

THURROCK SCHOOLS' FORUM

12 March 2020 at 8:30am
Conference Centre, Harris Academy Chafford Hundred
Chafford Hundred, Grays, RM16 6SA
AGENDA

Primary Academies

Headteacher – Kenningtons	Ms J Sawtell-Haynes
Headteacher – Abbotts Primary	Mrs L James
Principal – Woodside Academy	Mr E Caines – Vice Chair
Headteacher – Giffards Primary	Mrs N Haslam-Davis
CEO - Catalyst Academies Trust	Mr T Parfett
Headteacher- East Tilbury Primary and Nursery	Mrs L Coates

Primary Maintained Schools

Headteacher – Aveley Primary	Mrs N Shadbolt
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Secondary Academies

CEO – Osborne Co-operative Academy Trust	Mr P Griffiths – Chair
Principal – Harris Academy Chafford Hundred	Mrs N Graham
CEO - South West Essex Community Education Trust	Mr S Munday
CEO – ORTU Federation Ltd	Dr S Asong
Governor – Hathaway Academy	Mr S Sweeting

Secondary Maintained Schools

Headteacher – Grays Convent	Mrs P Johnson
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Special Academy

Headteacher – Treetops School	Mr J Brewer
Headteacher-Beacon Hill Academy	Ms S Hewitt

Olive AP Academy

Executive Headteacher	Ms C Hunnisett
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Non School Members

Diocese of Brentwood	Mrs M Shepherd
Diocese of Chelmsford	Miss S Jones
0-11 Representative	Ms A Jones
11-19 Representative	Dr J Revill

Introductory Items		
Item	Item	Time Guide
1.	Welcome from Chair	1 min
2.	Apologies for Absence	2 mins
3.	Agreement of agenda, time-guide and notification of 'Any Other Business'	2 mins
Items for Decision		
4.	Dedicated Schools Grant 2019/20 and 2020/21 <ul style="list-style-type: none"> • Presented by David May 	15 mins
5.	High Needs Block 2020/21 <ul style="list-style-type: none"> • Presented by David May 	15 mins
6.	Funding arrangements for permanent exclusions 2020/21 <ul style="list-style-type: none"> • Presented by David May 	15 mins
7.	Schools Forum Structure/Membership 2020 <ul style="list-style-type: none"> • Presented by Sarah Williams 	15 mins
Items for Information		
8.	Pupil Place Planning Update <ul style="list-style-type: none"> • Presented by Sarah Williams 	30 mins
9.	Academies and Free Schools Update <ul style="list-style-type: none"> • Presented by Sarah Williams 	5 mins

10.	<p>Forward Plan</p> <ul style="list-style-type: none"> Presented by Sarah Williams 	5 mins
Closing Items		
11.	Minutes of the previous meeting held on 16th January 2020	5 mins
12.	Matters Arising	5 mins
13.	Any Other Business	5 mins
14.	<p>Date of next meeting 25 June 2020 at 8:30am Conference Centre, Harris Academy Chafford Hundred Chafford Hundred, Grays, RM16 6SA</p>	

THURROCK SCHOOLS FORUM REPORT

DATE:	12 March 2020
SUBJECT:	Dedicated Schools Grant 2019/20 and 2020/21
REPORT OF:	David May
THE REPORT IS:	For Decision

1. EXECUTIVE SUMMARY

- 1.1 On 19 December, the Secretary of State for Education announced the Dedicated Schools Grant (DSG) allocations for 2020/21, updated to reflect the October 2019 census data. The funding to be received has increased from £7.071m to £10.109m. The reason for the change, to that discussed in November, is the increase in pupil numbers of 584 from October 2018 to October 2019.
- 1.2 Thurrock Cabinet at its meeting on 12 December 2018 approved that the National Funding Formula would be implemented in full in 2020/21. This was ratified by Cabinet on 12 February 2020. Following discussion with the ESFA the inflationary increase applied to the Basic Entitlement increased from 1.68% to 2.125%. This reflects clarification of pupil growth to be included in the funding formula for the summer 2020 term. Updated school level information is shown at Appendix A
- 1.3 The High Needs Block continues to experience significant increase in demand and costs. This is presenting a very challenging position in both 2019/20 and 2020/21.
- 1.4 The report contains proposed changes to the Early Years Funding Formula including increasing the hourly rates and changes to the deprivation quantum.

2. RECOMMENDATIONS

- 2.1 The Schools Forum is asked to approve:
 - Increase in the hourly rate paid to 2 year old providers by 8p from £5.07 to £5.15 per hour.
 - Increase the hourly rate paid to 3 and 4 year old providers by 10p from £4.18 to £4.28 per hour.
 - Increase the deprivation quantum and change the formula to be based on the postcode of the child, not the setting, for 3 and 4 year olds. Deprivation funding to increase from £220,000 to £285,000.

- 2.2 The Schools Forum is asked to note the change to the Schools Funding Formula that was approved by the ESFA on 17 February 2020.

3. DEDICATED SCHOOLS GRANT 2020/21

- 3.1 On 19 December, the Secretary of State for Education announced details of Dedicated Schools Grant (DSG) allocations for 2020/21. The tables below show the funding to be received in 2020/21.

Table 1: Funding Settlement – December 2019

Dedicated Schools Grant	2020/21	2019/20	Increase
	£m	£m	£m
Schools	127.474	119.434	8.040
Central Services	1.850	2.073	(0.223)
High Needs	25.464	23.253	2.211
Early Years	12.413	12.332	0.081
Total	167.201	157.093	10.109

4. SCHOOLS BLOCK

- 4.1 In 2020/21, this funding will continue to be distributed using the Schools National Funding Formulae (NFF). The key aspects of the formula for 2020/21 are:
- The minimum per pupil funding levels will be set at £3,750 for primary schools and £5,000 for secondary schools.
 - The funding floor will be set at 1.84% per pupil.
 - It remains the government's intention to move to a 'hard' NFF, where budgets will be set on the basis of a single, national formula.
- 4.2 In 2020/21 local authorities continue to have discretion over their schools funding formulae in their area. Thurrock's key principles that have been applied in 2020/21 are:
- National Funding Formula values have been applied;
 - An inflationary increase of 1.02125 to the Basic Entitlement values, this is an increase from that previously reported;
 - Retained growth fund of £1.385m
 - Transfer of £0.635m from the Schools Block to the High Needs Block to support increase demand for Specialist placements and Education, Health and Care Plans.
- 4.3 Following discussion with the ESFA the inflationary increase has increased from 1.68% to 2.125%. This reflects clarification of pupil growth to be included in the funding formula for the summer 2020 term.

Table 2: Basic Entitlement Rates 2020/21

Basic Entitlement	Thurrock 20/21 - Inflationary increase to BE of 1.01680	Thurrock 20/21 - Inflationary increase to BE of 1.02125
Primary	£2,905.00	£2,917.71
KS 3	£4,085.50	£4,103.38
KS 4	£4,367.62	£4,657.92

- 4.4 The table below shows that the overall quantum to be distributed has remained the same but illustrates the increase in the Basic Entitlement and reduction in minimum per pupil values and minimum funding guarantee.

Table 3: Summary APT 2020/21 distribution

Thurrock	2020/21	2020/21
Inflationary Increase	1.68%	2.125%
	£m	£m
Basic Entitlement	£95.036	£95.313
FSM	£6.398	£6.387
IDACI	£5.658	£5.648
EAL	£1.439	£1.438
Mobility	£0.259	£0.259
Prior Attainment	£8.554	£8.542
Lump Sum	£5.949	£5.853
Premises	£0.791	£0.791
Add funding minimum per pupil level	£1.179	£1.056
MFG	£0.190	£0.160
Schools Block Formula	£125.454	£125.446
Growth/Falling Rolls	£1.385	£1.393
Total Funding for Schools Block Formula	£126.839	£126.839
Transfer to High Needs	£0.635	£0.635
Schools Block Funding Allocation	£127.474	£127.474

- 4.5 Thurrock Cabinet approved the local funding formula on the 12th February 2020.
- 4.6 The ESFA on 17th February 2020 confirmed the authority's adherence to the finance regulations and that the proforma appeared to meet the required criteria.
- 4.7 The final approval has seen some small changes to the information previously presented to the Schools Forum, schools and academies.

4.8 Updated school level information can be found at Appendix B.

5. EARLY YEARS BLOCK

5.1 The early years block comprises of funding for the free early education entitlements for 3 & 4-year-olds and disadvantaged 2-year-olds. The figures are initial allocations as funding is based on the January census.

5.2 The updated funding rates have been reflected in the latest release of information. The final confirmed allocation will not be received until July 2020 to reflect the outcome of the January 2020 census return.

Table 4: Provisional Early Years Block Funding 2020/21

	Numbers	(£ / hr)	£m
3 and 4 year old universal entitlement funding	3,165	£4.54	8.191
3 and 4 year old additional 15 hours entitlement for eligible working parents	836	£4.54	2.164
2 year old entitlement funding	591	£5.74	1.933
Early Years Pupil Premium			0.081
Disability Access Fund			0.044
Total Early Years Block			12.413

5.3 In 2019/20 the updated allocation is an increase of £0.639m. This has been allocated to payment to providers reflecting the increase in early years take up. The projected outturn for 2019/20 is £0.167m, including the £0.123m brought forward from 2018/19.

5.4 Included within the funding announcement is an additional £66 million investment in early years. The ESFA have confirmed that the hourly rate paid to Thurrock will increase by 8p. This is the first increase in the hourly rate that Thurrock has received since 2016/17.

5.5 In addition the use of the carry forward has been considered and the final option is to:

- passport in full the 8p increase in hourly rates to providers;
- increase the hourly rate paid to 3 and 4 year old providers by an additional 2p per hour, with a cost implication of £45,000;
- increase the deprivation quantum and change the formula to be based on the postcode of the child, not the setting. Deprivation funding would increase from £220,000 to £285,000, a cost Implication of £65,000.
- The total cost implication of £110,000 to be funded from the available carried forward allocation of £167,000.

5.6 The rates to be paid to providers from April 2020 will be:

- 2 Year Olds £5.15
- 3 and 4 Year Olds £4.28.

This proposal has been discussed with both the Early Years managers Forum and the Childminders forum.

- 5.7 Finance continue to consider the impact of the January 2020 census and financial implications of the proposed changes. A verbal update will be provided at the meeting.

