

Formula Review Meeting

Minutes

Friday 16th October 2020

Microsoft Teams Meeting

Present:

Patti Jones (Acting Chair)
Dominic McKeon
Jo Briggs
Claire Whalley
Julie Cheung
Susan Tailor
Adeel Sahi
Joan Saunders
Matthew Wilkinson

Secondary Governor
Secondary Head Teacher
Primary Head Teacher
Primary Head Teacher
Primary Head Teacher
Special Head Teacher
Secondary Business Manager
Primary Business Manager
Union Representative

Lisa Butcher
Julie Edwards
Helen Joseph

Head of Finance
Schools Finance Manager
Schools Finance Officer

Apologies: Apologies were received from Dave Bevitt and Stephen Gribbon

1. Welcome

As the position is currently vacant Patti Jones agreed to chair the meeting and welcomed everyone.

2. Minutes 11th September 2020

Minutes were agreed.

JE confirmed that the teachers' pay award had been agreed and should be paid in November backdated to September. JE also informed the group that Exceptional Costs claims excluding 'other' would be reimbursed. The 'other' costs would be reviewed soon plus the Catch-Up premium funding has also been paid to schools.

3. 2021-22 Budget Consultation

JE presented a paper on School Funding Arrangements 2021-22 with assumptions based on the same principles as previously – moving towards NFF (National Funding Formula). Bolton match the NFF except the Prior Attainment factor which is only £7 less.

Headlines for 21-22 include:-

- Teachers' Pay and Pension Grants will cease and should be reflected in local funding formulae
- The incorporation of the 2019 IDACI data

- The Minimum Per Pupil Levels (MPPLs) remain mandatory at £4,180 for primary and £5,415 for secondary (figures now include teachers' pay and pension grants)
- LA's have the freedom to set the Minimum Funding Guarantee (MFG) between +0.5% and +2% per pupil with teachers' pay and pension grants added to the baseline
- LA's can continue to transfer up to 0.5% of their Schools block other blocks of the DSG, with Schools Forum approval
- LA's will continue to use 2019 assessment data as a low prior attainment proxy in funding formulae following cancellation of assessments in summer 202 due to Covid-19.
- Provisional DSG for 2021-22 is an increase of 7.8% (early years block yet to be announced) – the schools block will be updated following the October 2020 census. Central Schools Block has reduced as expected by 20%.

Items to be consulted on with schools: - MFG, Formula Factors, High Needs Transfer and Dedelegation.

JE showed the group the increases on individual factors and how 3 different schools would be affected by the proposals. She also confirmed that only a small number of secondaries would be receive MFG and no schools are now capped since the changes to the formula in 20-21.

4. High Needs Financial Position

JE presented the financial position to the group and explained the reason for the increase in expenditure of £1.9m. LB acknowledged that a substantial amount of work had been carried out regarding high needs provision, however the budget remains overspent. There are various reasons for this including the time taken for projects to implemented and increased demand. The DSG has now to be reported and accounted for separate from the LA budgets. When benchmarked against other North West authorities for the level of deficit, Bolton is the fourth highest. Inclusivity work is currently being carried out on behalf of the Council by Wendy Fairman.

Action:- LB to arrange for a representative from High Needs to attend a future meeting.

JB proposed that High Needs to be discussed in detail at a separate one agenda item meeting

Action:- JE to arrange a date for the High Needs meeting

5. Quarter 2 Monitoring

JE presented an update on the DSG quarter two outlining the adjustments to the budget and pointed out that the Early Years Block is now overspent as numbers are not back to normal due to the pandemic and some double-funding of providers.

6. Impact of Covid – School Census

JE reported that the census on the whole was straightforward but with a possible issue around Universal Infant Free School Meals as the funding is based on meals taken on census day. Schools can use the numbers from a different 'normal day' if required to ensure funding isn't affected.

7. Trade Union Facilities Time (letter)

JE brought to the attention of the group a joint letter that had been received from the NAHT, NEU and ASCL regarding the request for dedelegation of the facilities time to maintained schools and

SLA to academies. In Bolton, schools and academies can buy back the service via an SLA. MW said the only issue was that some large academy trusts only pay for face to face time and not the hours of work that happens in the background, and feels it is unfair.

Action:- JE to feed back to Tanya Johnson (HR) and JOG

8. Schools Forum Agenda

JE advised the group that there were two items – Quarter 2 monitoring and the budget consultation.

9. Forward Plan

Forward plan of meeting dates was discussed and reviewed including the separate High Needs meeting in November

10. Date of Next Meeting

Friday 15th December at 8.30am

MS Teams