the 1998 Act.

14. A statement as to the allowances payable to governors of a school which does not have a delegated budget in accordance with the scheme made by the authority for the purposes of section 519 of the 1996 Act.
15. The keeping of a register of any business interests of the governors and the head teacher.
16. The provision of information by and to the governing body.
17. The maintenance of inventories of assets.
18. Plans of a governing body's expenditure.
19. A statement as to the taxation of sums paid or received by a governing body.
20. Insurance.
21. The use of delegated budgets by governing bodies so as to satisfy the authority's duties imposed by or under the Health and Safety at Work etc Act 1974.
22. The provision of legal advice to a governing body.
23. Funding for child protection issues.
24. How complaints by persons working at a school or by school governors about financial management or financial propriety at the school will be dealt with and to whom such complaints should be made.
25. Expenditure incurred by a governing body in the exercise of the power conferred by section 27 of the 2002 Act.

Directed revisions

The Scheme remains largely unchanged between years but may be subject to directed revisions by the Secretary of State. Directed revisions for 2018 are as follows:

Loans will only be used to assist schools in spreading the cost over more than one year of large one-off individual items of a capital nature that have a benefit to the school lasting more than one financial or academic year. Loans will not be used as a means of funding a deficit that has arisen because a school's recurrent costs exceed its current income. If loans are made to fund a deficit and a school subsequently converts to academy status, the Secretary of State will consider using the power under paragraph 13(4)(d) of Schedule 1 to the Academies Act 2010 to make a direction to the effect that such a loan does not transfer, either in full or part, to the new Academy school.

Other DFE updates to the guidance

Updates have been made to the guidance, to mirror changes in the Schools and Early Years Finance (England) Regulations 2018.

Paragraph 4.8 has been updated to reflect changes on balances of closing schools, as detailed under Regulation 25 (9).

4.8 Where in the funding period, a school has been established or is subject to a prescribed alteration as a result of the closure of a school, a local authority may add an amount to the budget share of the new or enlarged school to reflect all or part of the unspent budget share (including any surplus carried over from previous funding periods) of the closing school for the funding period in which it closes.

Annex B: Responsibility for redundancy and early retirement costs has been updated to reflect changes under Schedule 2 Part 7, of the Finance Regulations. This details how a local authority can retain a central budget within the schools budget to fund the costs of new early retirements or redundancies by a deduction from maintained school budgets (excluding nursery schools) only, where the relevant maintained school members of the schools forum agree.

Additional updates made include the removal of wording in paragraph 2.3.1, as regulations no longer allow local authorities to issue budget shares for a multi-year period.

References to the Audit Commission have been removed from paragraph 2.6, as this has been abolished.

Within paragraph 6.2.15, 'statement of SEN' has been replaced with 'Education Health and Care Plan (EHCP)'.

Agenda Item 11



Havering
LONDON BOROUGH

Schools Funding Forum 20th September 2018 ITEM 11

Subject Heading:

Teachers Pay Award 2018 and grant funding

Report Author:

David Allen – Strategic Finance Manager

Eligibility to vote:

All members

SUMMARY

This report anticipates an announcement of the detail following the announcement of the teachers' pay award for September 2018 including the arrangements for the element of the award that is to be funded from Government grant. If not received by the date of the meeting this item will be withdrawn.

RECOMMENDATIONS

That the Schools Funding Forum notes the arrangements for grant funding the teachers' pay award.

REPORT DETAIL

In July 2018 the DFE announced an investment of £508 million to fund the 2018 teachers' pay award. The pay award was announced as 3.5% for classroom teachers, 2% for those on the upper pay range and 1.5% for those in leadership positions. Although the announcement was for a fully funded pay award the detail shows that it will be funded above the 1% that had been previously assumed prior to the announcement.

At the time of writing, details of the award and the methodology for distributing the grant have not been received.