6. DEDICATED SCHOOLS GRANT BUDGET 2020/21

- 6.1 Officers continue to develop the budget for 2020/21. The High Needs Block represents the highest risk and this is discussed in a separate report elsewhere on this agenda.
- 6.2 Appendix A shows the original budget to be allocated in 2020/21. On finalisation of the 2019/20 outturn position a further review will be undertaken and this will be presented to the June meeting of the Schools Forum.
- 6.3 The projected outturn for 2019/20 is £1.019m which is an increase of £0.278m from that previously reported. The main reason for that change is increased demand within the High Needs Block.

Table 5: DSG Projected Outturn 2019/20

2019/20	Funding Settlement	Academy Recoupment	DSG	Outturn	Variance
	£m	£m	£m	£m	£m
Schools	118.839	(108.561)	10.278	9.569	(0.710)
Central Services	2.073	0.000	2.073	1.974	(0.099)
High Needs	23.848	(5.226)	18.622	20.449	1.827
Early Years	12.332	0.000	12.332	12.166	(0.167)
Total	157.093	(113.787)	43.306	44.157	0.852
Early Years Surplus to be Carried Forward					(0.167)
Revised Outturn position					1.019
Key Areas:					
Schools - Growth Fund		Underspend of £0.710m; currently all known demand up to March 2020 has been included.			
High Needs - EHCP		Overspend of £1.827m; Increase in the number of children and hours supported in mainstream settings.			
Early Years - ESFA		Additional funding received in 2018/19 following increased take up. To be carried forward into 2020/21			

7. PUPIL PREMIUM GRANT

- 7.1 The ESFA have confirmed the Pupil Premium Grant per-pupil rates for 2020 to 2021 are as follows:

Disadvantaged pupils	Pupil premium per pupil
Pupils in year groups reception to year 6 recorded as Ever 6 free school meals (FSM)	£1,345
Pupils in years 7 to 11 recorded as Ever 6 FSM	£955
Looked-after children (LAC) defined in the Children Act 1989 as one who is in the care of, or provided with accommodation by, an English local authority	£2,345
Children who have ceased to be looked after by a local authority in England and Wales because of adoption, a special guardianship order, or child arrangements order (previously known as a residence order)	£2,345
Pupils in year groups reception to year 11 recorded as Ever 6 service child or in receipt of a child pension from the Ministry of Defence	£310

- 7.2 The Virtual School Headteacher is responsible for the use of the Pupil Premium for Children Looked After (CLA). The grant is to be used to improve attainment, narrow the gap and accelerate progress as identified in the young person's Personal Education Plan (PEP) in consultation with the Designated Teacher.
- 7.3 The Headteacher of Thurrock Virtual School is accountable to Thurrock Council's Corporate Parenting Panel and the Governing Body for the Virtual School for setting up a transparent and rigorous allocation process and ensuring maximised impact of the grant.
- 7.4 A total of £1,800 will be allocated per Child Looked After, paid in three instalments. In rare cases, additional funding could be provided according to the needs of the child/young person and this would be up to a maximum of £545.
- 7.5 Children's/Young Person's needs may vary over time and therefore a personalised approach is needed. For some children/young people a significant amount will be needed to fund the cost of support, for example:
- Children who come into care in an emergency with a fragmented home and education history who are behind academically;
 - Children who move into or out of Thurrock who may require additional support;
 - Children with significant and often delayed reaction to abuse and neglect, which may present as complex emotional, social and/or challenging behaviour impacting on progress.

In view of this, there may be variations in the amount of Pupil Premium Plus distributed and as such the Virtual School uses the pool of money from the £545 top slice per pupil for this additional support.

8. HIGH NEEDS BLOCK AND DEFICIT RECOVERY PLAN 2020/21

- 8.1 In June 2019 the LA and Schools Forum agreed a DSG Deficit Recovery plan to return the historic deficit to a balance position by the end of the financial year 2021/22.
- 8.2 On 30th October ESFA feedback was received. A meeting is to be held with the ESFA on 11th March 2020, with representatives from the Funding and Special Educational Needs teams to support Thurrock in developing the recovery plan further.
- 8.3 Increased demand for specialist placements, Education Health and Care Plans and increase in costs in 2019/20 and 2020/21 makes the existing plan to return to a balance position by March 2022 as unachievable.
- 8.4 The ESFA, with the increase in High Needs funding, expect that the need to transfer funding from the Schools Block to the High Needs Block will not be required.
- 8.5 The DSG deficit position is forecasted to be £2.428m at the end of 2019/20. In 2020/21 the focus has been on setting a balanced budget, with no plans in place to reduce the deficit.

DSG Deficit	£m
Historic Deficit 2018/19	(2.657)
DSG 2019/20 - SB Contribution	1.248
DSG Deficit Plan	(1.409)
DSG Projected Deficit 2019/20	(1.019)
DSG Projected Deficit as at 31st March 2020	(2.428)

- 8.6 Feedback will be provided at the meeting of the outcome of discussions with the ESFA.

9. REFERENCES TO OTHER KEY DOCUMENTS / PREVIOUS REPORTS

- School Forum meeting 16th January 2020 – Dedicated Schools Grant 2020/21
- Thurrock Cabinet Report 15th January 2020 – Schools Funding Formula 2019/20
- School Forum meeting 21st November 2019 – Dedicated Schools Grant 2019/20 and 2020/21

10. CONTACT DETAILS OF LEAD OFFICER / AUTHOR

If you have any queries or comments in advance of the Schools Forum meeting about this report, please contact

Name: David May
Role: Strategic Finance Lead DSG and Schools
E-Mail: dmay@thurrock.gov.uk
Phone: 01375 652092

Appendix A

<u>Dedicated Schools Grant 2019/20 and 2020/21</u>		<u>2019/20</u>	<u>2019/20</u>	<u>2020/21</u>
		Budget	Outturn	Budget
		£m	£m	£m
	Schools Block	118.839	118.130	126.839
	Central Services Block	2.073	1.974	1.847
	High Needs Block	23.847	25.675	26.102
	Early Years Block	12.332	12.165	12.413
<u>Dedicated Schools Grant</u>		<u>157.092</u>	<u>157.944</u>	<u>167.201</u>
SB	Maintained Schools Budgets	115.843	115.843	125.454
SB	School Licences	0.122	0.122	0.126
SB	Growth Fund	1.627	0.917	1.259
SB	Deficit Recovery	1.248	1.248	0.000
CSSB	Statutory and Regulatory duties - Education	0.352	0.352	0.376
CSSB	Statutory and Regulatory duties - Finance	0.140	0.082	0.140
CSSB	School Place planning	0.053	0.053	0.029
CSSB	Admissions	0.230	0.187	0.260
CSSB	Schools Forum	0.010	0.012	0.010
CSSB	SACRE	0.010	0.010	0.010
CSSB	Contribution to Combined budgets	1.278	1.278	1.022
HNB	Place Funding	0.108	0.139	0.397
HNB	Place Funding Academies to be recouped	5.226	5.226	5.334
HNB	Top Up Funding - Thurrock Academies	1.667	2.785	2.848
HNB	Top Up Funding - Thurrock Resource Provisions	2.272	2.264	2.642
HNB	Top Up Funding - Thurrock Special Schools	3.614	3.851	4.156
HNB	Top Up Funding - Thurrock Alternative Provision	1.258	1.268	1.445
HNB	Top Up Funding - Other Local Authorities (4-16)	1.011	1.043	1.043
HNB	Top Up Funding - Post 16	1.166	1.719	1.787
HNB	Pupils not in School	0.000	0.365	0.161
HNB	Residential - Non Maintained and Independent	1.500	1.374	1.100
HNB	Non Residential - Non Maintained and Independent	1.800	1.379	1.100
HNB	Commissioned Services	1.158	1.230	1.100
HNB	Additional High Needs Targeted	0.200	0.331	0.200
HNB	Travellers Team	0.051	0.042	0.052
HNB	Home to School Transport	1.787	1.787	1.787
HNB	High Needs Central Team	1.030	0.872	0.950
EYB	3&4 Year old	9.899	9.800	10.040
EYB	2 year olds	1.861	1.835	1.836
EYB	Early Years Central Team	0.572	0.530	0.537
<u>Dedicated Schools Grant</u>		<u>157.092</u>	<u>157.944</u>	<u>167.201</u>

URN	LAESTAB	School Name	NOR 2019/20	NOR 2020/21	Change	Schools Budget 2019/20	Rates 2019/20	School Budget 2019/20 Excluding Rates	Schools Budget 2020/21	Total Rates 2020/21	School Budget 2020/21 Excluding Rates	Change from 2019/20 to 2020/21	Per Pupil Value 2019/20	Per Pupil Value 2020/21	% Change	Notional SEN Budget 2020/21
Total			27,031	27,739	708	£115,842,940	£762,119	£115,080,821	£125,446,407	£791,079	£124,655,328	£9,574,506				£17,881,394
115239	8834733	Grays Convent High School	617.00	645.00	28.00	3,122,210.01	9,331.66	3,112,878.35	3,431,042.03	8,294.00	3,422,748.03	309,869.68	£5,045.18	£5,306.59	5.18%	£397,951.02
137549	8834394	Harris Academy Chafford Hundred	946.00	989.00	43.00	4,588,514.50	47,714.50	4,540,800.00	4,999,152.00	54,152.00	4,945,000.00	404,200.00	£4,800.00	£5,000.00	4.17%	£569,003.04
147537	8834003	Harris Academy Ockendon	1,145.50	1,168.50	23.00	5,872,740.42	35,394.19	5,837,346.23	6,342,276.54	37,632.00	6,304,644.54	467,298.32	£5,095.89	£5,395.50	5.88%	£924,300.93
144750	8834002	Harris Academy Riverside	358.00	549.00	191.00	1,779,496.86	5,000.00	1,774,496.86	2,940,453.99	31,232.00	2,909,221.99	1,134,725.13	£4,956.70	£5,299.13	6.91%	£351,682.87
135960	8836906	Ormiston Park Academy	617.00	635.00	18.00	3,414,449.27	26,214.18	3,388,235.09	3,709,160.85	28,207.00	3,680,953.85	292,718.76	£5,491.47	£5,796.78	5.56%	£610,559.00
136854	8835439	Ortu Gable Hall School	1,300.00	1,279.00	(21.00)	6,297,018.86	42,175.00	6,254,843.86	6,650,108.44	41,728.00	6,608,380.44	353,536.57	£4,811.42	£5,166.83	7.39%	£855,510.85
143424	8834001	Ortu Hassenbrook Academy	484.00	515.00	31.00	2,641,497.44	16,612.44	2,624,885.00	2,980,696.62	8,222.00	2,972,474.62	347,589.62	£5,423.32	£5,771.80	6.43%	£476,138.10
137456	8835440	St Clere's School	1,314.50	1,333.50	19.00	6,455,013.98	30,821.00	6,424,192.98	6,927,601.14	34,922.00	6,892,679.14	468,486.15	£4,887.18	£5,168.86	5.76%	£935,190.38
133114	8836905	The Gateway Academy	1,027.00	1,048.00	21.00	5,671,153.32	68,161.41	5,602,991.91	6,270,259.24	78,582.00	6,191,677.24	588,685.32	£5,455.69	£5,908.09	8.29%	£1,155,165.08
139578	8834000	The Hathaway Academy	826.00	873.00	47.00	4,374,508.18	18,227.94	4,356,280.24	4,965,332.00	18,842.00	4,946,490.00	590,209.76	£5,273.95	£5,666.08	7.44%	£749,485.40
137214	8835438	William Edwards School	1,254.00	1,268.00	14.00	6,052,093.00	32,893.00	6,019,200.00	6,372,512.00	32,512.00	6,340,000.00	320,800.00	£4,800.00	£5,000.00	4.17%	£742,638.80
883998	8839998	Orsett Heath Academy	0.00	70.00	70.00	0.00	0.00	0.00	417,691.70	0.00	417,691.70	417,691.70		£5,967.02		£51,443.19
883999	8839999	Thames Park Secondary School	0.00	70.00	70.00	0.00	0.00	0.00	417,691.70	0.00	417,691.70	417,691.70		£5,967.02		£51,443.19

