

Rochdale Schools Forum

Annual Report for the Academic Year 2007/08

Schools Forum is a statutory body with important functions relating to schools finance. It is also an important consultative body for the Local Authority, and all strategic financial decisions impacting upon schools are discussed and consulted upon with the Schools Forum. The input provided by members of Forum is invaluable to the LA in establishing our partnership approach and understanding the impact on schools and stakeholders prior to important strategic funding decisions being made.

Attached is the annual report which details activities undertaken by Forum during the academic year 2007/08. This report was presented to Forum at their meeting on 2nd October 2008.



ROCHDALE
METROPOLITAN BOROUGH
COUNCIL

Report to the Schools Forum

Date: 2nd October 2008

Title Schools Forum – Annual Report 2008/09

1. Purpose of the report.

- 1.1. To provide an annual report of the activities and decisions taken by Schools Forum for the Academic Year 2008/09.

2. Background.

- 2.1.A Review undertaken by external consultant (Public Sector Consultants) recommended an Annual Report be provided outlining the issues considered by Forum and decisions taken for each Academic year. This is to both to provide Members with a remembrance of the work undertaken but also to provide information to stakeholders on the activities undertaken by School Forum.

3. Strategy and Context.

- 3.1.Schools Forum is an important body with some statutory functions with regard to Schools finance. It is also an important consultative body for the Local Authority (LA) and all strategic financial decisions impacting upon schools are discussed and consulted upon with the Schools Forum. The input provided by members of Forum is invaluable to the LA in establishing our partnership approach and understanding the impact on schools and stakeholders prior to important strategic funding decisions being made.

4. Findings

4.1. General

- 4.1.1. Schools Forum met six times during the Academic Year 2007/08. All meetings were quorate. A Review of the procedures and Terms of Reference for Schools Forum was undertaken during the period with changes to the Terms of Reference and membership taking place.

4.2. Regularity.

4.2.1. Under the Schools Forum Regulations, Forum has a number of statutory functions. Work undertaken and decisions taken during the period were on:

- 4.2.1.1. Schools Outturn and Reportable Surpluses. Forum were presented with details of Final Schools Outturns together with details of those schools with reportable surpluses for the year ending March 2007 and information on the proposed use of these reportable surpluses, As a result of this information, following consultation with all schools, Forum considered and agreed to an objective clawback scheme on reportable surpluses w.e.f 2007/08 outturns. It was agreed there be no clawback of reportable surplus amounts for 2006/07.
- 4.2.1.2. Change to the Scheme for Financing Schools – Balances from Closing Schools. Forum agreed to a change to the Scheme to enable balances from closing schools to revert to the Local Authority (LA) rather than the successor school, to enable a more strategic use of these funds to be considered. Any decisions taken on the use of the funds would be in consultation with Forum.
- 4.2.1.3. Dedicated Schools Grant (DSG)/ ISB and Centrally Retained Expenditure. Forum approved the allocation of the DSG between that delegated to schools (ISB/ ISSB) and that retained centrally by the LA to be spent on schools related issues.

4.3. Changes to the Local Formula.

4.3.1. Schools Forum agreed to the following changes to the local formula:

- 4.3.1.1. 14-16 Practical Learning Options. 25% of the targeted monies for 2008/09 (currently delegated to secondary schools) be retained centrally to support strategic development for the introduction of practical learning options and diplomas. This to rise to 50% in 2009/10.
- 4.3.1.2. A change to the factor for Schools Meals factor with the price per meal in the formula being increased to reflect current prices in line with work undertaken with the Facilities Management Service.
- 4.3.1.3. Former Teachers Pay Grant – the data on which the distribution of monies in the factor be changed to reflect the current position for teachers on threshold rather than historic data being used.

- 4.3.1.4. Standards Fund – the factor in the formula be removed as it was designed as a temporary measure to remove fluctuations in funding in 2004/05.
- 4.3.1.5. Personalisation Monies. A change to the allocation of these monies was agreed from a flat per pupil amount to 50% targeted on pupils from deprived backgrounds and poor attainment levels. This was following recommendations from the Deprivation Working Group which undertook a Review of Funding for Deprivation.
- 4.3.1.6. Modelling on the impact of each change for each sector and individual schools was provided and considered by Forum prior to decisions being made.