Schools Funding Forum 20th September 2018

ITEM 12

Subject Heading:

Pupil Behaviour and Inclusion

Report Author:

David Allen – Strategic Finance Manager

Eligibility to vote:

All members

SUMMARY

This item sets out the funding that is allocated from the High Needs Block to support pupils with challenging behaviour. Alternative Provisions are available for pupils that have become disengaged from their mainstream education, as well as supporting those pupils that have been permanently excluded. Support for primary schools is available through the Waves of Intervention thresholds. Some changes in the contributions from schools towards the costs of support for individual pupils are recommended.

RECOMMENDATIONS

It is recommended that some changes are made to the current funding arrangements to reduce the demand on the High Needs Block. These changes are to ensure the monitoring of pupils who are currently being home educated, to increase school contributions to placements in alternative provision and withdraw funding for pupils taken off roll. Agreement is requested as follows:

- (i) To deduct the AWPU + 10% from schools that remove pupils from their roll following decisions to home educate as set out at 3.1 below;
- (ii) To amend the calculation of the contribution of schools who place pupils in alternative provision as set out at 3.2 below;
- (iii) To deduct the AWPU + 10% from schools that remove pupils from their roll following permanent placement at The Bridge medical needs provision as set out at 3.3 below;

- (iv) To note the charge to schools of £6,000 per term for pupils placed temporarily at The Bridge medical needs provision above its funded place number as set out at 3.3 below;
- (v) To support the managed moves process, following successful placements, the LA retains the difference between the value of the AWPUP deducted from the exiting school from the start of the 8 week trial period and the funding allocated to the admitting school from the end of the 8 week trial period as set out at 3.4 below.

REPORT DETAIL

1. Provision

Havering has a range of strategies in place to support pupils with challenging behaviour and to place pupils in alternative provision who have disengaged from their education and/or are at risk of permanent exclusion. Funding of this support is through the DSG High Needs Block. These are summarised as follows:

Olive Alternative Provision (AP) Academy

For KS3 and KS4 pupils who have been permanently excluded from school.

Olive also offers a 6 week intervention programme to reduce the risk of exclusion. The AP Academy is funded for 64 places.

Pupils supported in academic year 2017/18: 55.

The Bridge – Medical Provision

The Bridge provision is for secondary aged pupils with medical needs. This provision meets the LA's Statutory Duty to provide access to education when a pupil is absent from school for more than 15 days on medical grounds. The Bridge also provides an outreach service. The Bridge is funded for 20 FTE pupils.

Pupils supported in academic year 2017/18: 39.

Hospital Education

Queens Hospital has 30-bed children's ward called Tropical Lagoon and a 14-bed day assessment and treatment unit called Tropical Bay. The LA ensures continuity of education for pupils who are in hospital for long periods or for regular treatment.

Pupils supported in academic year 2017/18: 28 out patients, 12 in patients.

Elective Home Education

Currently there are 197 pupils who are home educated. There is a small budget of £20,000 to visit homes to ensure that education is being provided. The Admissions and Inclusions Team has identified several children who should be encouraged back into mainstream school and a proposal on how to increase the resource in support of this is at section 3.1 below.

Pupils supported in academic year 2017/18: 197

Social Inclusion Funding Support for Mainstream Pupils

Where agreed through the Admissions and Inclusions Assessment Gateway, Alternative Provisions (AP) can be used as appropriate to meet the needs of individual pupils. Placements can be made from a range of registered and approved alternative providers. Schools meet the costs of the placement from their own budgets and are able to reclaim the costs less the Aged Weighted Pupil Unit (AWPU) for the relevant period from the Social Inclusion Fund.

Pupils supported in academic year 2017/18: 123

A proposal to amend the calculation of the deduction is at section 3.2 below.

Year 11 AP Census Pupil Placements

The AP census is a programme that is in place to support some young people moving into the Borough that are unable to attend or access mainstream education. Placement in a school is sometimes not an appropriate provision. The Local Authority holds a small budget to place pupils in appropriate, approved alternative provisions.