THURROCK SCHOOLS FORUM REPORT

DATE: 12 March 2020
SUBJECT: High Needs Block 2020/21
REPORT OF: Malcolm Taylor / David May
THE REPORT IS: For Decision

1. EXECUTIVE SUMMARY

1.1 This report provides information for School Forum members in relation to:

- DSG High Needs Block funding for 2020/21;
- Thurrock High Needs Block context;
- Commissioning arrangements for high need places in specialist provisions from September 2020;
- Band Values proposed to be implemented from September 2020;
- Outreach Services 2020/21;
- Feedback from Headteachers Briefing January 2020;
- Head Needs Block Strategy
- High Needs Budget 2020/21 and associated risks.

1.2 The report has also been circulated to ESFA to provide context to support discussions to be held on the 11th March to discuss DSG recovery plan.

2. RECOMMENDATIONS

2.1 School Forum members are asked to:

- (i) Consider and comment on the information provided in the report.
- (ii) Agree revisions to the band values to be implemented from September 2020 that reflect discussion held with providers.
- (iii) Agree to receive a future update report on the implementation of Service Partnership Agreements.

3. HIGH NEEDS BLOCK 2020/21

- 3.1 Thurrock's High Needs Block funding allocation for 2020/21 is £25.464m, an increase from the 2019/20 allocation of £2.211m or 9.51%. The value of the increase nationally was a minimum increase of 8% with a maximum value set at 17%.
- 3.2 The table below includes the proposed transfers from other funding blocks that increases the budget available to £26.122m.

Table 1: High Needs Block Funding Change

High Needs Block	2020/21 £m
National Funding Formula 2020/21	24.222
Import / Export Adjustments	(0.444)
	23.778
Basic Entitlement (390Pupils @ £4,183.21)	1.631
Additional funding Special Free School	0.054
Funding Settlement 2020/21	25.464
Transfer from Schools Block	0.635
Transfer from Central School Services Block	0.023
High Needs Block Budget 2020/21	26.122

4. THURROCK CONTEXT

- 4.1 In Thurrock (Autumn 2019), out of a school population of 29,680; 4,333 (14.6%) children and young people were identified as having special educational needs, 3,134(10.6%) were SEN Support and 1,199 (4%) had an Education Health and Care Plan.
- 4.2 In 2019 240 new plans were completed, 182 were completed (76%) within the 20 weeks statutory timescale.

Table 2: New Plans Completed in 2019

Age at 31/8/19	Number
Under age 5	68
Aged 5 to 10	125
Aged 11 to 15	43
Aged 16 to 19	4
Aged 20 to 25	0

- 4.3 The number of EHC Plans that were discontinued as pupils left full time education was 101, while 318 new requests for assessments for an EHC plan were made and of these new requests that went to assessment it was decided not to issue an EHC plan to 93 pupils.
- 4.4 The draft SEN2 return states that Thurrock currently maintains 1,661 plans across the 0-25 age range.

Table 3: Draft SEN2 Return – January 2020 census

Age at 31/8/19	Number
Under age 5	72
Aged 5 to 10	617
Aged 11 to 15	582
Aged 16 to 19	303
Aged 20 to 25	87
TOTAL	1,661

- 4.5 Within the SEN2 return, 903 (54%) pupils with plans attend mainstream schools, 420 (25%) pupils attend special schools or specialist post 16 provision, 13 CYP with EHCP are educated in residential special schools or colleges, two of these are 52 weeks per year establishments.
- 4.6 The most common category of need for Thurrock pupils at SEN School Support is 'moderate learning difficulties' (MLD); and the most common category of need for pupils with a statutory SEN plan is Autistic Spectrum Disorder (ASD) This mirrors the national picture.
- 4.7 Around a third (32%) of all children and young people identified with SEN and 5.0% of ALL pupils in Thurrock schools are identified as having MLD. This is higher than our Eastern Region (22.3%), Statistical Neighbour (20.8%) and national (22.2%) comparators. (2018 data latest stat neighbours data available).
- 4.8 Whilst the total percentage of Thurrock pupils identified as having SEN is close to the national figure, it is slightly lower than statistical neighbours (15.31%) and slightly higher than the East Region average (13.9%); the split between non-statutory (SEN School Support) and EHC plans indicates that we have comparatively more pupils with EHC plans.
- 4.9 The rate of completion of statutory assessments in 20 weeks has improved significantly in 2019. The implementation of robust monitoring arrangements, improvements to IT systems and multi-agency working has seen an increase from 14% 2017 to 76% at the end 2019.
- 4.10 Currently there are no plans out of timescale and the rate of completion of statutory assessments for 2020 in 20 weeks is 80% and is likely to be 90% by the time of the meeting.

- 4.11 The table below combines the October Pupil Count with the SEN2 information for the past 4 years and outlines the significant increase in EHCPs from 2018/19 that continues into 2019/20.

Table 4: Increase in EHCP compared to Thurrock Pupil Numbers.

Age at 31st August	2017	2018	2019	2020
Aged 5 to 10	470	482	548	617
Aged 11 to 15	458	474	521	582
Total	928	956	1,069	1,199
Annual Increase		3%	12%	12%

October Census Pupil Numbers	2016	2017	2018	2019
Primary	16,505	16,964	17,035	17,195
Secondary	8,899	9,201	9,748	10,172
Total	25,404	26,165	26,783	27,367
Annual Increase		3%	2%	2%

5. COMMISSIONING ARRANGEMENTS 2020/21 ACADEMIC YEAR

- 5.1 The agreed 2020/21 commissioned numbers was submitted to the ESFA in November 2019.
- 5.2 Discussions have been ongoing with each specialist provision on the place value and the development of a service level agreement unique to each provision. The challenge has been on ensuring the place value enables the provision to recovery its costs against securing value for money within a challenging budget position.
- 5.3 In 2019/20 the local authority commissioned 580 pupils in specialist provisions. In 2020/21 the commissioned numbers will increase to 657; this is an increase of 77 from original 2019/20 submission.
- 5.4 The increase for 2020/21 can be broken down into 5 key areas:
- Expansion of the Inclusion base at East Tilbury and the Resource base at Quarry Hill by a combined 14 additional places.

This reflects our strategic priority of creating more local provision to meet the needs of our children. In place, within the primary sector are 2 resource bases for SEMH (Quarry Hill and Dilkes), with 20 places and 2 inclusion units (East Tilbury and Thameside), with 16 places.

The inclusion units are turnaround places and the expectation is that the pupil will attend for 2 terms and be reintegrated back into mainstream setting;

- Increase by 10, from 20 to 30 places for Social Emotional Mental Health at Ormiston Park, this is based on assessed need with a phased implementation from January 2020;
- Increase by 11 places to 85 at Olive Alternative Provision, reflecting current demand for places in 2019/20.
- Proposed establishment of a new 20 place secondary Social Emotional Mental Health provision from September 2020.
- Establishment of additional provision at Treetops of 16 places, equally split between the two new bases for Verbal Behaviour (VB) and Moderate Learning Disabilities (MLD). This will prevent these places being commissioned from providers outside of Thurrock at higher costs.

5.5 The table below shows the commissioning intention at each specialist provision for 2019/20 and 2020/21:

Table 2: High Needs Block Commissioned places 2020/21

Institution Name	Total	Total	Total
	2019/20 ESFA Places	2019/20 Updated Places	2020/21 ESFA Places
LANSDOWNE PRIMARY ACADEMY	8	8	8
STANFORD-LE-HOPE PRIMARY SCHOOL	5	5	5
ORTU CORRINGHAM PRIMARY SCHOOL	20	20	20
DILKES ACADEMY	10	10	10
HARRIS ACADEMY CHAFFORD HUNDRED	20	20	20
ST CLERE'S SCHOOL	17	17	17
ORMISTON PARK ACADEMY	20	20	30
EAST TILBURY PRIMARY SCHOOL	6	10	10
THAMESIDE PRIMARY SCHOOL	6	6	6
QUARRY HILL	0	6	10
OLIVE AP ACADEMY - THURROCK	74	74	85
TREETOPS SCHOOL	293	309	309
BEACON HILL ACADEMY	75	75	75
ACADEMY	554	580	605
WARREN PRIMARY	18	18	18
CHAFFORD HUNDRED PRIMARY	5	5	3
STANFORD-LE-HOPE SCHOOL	3	3	3
INCREASE TO SPECIAL PROVISION			8
NEW SECONDARY SEMH PROVISION			20
THURROCK	580	606	657