4.4. Standards Fund

- 4.4.1. Forum were consulted on the allocation of certain Standards Fund Grants as required under DCSF Guidelines. These were Ethnic Minority Achievement Grant, Music Grant, School Lunch Grant and LIG Transitional Funding. Allocation of Extended schools monies has yet to be agreed.

4.5. 14- 19 Funding

- 4.5.1. Forum were consulted on allocation of funding specifically for diplomas for 2008/09. As this funding for 2008/09 only relates to the Middleton schools it was agreed the Middleton Consortium of Heads agreed to the distribution. Work continues on the options for allocating funding relating to 14-19 Practical Learning options and diplomas as the programme becomes more widespread.

4.6. DCSF Legislation/ Consultation Documents

- 4.6.1. Forum considered and input into consultation documents on the following:
 - Dedicated Schools Grant Formula Review (ongoing)
 - Schools Capital proposals (outcome and guidance issued by the DCSF in Autumn 2008)
 - DCSF Consultation on Funding for Exclusions in Academies (outcome and guidance issued by DCSF in Autumn 2008)
 - In addition they were informed about major changes resulting from the Guidance on New Funding Arrangements for DSG and schools which was issued by the DCSF and took effect in April 2008.

4.7. Reviews Undertaken

4.7.1. Forum was consulted upon and input into a number of Reviews undertaken by the LA,

4.7.1.1. Deprivation Review. The purpose of this review was to examine the funding currently targeted to pupils from deprived backgrounds and explore options for how funding could be best utilised to narrow the attainment gap between those pupils from deprived backgrounds and those not. This work was not completed in 2007/08 and will be continued in 2008/09.

4.7.1.2. Schools Forum. As outlined in Paragraph 2 the LA employed consultants to review the procedures and processes of Forum with a view to improving the effectiveness of the workings of the Group. As a result a new Terms of Reference and Membership was agreed with an increase in the number of other stakeholders as members (non schools members). Processes and general administrative arrangements have been improved as has transparency of the workings of Forum with a review of the consultative process for all schools and the setting up of a Section on the Councils website which can be accessed by members of the public.

4.7.1.3. Early Years Single Formula. Forum has been consulted on work undertaken by a Sub Group of Forum on the creation of a Single Formula for Early Years free entitlement. This is work being undertaken with the DCSF as a pilot. The single formula will be introduced in April 2009 in Rochdale and April 2010 in non pilot Authorities.

4.8. General Business

4.8.1. Throughout the year Forum received and discussed information on wider schools funding issues.

4.8.1.1. Financial Management in Schools – Forum reviewed a position statement providing details of the number of schools, who met the Standard in 2007/08. 33 schools were externally assessed in 2007/08 with 32 meeting the Standard; the school not meeting the Standard has submitted an Action Plan to the assessor.

4.8.1.2. Forum were consulted on schools capital issues namely the Primary Capital Programme, Asset Management Plan, Schools Capital Investment Programme and Building Schools for the Future.

- 4.8.1.3. Schools Specific Contingency – Forum were given regular updates on monies held in the Schools Specific Contingency.
- 4.8.1.4. Benchmarking. Information on Schools Balances Tool comparing Rochdale's balances in schools with comparative Authorities was considered.
- 4.8.1.5. Annual Schools Survey. Results of the Audit Commission Annual Schools Survey from a finance perspective was considered.

5. Summary

5.1. This report demonstrates the significant amount of work which has been undertaken by Forum in the Academic Year 2007/08 and the continuing importance of the Forum in providing decisions and input into the strategic direction for schools funding issues in conjunction with the LA.

6. Conclusions/ Recommendations

6.1. Members of the Forum are asked to note the report. A copy of this report will be posted on the Councils website for access by all stakeholders and the general public.