Pupils supported in academic year 2017/18: 33

Transition Programme - Pupils on Route to Education Health Care Plan (EHCP)

Full time placements are available for primary and secondary pupils who are unable to remain in their mainstream school setting due to Special Educational Needs and Disabilities (SEND) and high risk of permanent exclusion. The programme is designed to support pupils through the SEND Statutory Assessment Process.

Pupils supported in academic year 2017/18: 11 and an additional 99 pupils supported using other AP options who had EHCPs or were on school support and were at high risk of exclusion.

Out of Borough Placement for Primary Excluded Pupils

In the event of a primary permanent exclusion where the pupil requires access to a PRU place, a contingency budget is required to be made available so an out of borough place can be commissioned across border to support the pupil.

Pupils supported in academic year 2017/18: 1

Admissions & Inclusions Team

The team works to support all schools to ensure that vulnerable pupils, those with mental health problems and those who are high risk of permanent exclusion are able to engage in education.

Support is provided to head teachers, schools, parents and other internal and external agencies working with pupils who are at risk of permanent exclusion. The team offers statutory guidance and encourages good practice through partnership working with registered and approved alternative providers to reduce the incidences of disengagement and exclusion.

Where pupils are permanently excluded, the team facilitates and arranges provision from the sixth day of a permanent exclusion in line with statutory duties. The team supports schools and families by providing advice relating to legal processes around permanent exclusions.

The team facilitates and chairs the In Year Fair Access Panel (IYFAP) for secondary schools to support Schools / Academies with their vulnerable pupils to avoid exclusion and ensure appropriate placement is identified either in mainstream or Alternative Provisions.

The team facilitates and chairs the Primary Inclusions Network Meetings (PIN) for primary head teachers to support collaborative working to ensure primary schools are given access to resources to support highly complex vulnerable pupils within their school.

The team monitors the quality of all registered and approved alternative provision available for schools to commission. This enables schools to secure the best outcomes for children and young people attending Havering schools.

Pupil Attendance, Behaviour and Traveler Support

The Attendance, Behaviour and Traveller Support Team provides for a central bank of knowledge and support to be available to primary and secondary school across Havering. The team works to support a range of school staff, including members of SLT, SENCOs, teachers and support staff. The team works closely with parents/carers, undertaking home visits and comprehensive pastoral support plans where appropriate with the aim of reducing barriers to good attendance/classroom engagement and reminding parents of their legal responsibilities where necessary. There are strong links with statutory and voluntary agencies that have responsibility and accountability for children and young people at most risk of exclusion and/or disengagement from school.

Behaviour and Transition support for Managed Moves and year 6-7 Transitions

In the last academic year 213 individual children in schools were actively supported who were displaying challenging behaviour or undertaking a school transition move through the IYFAP process. Requests for individual student support come through a referral form or IYFAP gateway, via the Waves of Intervention thresholds.

A Pastoral Support Plan is devised, including the students' parents and other key professionals involved. SMART targets will be set that are meaningful and individualised, some in-class support and progress closely reviewed. Some students will be worked with individually in the classroom and some will offered a programme of group-work to promote and enhance learning behaviour in the classroom. School professionals can also be supported through our comprehensive professional development training programme.

In-Reach Service

The local authority currently has a statutory duty to provide alternative full time education for all pupils who are permanently excluded and have reached the need for a Wave 4 intervention. The Primary Inclusions Gateway acts as a conduit and decision making forum in relation to primary aged pupils who are at risk of permanent exclusion or who have been permanently excluded from their mainstream school. Pupils with challenging behaviour are offered in-class support and intensive transition support into another mainstream school/specialist provision is proposed. The IN-Reach Primary Intervention Service is a new initiative shaped within an active working partnership with Education and Havering's Early Help Service. Under the supervision of the Early Help Service, In-Reach also provides two School Support Family Practitioners that are allocated to the whole family, undertake an Outcome Star Assessment to improve family relationships and provide a safeguarding lead. The development of the RJ Mitchell classroom is a flexible and agile placement for children aged between five and eleven years and their families who are being identified as at risk of possible exclusion from their full time education placement; students also have access to CAMHs and SALT assessments. A school based counselling service

is also offered for pupils where appropriate, for quality assurance this service is supervised by our own in-house clinical team. 1-1 and group-work is offered.