6. HIGH NEEDS BAND VALUES 2020/21 ACADEMIC YEAR

- 6.1 In 2019/20 the schools forum approved the reduction of band values by 1.5%. This decision was made as a means by which to control expenditure within the High Needs Block. Providers accepted the decision for 1 year only with the understanding that band values would be reviewed as part of the 2020/21 commissioning process.
- 6.2 The key principle is that all providers will be fully funded for agreed staffing ratios and support. It is not expected that within the resource provisions that the mainstream School would subsidise the cost.
- 6.3 During 2019/20 Officers have discussed with each specialist provision; their associated costs and staffing ratios, options available and the band values required to ensure the provision can provide an agreed standard of provision as outlined in the Service Level agreement.
- 6.4 The table below shows the Band Values for 2019/20 and proposed Band Values for 2020/21:

Table 3: High Needs Block Band Values 2020/21

Band Descriptor	Place Funding	AWPU	Top Up Funding	Band Value 2019/20	Place Funding	AWPU	Top Up Funding	Band Value 2020/21
Special Band 1	£10,000	£0	£1,458	£11,458	£10,000	£0	£2,000	£12,000
Special Band 2	£10,000	£0	£3,211	£13,211	£10,000	£0	£3,500	£13,500
Special Band 3	£10,000	£0	£18,311	£28,311	£10,000	£0	£22,000	£32,000
Special Band 4	£10,000	£0	£18,538	£28,538				
Special Band 5	£10,000	£0	£22,700	£32,700				
AP Band 1	£10,000	£0	£17,000	£27,000	£10,000	£0	£17,000	£27,000
Mainstream - Primary Band 1	£6,000	£2,947	£5,978	£14,925	£6,000	£3,750	£4,250	£14,000
Mainstream - Primary Band 2	£6,000	£2,947	£8,564	£17,511	£6,000	£3,750	£8,500	£18,250
Mainstream - Primary Band 3	£6,000	£2,947	£15,336	£24,283	£6,000	£3,750	£15,250	£25,000
Mainstream - Primary Band 4	£6,000	£2,947	£16,053	£25,000	£6,000	£3,750	£18,750	£28,500
Mainstream - Primary Band 5	£6,000	£2,947	£18,053	£27,000	£6,000	£3,750	£20,250	£30,000
Mainstream - Secondary Band 1	£6,000	£4,415	£4,510	£14,925	£6,000	£5,000	£3,000	£14,000
Mainstream - Secondary Band 2	£6,000	£4,415	£7,096	£17,511	£6,000	£5,000	£7,250	£18,250
Mainstream - Secondary Band 3	£6,000	£4,415	£13,868	£24,283	£6,000	£5,000	£14,000	£25,000
Mainstream - Secondary Band 4	£6,000	£4,415	£14,585	£25,000	£6,000	£5,000	£17,000	£28,000
Mainstream - Secondary Band 5					£6,000	£5,000	£19,000	£30,000
Mainstream - Secondary Band 6					£6,000	£5,000	£25,000	£36,000
Mainstream - Secondary Band 7					£6,000	£5,000	£29,000	£40,000
Mainstream - Nursery	£0.00	£0	£17,000	£17,000	£0.00	£0	£32,000	£32,000

- 6.5 The increase in costs reflects the small bases that have been established specifically in the primary sector. Whilst the provisions continue to offer value for money to Thurrock, when compared to alternatives, the next stage would be to consider if the size of some of the basis could be increased to allow the band value to reduce as economies of scale are achieved.

7. HIGH NEEDS BLOCK PARTNERSHIP AGREEMENTS

- 7.1 A bespoke draft agreement has been discussed with each of Thurrock's specialist provisions. Over the coming weeks these will be finalised with individual performance framework agreed.

8. HIGH NEEDS BLOCK OUTREACH BUDGET 2020/21

- 8.1 A review of the High Needs Block Outreach services and costs have been undertaken. The table below shows the Outreach provision and cost that is available within Thurrock.

Table 4: High Needs Block Outreach 2020/21

Academy/Service		2020/21
Osbourne Trust	HI / VI	£340,000
Treetops	Portage	£240,000
Treetops	Outreach	£300,000
Beacon Hill	Outreach	£180,000
School Wellbeing Service		£50,000
Total		£1,110,000

- 8.2 These services as part of the development of the partnerships agreements have been reviewed to ensure they meet identified need within Thurrock and support the inclusion agenda.

9. OUT OF AREA PLACEMENTS

- 9.1 The Local Authority continues to look to place pupils seeking specialist placements in local provision in the first instance and only place in Independent or non-maintained schools where there is no other local option available that could meet the needs of these pupils.

- 9.2 Schools Forum needs to be aware that of the current commissioned places a small number of places are currently taken up by pupils from other local authorities; however, we have 81 pupils currently placed in schools in neighbouring local authorities.

- 9.3 As a local area we have 42 pupils in independent specialist schools, and 4 pupils in non-maintained specialist settings.

10. HEAD TEACHERS BRIEFING 29TH JANUARY 2020

- 10.1 In order to make all schools aware and seek innovative solutions to the issues faced in the High Needs Block, Head Teachers agreed that this would be a key discussion item on 29th January 2020.
- 10.2 At the meeting presentations were made outlining the key issues both in terms of continued increase in Education, Health and Care Plans and the implication on the Dedicated Schools Grant and particularly the High Needs Block.
- 10.3 The following question was asked:
“Please consider how we can build parental confidence and ensure that pupil’s needs are appropriately met at SEN support. Consequently reducing the level of need for Education, Health and Care Plans.”
- 10.4 A summary of the points raised are shown below:
- Would the development of an Early Help offer support the system and lead to a reduction in the number of EHCP’s;
 - Increased parental understanding of system and process. Clarification and promotion of what parents should expect from all schools without the requirement of an EHCP;
 - Identify training needs within schools to support inclusion;
 - Greater focus required on the Notional SEN amount of each school and how schools are using this to meet need;
 - Consistency of the EHCP process.
- 10.5 These points will be discussed with the ESFA on Wednesday 11th March and consider what other Local Authorities have implemented to reduce demand in the system. An action plan will be developed and discussed at a future meeting.

11. HIGH NEEDS BLOCK STRATEGY

- 11.1 Thurrock recognises that the development of our high needs strategy is multi-agency and reliant upon a range of partners including our schools, parents/careers, young people, health and social care.
- 11.2 The large majority of our schools are either part of multi academy trusts or stand-alone academies which means our partnership approach is critical in the development of our longer term strategy.
- 11.3 Work has been undertaken to develop our strategic principles and we are in the process of reviewing and updating these. The development of local provision is a key priority and we have commissioned a number of local educational pathway opportunities through all key phases. This will only be achieved if we have clearly articulated our shared vision to provide outstanding local provision to meet the needs of our SEND learners.

- 11.4 Thurrock School Effectiveness and SEND have applied to become a hub for the Autism Education Trust (AET). This is a DfE supported programme that is designed to raise autism awareness and improve practice for mainstream early years' settings, schools and post 16 institutions.
- 11.5 The AET will assist us to reduce the demand for and costs of specialist autism services by helping the Council to support schools to meet the needs of autistic children and young people.
- 11.6 Over the coming months a range of sessions will be held with Headteachers, Governors, Parents and Carers, SENCOs and School Business managers to clarify the SEN system and the expectation and requirements at each stage of the process.

12. HIGH NEEDS BLOCK BUDGET 2020/21

- 12.1 In order to set a balance budget the following key risks needs to be acknowledged and closely monitored throughout the year:
- Top Up Funding - Thurrock Schools & Academies - Budget to equal the 2019/20 forecasted outturn. Potential financial Risk £350,000;
 - Top Up Funding - Other Local Authorities (4-16) - Budget to equal the 2019/20 forecasted outturn. Potential financial Risk £60,000;
 - Top Up Funding - Post 16 – Small increase to the 2019/20 forecasted outturn. Potential financial Risk £170,000;
 - Pupils not in School - A 56% decrease in cost compared to 2019/20 forecasted outturn. Potential financial Risk £60,000;
 - Residential - Non Maintained and Independent - A 20% decrease in cost compared to 2019/20 forecasted outturn to reflect increase in local offer. Potential financial Risk £300,000;
 - Non Residential - Non Maintained and Independent - A 20% decrease in cost compared to 2019/20 forecasted outturn to reflect increase in local offer. Potential financial Risk £300,000;
 - Additional High Needs Targeted - A 40% decrease in cost compared to 2019/20 forecasted outturn. Potential financial Risk £100,000;
 - Total Potential Financial Risk £1,340,000.

12.2 The table below shows the High Needs Budget for 2020/21. The commissioned numbers and increase to band values have been included.

Table 5: High Needs Block Budget 2020/21

High Needs Block	2019/20 Budget £m	2019/20 Outturn £m	2020/21 Budget £m
High Needs Block	23.642	23.642	25.854
Import / export adjustments	(0.444)	(0.444)	(0.444)
HNB Free School Adjustment	0.054	0.054	0.054
	23.252	23.252	25.464
Schools Block transfer	0.595	0.595	0.635
Transfer from Central Services Schools Block	0.000	0.000	0.003
Funding Settlement	23.847	23.847	26.102
Place Funding	0.108	0.139	0.397
Place Funding Academies to be recouped	5.226	5.226	5.334
Top Up Funding - Thurrock Schools & Academies	1.667	2.785	2.848
Top Up Funding - Thurrock Resource Provisions	2.272	2.264	2.642
Top Up Funding - Thurrock Special Schools	3.614	3.851	4.156
Top Up Funding - Thurrock Alternative Provision	1.258	1.268	1.445
Top Up Funding - Other Local Authorities (4-16)	1.011	1.043	1.043
Top Up Funding - Post 16	1.166	1.719	1.787
Pupils not in School	0.000	0.365	0.161
Residential - Non Maintained and Independent	1.500	1.374	1.100
Non Residential - Non Maintained and Independent	1.800	1.379	1.100
Commissioned Services	1.158	1.230	1.100
Additional High Needs Targeted	0.200	0.331	0.200
Travellers Team	0.051	0.042	0.052
Home to School Transport	1.787	1.787	1.787
High Needs Central Team	1.030	0.872	0.950
High Needs Block Budget / Projected Outturn	23.847	25.675	26.102
Surplus / Deficit	0.000	1.828	0.000

13. SPECIAL FREE SCHOOLS

- 13.1 From 2019/20 onwards, funding for special free school places will be included in local authorities' high needs allocations. Funding for these places will be deducted from local authorities' high needs allocations by ESFA, and paid directly to schools, as for special academies. The EFSA will use the basic entitlement factor, the import/export adjustment and further adjustments in the National Funding Formula to ensure that this change will not result in an unfunded cost for local authorities. Local authorities with a special free school will receive £10,000 for every place at the free school through the formula adjustments mentioned above¹.
- 13.2 The guidance above will apply to Treetops Free School on opening in 2021/22.

14. NEXT STEPS

- 14.1 Officers will continue to scrutinise costs and budgets and reports will be made to each future meeting of the Schools Forum and Headteacher briefings.
- 14.2 All Thurrock specialist settings will be provided with an individual budget for both the financial year and academic year 2020/21 by the 31st March 2020.
- 14.3 Officers will continue to work with all settings to implement the new partnership agreement.

15. REFERENCES TO PREVIOUS REPORTS

- 15.1 Schools Forum 16th January 2020 – Dedicated Schools Grant 2020/21
- 15.2 Schools Forum 21st November 2019 – High Needs Block – Commissioning Intentions and Service Partnership Agreement for School Resource Provision

16. CONTACT DETAILS OF LEAD OFFICER / AUTHOR

If you have any queries or comments in advance of the Schools Forum meeting about this report, please contact either:

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THURROCK SCHOOLS FORUM REPORT

DATE:	12 March 2020
SUBJECT:	Funding arrangements for permanent exclusions 2020/21
REPORT OF:	Michele Lucas / David May
THE REPORT IS:	For Decision

1. EXECUTIVE SUMMARY

- 1.1 The purpose of this report is to seek agreement from Schools Forum to update the charges/allocations for pupils permanently excluded from mainstream schools in 2020/21.
- 1.2 To provide details of the financial contribution we will seek from schools to support children and young people who have been permanently excluded.
- 1.3 To work on the principal of funding following the child or young person

2. RECOMMENDATIONS

- 2.1 Schools' Forum members are asked to approve the update to the charges/allocations for all mainstream schools and use this mechanism to form an agreement with all academies.

The individual school level values for 2019/20 and 2020/21 are shown at Appendix 2.

Adjustment made to a school's budget under a financial adjustment order to increase in line with the minimum per pupil values within the 2020/21 funding formula.

- In 2019/20 this is £3,500 for Primary pupils and £4,800 for Secondary pupils.
- In 2020/21 this is £3,750 for Primary pupils and £5,000 for Secondary pupils.

- 2.2 That Schools Forum accepts the following changes to be applied from April 2020 for the changing/allocation mechanism for permanent school exclusions:

3. PURPOSE OF THE REPORT

- 3.1 To seek agreement from Schools Forum to alter the charges/allocations for pupils permanently excluded from mainstream schools and academies.

4. BACKGROUND

- 4.1 The increase in the number of exclusions is placing additional pressures on the High Needs Block, which is unsustainable. The main principal, of the schools funding formula, is that the funding follows the child.
- 4.2 The table below details the number of permanent exclusions by academic year since 2014/15:

	2014-15	2015-16	2016-17	2017-18	2018/19	2019/20 to date
Primary	6	7	7	17	9	2
Secondary	19	27	15	27	35	20
Total	25	34	22	44	44	22

- 4.3 The LA buys places for excluded pupils upfront from Alternative Providers or Specialist Resource bases to ensure that permanently excluded pupils have access to education (6 day provision). There is a finite amount of DSG budget that can be used to do this with and if the number of places is exceeded then additional budget will need to be found to spot purchase additional places.
- 4.4 The agreement introduced in September 2019, recognises the higher cost of educating a pupil at the PRU or of providing extra support to re-integrate into another mainstream school at a later date, and act as a financial deterrent to exclusion.

5. MAINSTREAM SCHOOLS EXCLUSION CHARGES

- 5.1 The methodology for the calculation of exclusion charges for mainstream pupils is set out within the School Finance Regulations.
- 5.2 The purpose of the charge is to provide a contribution to the cost of alternative school provision as part of the arrangements for pupils educated out of school and if the pupil is admitted to another mainstream school within the funding period, the admitting school's will receive the budget share in accordance with the complete weeks remaining in the funding period during which the pupil is a pupil at the admitting school
- 5.3 The School and Early Years Finance (England) Regulations 2018 states that, where a child is permanently excluded, the Local Authority must re-determine an excluding school's budget share. All references within the Regulations regarding the amount to reduce by, refer to the 'funding period' and not the financial year. The regulations do not provide specific dates for the funding period and schools and the local Authority need to agree this period.
- 5.4 Schools will be aware that the funding formula is calculated according to lagged pupil numbers and data (from the preceding October school census). Therefore, if a pupil is excluded before the October census date, a maintained school will receive no further formula funding for the pupil beyond the end of the current financial year and an in the case of an academy they will receive no funding beyond the end of the current academic year. However, for a pupil excluded after the census date the school will receive funding for the whole of the following financial year. The exclusion charges, therefore, include funding for the relevant period of both years (the funding period).

6. CURRENT METHOD USED IN THURROCK

- 6.1 The excluding school’s budget share will be reduced by the minimum per pupil rate at individual school level calculated using the post MFG budget (Appendix 2), plus any pupil premium attributable to the pupil.
- 6.2 Within the regulations there is the opportunity for schools and academies to come to a local agreement of an additional payment that can be applied to an exclusion claw back according to DfE guidance. The charge applied in 2019/20 reflects the minimum per pupil value applied through the schools funding formula, £3,500 for Primary and £4,800 for Secondary pupils. This agreement recognises the higher cost of educating a pupil at the PRU or of providing extra support to re-integrate into another mainstream school at a later date, and act as a financial deterrent to exclusion.

7. FINANCIAL IMPACT

- 7.1 From implementation in September 2019, the funding period is the same for Maintained schools and Academies for the period September 2019 to March 2020.
- 7.2 However, for the financial year 2020/21, a maintained school funding period is for the financial year and the implementation of the 2020/21 funding formula occurs from April 2020. An Academies funding period is for the academic year, with the 2020/21 formula to be implemented from September 2020.
- 7.3 The table below illustrates how the system will work for the financial year 2020/21, and which Funding Formula (FF) will apply and when.

	<u>Summer 20</u>	<u>Autumn 20</u>	<u>Spring 21</u>
Maintained School	FF 2020/21	FF 2020/21	FF 2020/21
Academy	FF 2019/20	FF 2020/21	FF 2020/21

- 7.4 At the date of the permanent exclusion the financial information available will be used to determine the funding to be withdrawn or provided. No retrospective adjustment will be made.
- 7.5 The charge to be calculated will be the full funding period i.e. for the remainder of the current financial year and the whole of the next financial year if the exclusion is after the October census and the pupil is not in year 11.
- 7.6 In a small number of cases, a school will agree to admit a pupil outside of the October census date, in these cases an individual discussion will be held on the funding to be withdrawn unique to the individual circumstances surrounding the child.

8. REFERENCES TO OTHER KEY DOCUMENTS / PREVIOUS REPORTS

8.1 Schools Forum Report 26th September 2019.

9. CONTACT DETAILS OF LEAD OFFICER / AUTHOR

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Charges to schools – excluded pupils

For excluded pupils, the charges will be as per The Schools and Early Years Finance (England) Regulations.

This means that when a pupil is permanently excluded, the authority will re-determine the excluding school's budget share.

The excluding school's budget share will be reduced by

$$A + B \times (C/52)$$

A is the amount determined by the authority as attributable to a pupil with the same characteristics.

This has been determined as the minimum per pupil rate at individual school level calculated using the post MFG budget plus any pupil premium attributable to the pupil.

The individual school level values for 2019/20 and 2020/21 are shown at Appendix 2. These will be updated annually following approval of the Thurrock Schools Funding Formula.

B is the adjustment made to a school's budget under a financial adjustment order.

In 2019/20 this is £3,500 for Primary pupils and £4,800 for Secondary pupils following an order from a review panel.

In 2020/21 this is £3,750 for Primary pupils and £5,000 for Secondary pupils following an order from a review panel.

C is either

- (i) the number of complete weeks remaining in the funding period calculated from the relevant date; or
- (ii) where the permanent exclusion takes effect on or after 1st April in a school year at the end of which pupils of the same age, or age group, as the pupil in question normally leave that school before being admitted to another school with a different pupil age range, the number of complete weeks remaining in that school year calculated from the relevant date;

When a pupil who has been permanently excluded from the excluding school and is admitted to another school, the authority will re-determine the admitting school's budget share. This will be increased by:

$$D \times (E/F)$$

D is the amount by which the authority reduced the budget share of the excluding school, except that any reduction following a financial adjustment order is not taken into account.

E is the number of complete weeks remaining in the funding period during which the pupil is a pupil at the admitting school.

F is the number of complete weeks remaining in the funding period calculated from the relevant date.

Where a permanently excluded pupil is subsequently reinstated by the governing body of the school, the school's budget share will be increased by an amount which is no less than

$$G \times (H / I)$$

G is the amount by which the authority reduced the school's budget share

H is the number of complete weeks remaining in the funding period during which the pupil is reinstated; and

I is the number of complete weeks remaining in the funding period calculated from the relevant date.

For the purposes of this document, the relevant date is the sixth school day following the start date of the permanent exclusion. If required and the exclusion is subsequently withdrawn or overturned the necessary adjustments will be made.

Process

On a monthly basis the Inclusion and Access Officer will extract from the Capita One system details of any permanent exclusions.

The minimum per pupil rate at individual school level, shown at Appendix B and C plus any pupil premium attributable to the pupil will be used to calculate the budget adjustment applicable.

The Inclusion and Access Officer will also produce a statement per school that will be provided when the budget adjustments/invoices are processed.