2. Funding Implications for Schools and the DSG High Needs Block

The total cost to the High Needs block of all alternative provision, behaviour support and inclusion in 2018-19 is £24.3m which is 12.6% of the total High Needs budget. Other than contributions by schools towards the cost of placements in alternative provision, all of the above provision is funded from the DSG High Needs block with no charge to individual schools. Schools' funding is, however, adjusted for the following:

- 2.1 Pupils who have been permanently excluded from school.
There are DFE regulations in place which determine the calculation of the deduction of AWPU and Pupil Premium from excluding schools for the relevant period.
- 2.2 Managed moves between schools.
These are agreements through the In Year Fair Access Panel (IYFAP) for pupils to be moved between Havering schools. This is on an 8 week trial basis after which, in the case of a successful move, the value of the AWPU for the remainder of the academic year is recouped from the exiting school and passed to the admitting school. The calculation of the funding follows that for permanent exclusions.

Pupils supported in academic year 2017/18: 152

A proposal to amend the calculation of the deduction is at section 3.4 below.

3. Proposals

3.1 Home Education

Schools that remove pupils from their roll who have elected to be educated at home currently retain the funding that was allocated for that pupil. It is proposed to deduct the AWPU + 10% for the date the pupil was removed from the school register to the end of the financial year. This funding will be used in support of re-engagement back into an education establishment.

3.2 Alternative Provision

The current financial arrangements for alternative provision are that:

- An appropriate placement is agreed through the Assessment Gateway with the support of the LA
- The referring school is invoiced by the provider for the cost of the placement
- The school is reimbursed from the central Social Inclusion Fund for the cost of the placement less the value of the AWPU for the relevant period

There is no proposal to change the above process but, prompted by the reduction in the value of the AWPU and the pressure on the Social Inclusion Fund it is proposed to make the following changes:

- (i) The value of the AWPU to be deducted from a school's claim for reimbursement to be changed to AWPU + 10%. The 10% broadly represents the funding the school receives through deprivation factors in addition to the AWPU.

- (ii) The calculation of the reimbursement to schools from the costs of AP to be based on 40 rather than 52 weeks

Example for an AP placement of one term (12 weeks):

Pre NFF contribution from school at KS3 AWPU
 $\text{£}4,542 / 52 \text{ weeks} \times 12 \text{ weeks} = \text{£}1,048$

Post NFF contribution from school at KS3 AWPU + 10%
 $\text{£}4,108 + 10\% / 40 \text{ weeks} \times 12 \text{ weeks} = \text{£}1,355$

3.3 Medical Needs Provision

Although some placements of pupils at The Bridge medical needs provision are temporary and therefore dually registered, for some the placement is permanent. It As with Home Education it is proposed to deduct the AWPU + 10% for the date the pupil was removed from the school register to the end of the financial year. This funding will be used in support of the vulnerable pupils.

Once The Bridge is full at 20 FTE, there is capacity to offer placements to secondary schools at £6,000 per term.

3.4 Managed Moves for secondary pupils

To support schools with this process the Inclusion Team identifies a suitable school for the managed move, supports the transition and manages the transfer of the AWPU from the exiting school to the receiving school following a successful managed move. The Local Authority proposes to charge schools for the administration of this process by:

- (i) Introducing a charge of £30 to each referring school for administering the process
- (ii) For successful managed moves, retention of the AWPU for the duration of the trial period. There will be a robust process implemented to assist all schools.