Funding Formula 2019/20 and 2020/21 - Individual School Level Values

Appendix 2

LAESTAB	Phase	School Name	Per Pupil Value 2019/20	Per Pupil Value 2020/21
8833822	Primary	Abbots Hall Primary School	£3,985.14	£4,013.21
8832439	Primary	Arthur Bugler Primary School	£3,681.07	£3,750.00
8832014	Primary	Aveley Primary School	£3,886.29	£4,078.09
8832542	Primary	Belmont Castle Academy	£3,668.58	£3,878.07
8832003	Primary	Benyon Primary School	£4,245.93	£4,351.13
8832722	Primary	Bonnygate Primary School	£3,921.43	£4,029.42
8832013	Primary	Bulphan Church of England Academy	£5,014.42	£5,045.49
8832011	Primary	Chadwell St Mary Primary School	£4,655.27	£4,736.14
8832462	Primary	Deneholm Primary School	£3,688.99	£3,765.10
8832622	Primary	Dilkes Academy	£3,725.66	£3,945.23
8832824	Primary	East Tilbury Primary School	£3,773.81	£3,834.34
8832942	Primary	Giffards Primary School	£3,729.29	£3,813.89
8832137	Primary	Graham James Primary Academy	£3,724.29	£3,789.11
8832987	Primary	Harris Primary Academy Chafford Hundred	£3,500.00	£3,750.00
8832008	Primary	Harris Primary Academy Mayflower	£3,631.31	£3,750.00
8832644	Primary	Herringham Primary Academy	£3,997.56	£4,149.34
8833605	Primary	Holy Cross Catholic Primary School	£4,043.46	£4,226.95
8835281	Primary	Horndon-On-the-Hill CofE Primary School	£3,941.53	£4,018.39
8835266	Primary	Kenningtons Primary Academy	£3,775.63	£3,890.57
8832000	Primary	Lansdowne Primary Academy	£4,078.89	£4,393.78
8832015	Primary	Little Thurrock Primary School	£3,538.19	£3,750.00
8833502	Primary	Orsett Church of England Primary School	£3,876.56	£3,917.15
8832006	Primary	Ortu Corringham Primary School	£3,673.62	£3,750.00
8832002	Primary	Purfleet Primary Academy	£3,898.85	£4,019.68
8832005	Primary	Quarry Hill Academy	£3,801.68	£4,092.98
8832985	Primary	Shaw Primary Academy	£3,981.48	£4,128.27
8832429	Primary	Somers Heath Primary School	£4,000.10	£4,096.43
8833512	Primary	St Joseph's Catholic Primary School	£3,967.54	£4,061.52
8833522	Primary	St Mary's Catholic Primary School	£4,204.10	£4,380.63
8833603	Primary	St Thomas of Canterbury Catholic Primary School	£3,539.23	£3,750.00
8832004	Primary	Stanford-Le-Hope Primary School	£3,846.70	£3,910.82
8832009	Primary	Stifford Clays Primary School	£3,591.46	£3,750.00
8832001	Primary	Thameside Primary School	£3,921.76	£4,253.92
8832024	Primary	The Gateway Primary Free School	£4,069.85	£4,427.78
8832007	Primary	Tilbury Pioneer Academy	£4,137.46	£4,376.94
8832984	Primary	Tudor Court Primary School	£3,500.00	£3,750.00
8832078	Primary	Warren Primary School	£3,633.90	£3,750.00
8832592	Primary	West Thurrock Academy	£3,797.00	£4,015.48
8832472	Primary	Woodside Academy	£3,629.44	£3,750.00

Funding Formula 2019/20 and 2020/21 - Individual School Level Values

Appendix 2

LAESTAB	Phase	School Name	Per Pupil Value 2019/20	Per Pupil Value 2020/21
8834733	Secondary	Grays Convent High School	£5,045.18	£5,306.59
8834394	Secondary	Harris Academy Chafford Hundred	£4,800.00	£5,000.00
8834003	Secondary	Harris Academy Ockendon	£5,095.89	£5,395.50
8834002	Secondary	Harris Academy Riverside	£4,956.70	£5,299.13
8836906	Secondary	Ormiston Park Academy	£5,491.47	£5,796.78
8835439	Secondary	Ortu Gable Hall School	£4,811.42	£5,166.83
8834001	Secondary	Ortu Hassenbrook Academy	£5,423.32	£5,771.80
8835440	Secondary	St Clere's School	£4,887.18	£5,168.86
8836905	Secondary	The Gateway Academy	£5,455.69	£5,908.09
8834000	Secondary	The Hathaway Academy	£5,273.95	£5,666.08
8835438	Secondary	William Edwards School	£4,800.00	£5,000.00
8839998	Secondary	Orsett Heath Academy	n/a	£5,967.02
8839999	Secondary	Thames Park Secondary School	n/a	£5,967.02

THURROCK SCHOOLS FORUM REPORT

DATE:	12 March 2020
SUBJECT:	Schools' Forum Membership Structure
REPORT OF:	Sarah Williams
THE REPORT IS:	For Decision

1.0 EXECUTIVE SUMMARY

This report proposes that a sub-group is identified to work with the Local Authority (LA) on the structure and renewal of the Schools' Forum membership, which must be in place by September 2020.

2.0 RECOMMENDATIONS

For Forum members to agree to a sub-group to work with the LA on a fair structure that can be presented to the Forum meeting in June 2020. The new members will need to be appointed in time for the Forum meeting in September 2020.

3.0 MAIN BODY OF REPORT

There have been two previous proposals in relation to the Forum membership and structure that have been presented, which were not agreed. In order to ensure all groups are represented fairly, the local authority would like to work with a sub-group of the Forum around numbers of representatives for each of the sectors detailed below.

The LA is aware the make-up of the borough is not comparable to neighbouring authorities due to the number of academies and multi-academy Trusts which, will be considered along with DfE guidance and pupil numbers when identifying a new forum structure that would be appropriate for members to agree upon.

The following sectors will be considered as part of the structure:

1. Stand-alone academies and multi academy trusts
2. Maintained schools
3. Alternative provision (Primary/Secondary)
4. 0-11 Representative
5. 11-19 Representative
6. Governors
7. Diocese

A draft timeline is detailed below:

- April – sub group meeting
- May - draft Forum report to all members for comments
- June – final report presented to Forum meeting
- July – voting takes place and new members appointed
- September – new members attend first meeting

4.0 FINANCIAL / RESOURCE IMPLICATIONS

There should be no financial implications to sector groups, as the fair spread of representation allows each sector to agree funding decisions on an equitable basis.

5.0 CONTACT DETAILS OF LEAD OFFICER / AUTHOR

If you have any queries or comments in advance of the Schools Forum meeting about this report, please contact

NAME: Sarah Williams
ROLE: Service Manager for School Capital, School Catering,
School Admissions and Pupil Place Planning
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 thurrock.gov.uk

A LOOK BEHIND PUPIL PLACE PLANNING

Sarah Williams

March 2020

SCHOOL PLACE PLANNING

Thurrock Council has a legal duty to provide a sufficient number of school places. Planning pupil places is therefore a very important function of the Local Authority.

We have a PPP team in place that meets every 4 weeks. The group is made up of officers from the PPP team, Finance, Admissions, Awards & Benefits, Transport & Early Years. This group reviews current positions, issues and forecasts. This allows the Authority to take the necessary action at the earliest opportunity to increase school places when required.

FORECASTING METHODOLOGY

- Live Birth Data
- Number of children on roll in each year group from Census
- Child yield from developments
- Primary Whole School and Reception
- Secondary Whole School and Year 7
- In Year admissions factor

PRIMARY PLANNING AREAS

AVELEY, OCKENDON & PURFLEET

- Aveley Primary
- Benyon Primary
- Bonnygate Primary
- Dilkes Academy
- Holy Cross Catholic Primary
- Kenningtons Primary Academy
- Purfleet Primary Academy
- Shaw Primary Academy
- Somers Heath Primary

GRAYS

- Belmont Castle Academy
- Denholm Primary
- Harris Primary Academy Mayflower
- Harris Primary Academy Chafford Hundred
- Little Thurrock Primary
- Quarry Hill Primary
- St Thomas of Canterbury R.C. Primary
- Stifford Clays Primary
- Thameside Primary
- Tudor Court Primary
- Warren Primary
- West Thurrock Primary

CORRINGHAM, SLH

- Abbots Hall Primary Academy
- Arthur Bugler Primary
- ORTU Corringham Primary
- Giffards Primary
- Graham James Primary Academy
- St Joseph's Catholic Primary
- Stanford Primary

RURAL

- Bulphan Primary
- Horndon-On-The-Hill Primary
- Orsett Primary

TILBURY

- Chadwell St Mary Primary
- East Tilbury Primary
- Herringham Primary Academy
- Lansdowne Primary Academy
- St Mary's R.C. Primary
- The Gateway Primary Free School
- Tilbury Pioneer Academy
- Woodside Academy

SECONDARY PLANNING AREAS

CENTRAL

- Grays Convent
- Harris Academy Chafford Hundred
- The Gateway Academy
- The Hathaway Academy
- William Edwards School
- Orsett Heath Academy
- Thames Park

EAST

- Gable Hall
- ORTU Hassenbrook Academy
- St Cleres School

WEST

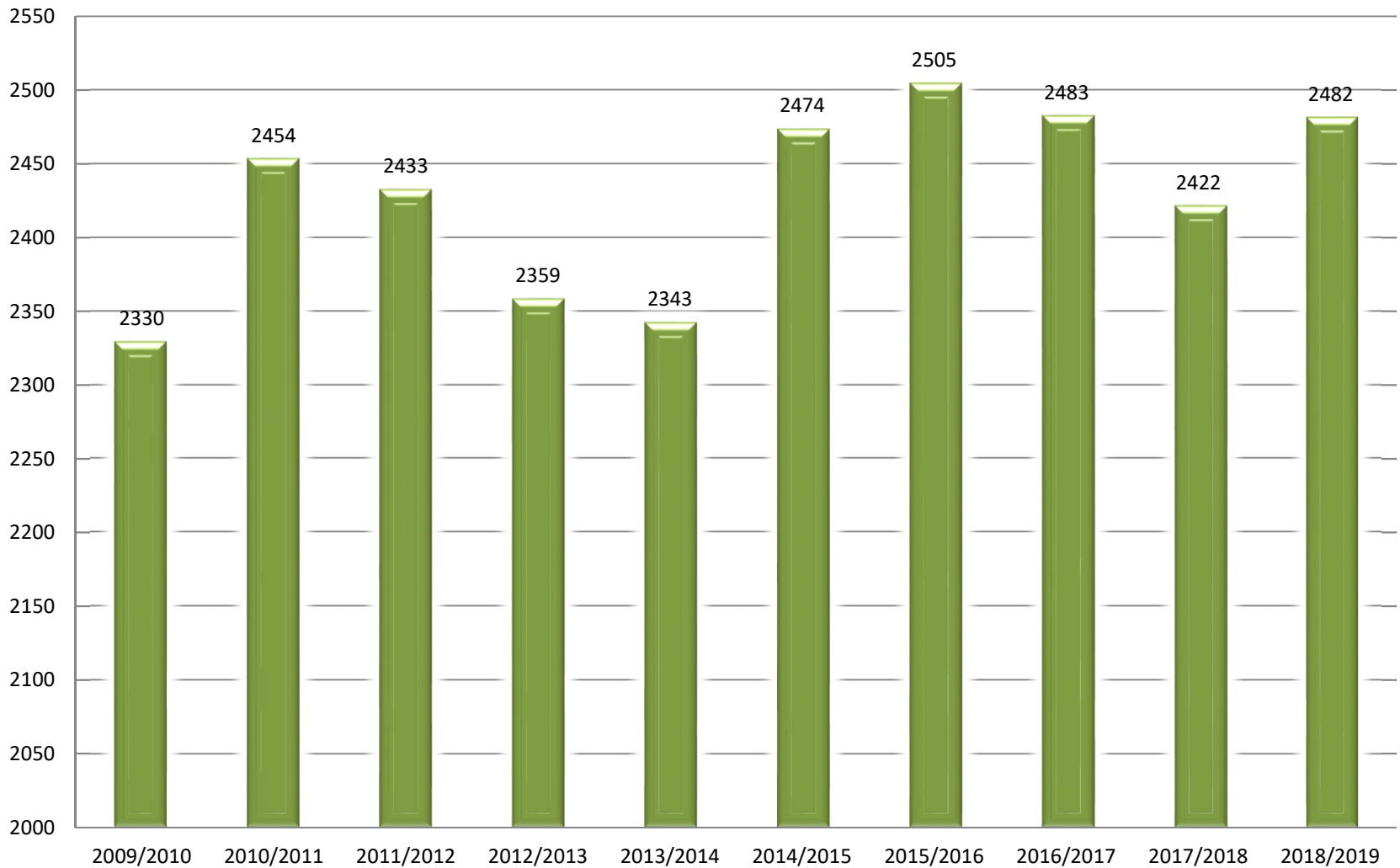
- Ormiston Park Academy
- Harris Academy Ockendon
- Harris Riverside



BIRTH DATA

**FOR THE LAST
TEN YEARS**

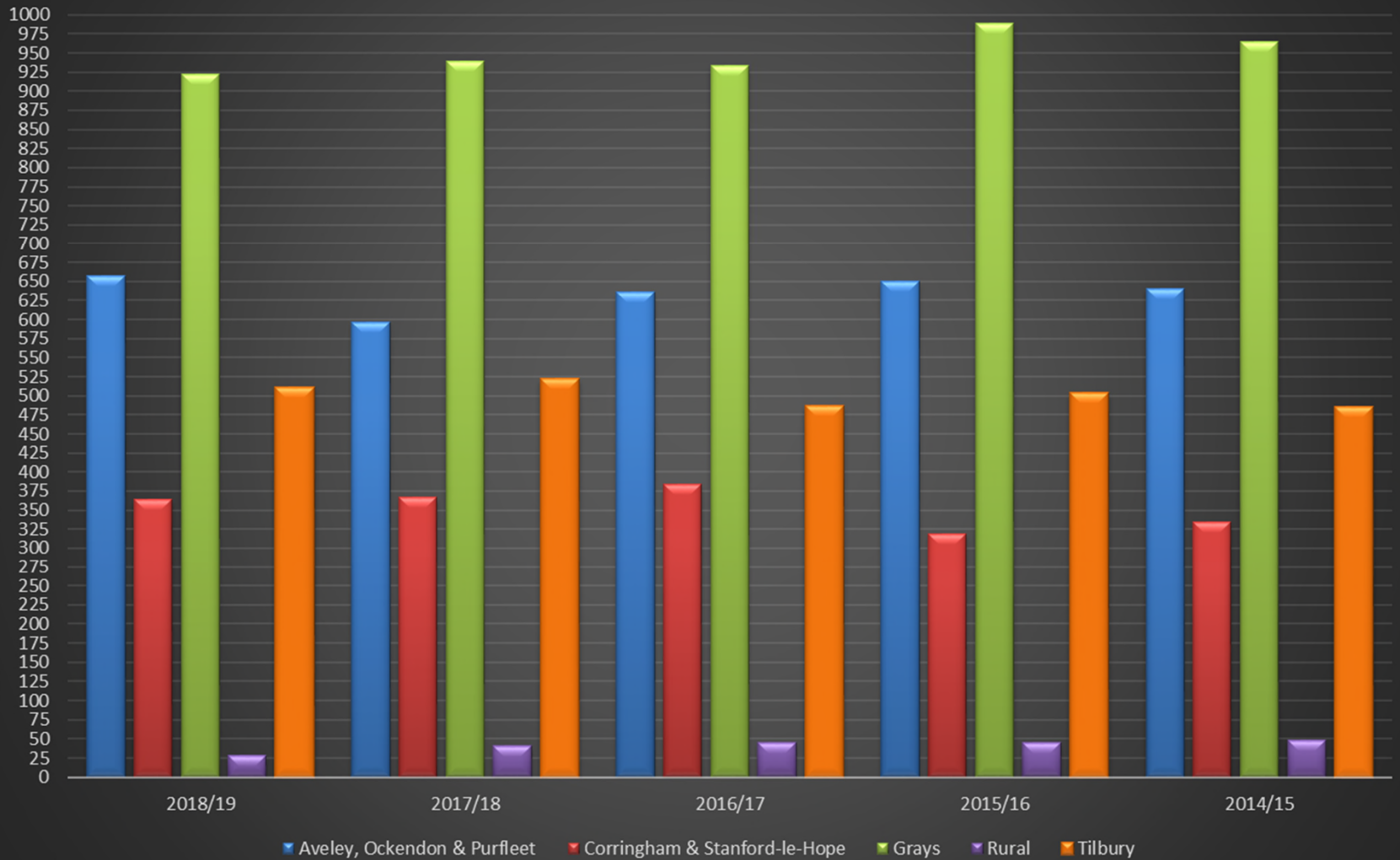
Actual Birth Data over last ten years



Live Births in Thurrock and Reception take up figures 4 years later

Year of Birth	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
Number of live births in the authority	2,152	2,024	2,241	2,261	2,367	2,330	2,454	2,433	2,343	2,343	2,474
Year entering school at 4+	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
Number of children admitted into reception	1,844	1,884	2,237	2,263	2,321	2,277	2,430	2,463	2,407	2,390	2,461
Historical uptake factor	85.69%	93.08%	99.82%	100.09%	98.06%	97.73%	99.02%	101.23%	102.73%	102.01%	99.47%

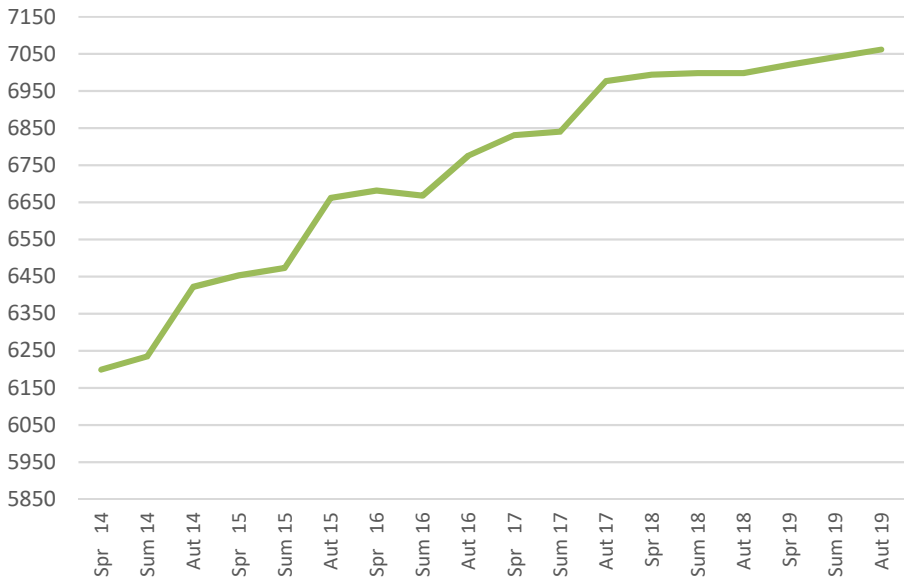
Birth Data by Planning Area for last Five Years



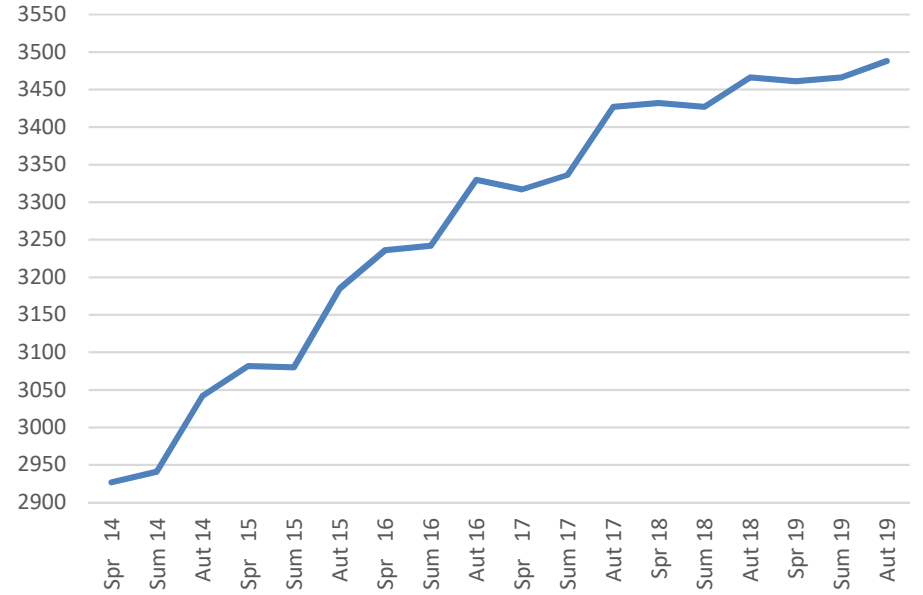


Primary Number on Roll

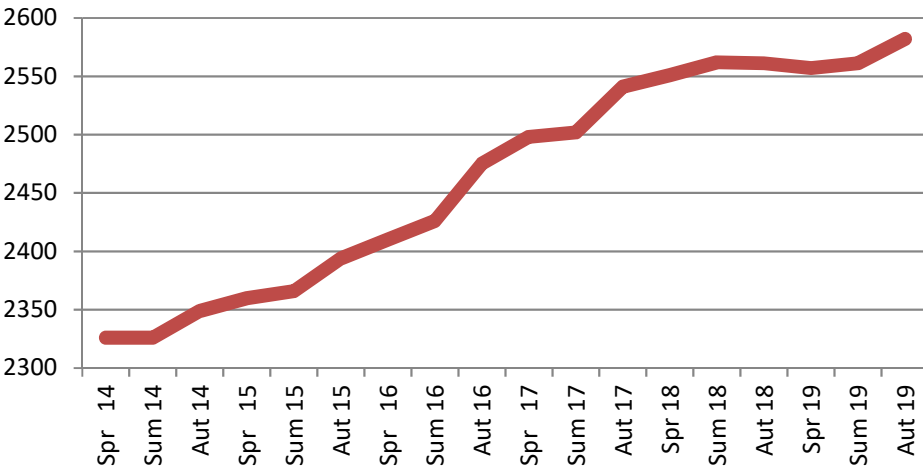
Grays Planning Area NOR



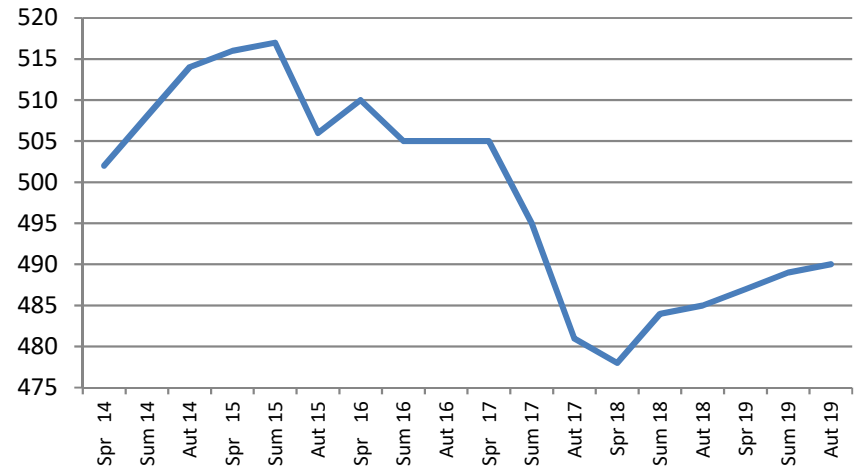
Aveley, Ockendon & Purfleet Planning Area NOR



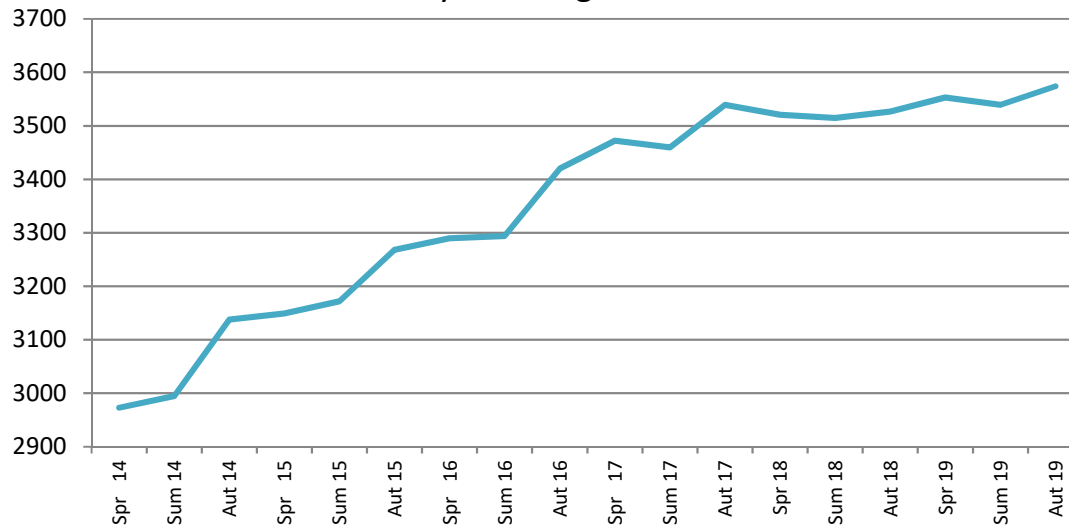
Corringham & SLH Planning Area NOR



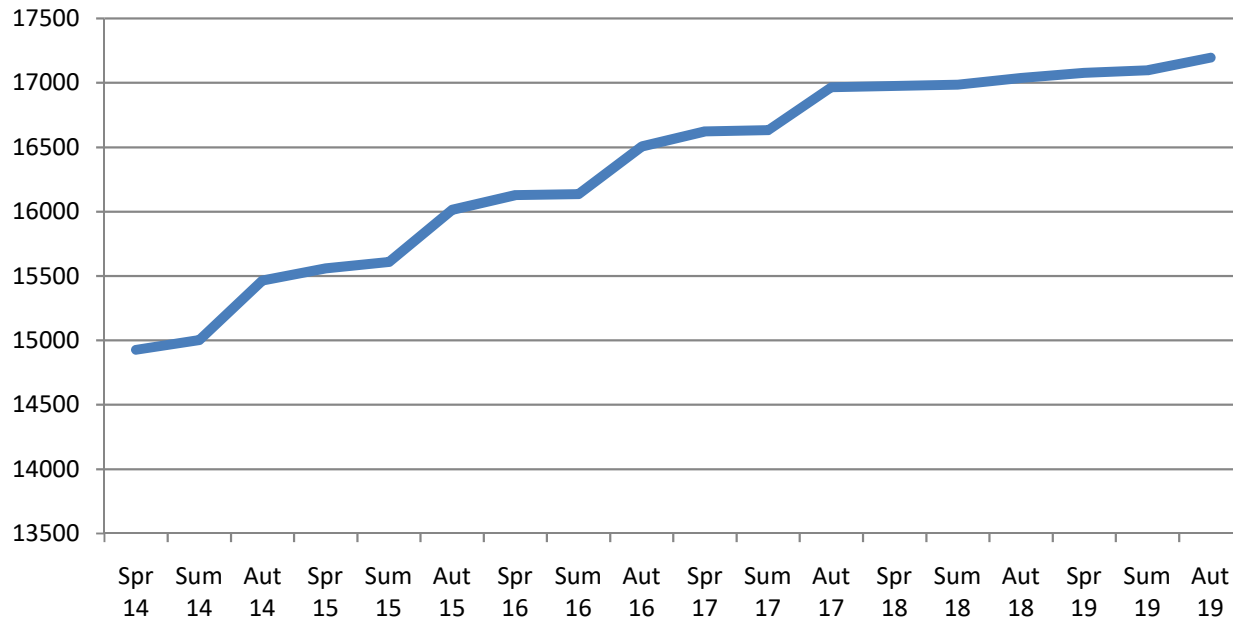
Rural Planning Area NOR



Tilbury Planning Area NOR



PRIMARY - NOR UPTO AUTUMN 19



THURROCK PRIMARY SCHOOLS

Planning Areas	Pupil difference from Census the year before							
	Aut 13 Census Total	Aut 19 Census Total	Aut 14	Aut 15	Aut 16	Aut 17	Aut 18	Aut 19
Aveley, Ockendon & Purfleet	2930	3488	112	143	145	97	39	22
Corringham & Stanford-le-Hope	2318	2582	31	45	81	66	20	21
Grays	6177	7062	245	240	114	201	22	63
Rural	491	490	23	-8	-1	-24	4	5
Tilbury	2972	3574	166	130	152	119	-12	47
Grand Total	14888	17196	577	550	491	459	73	158

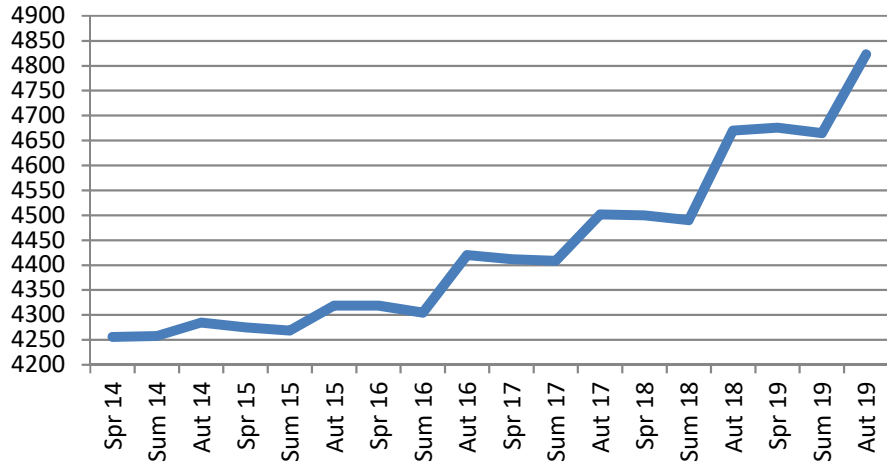
Variance Aut 14 - 19	Increase %	Pupil % by Planning Area in 2019
558	19%	20%
264	11%	15%
885	14%	41%
-1	0%	3%
602	20%	21%
2308	16%	100%

This equates to an increase of 2308 which is a 16% increase on the Autumn 2014 NOR of 14,888 pupils

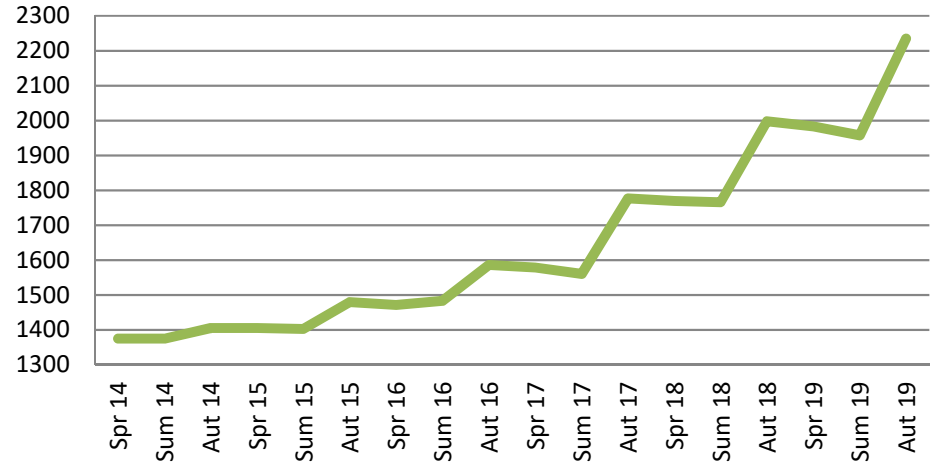


Secondary Number on Roll

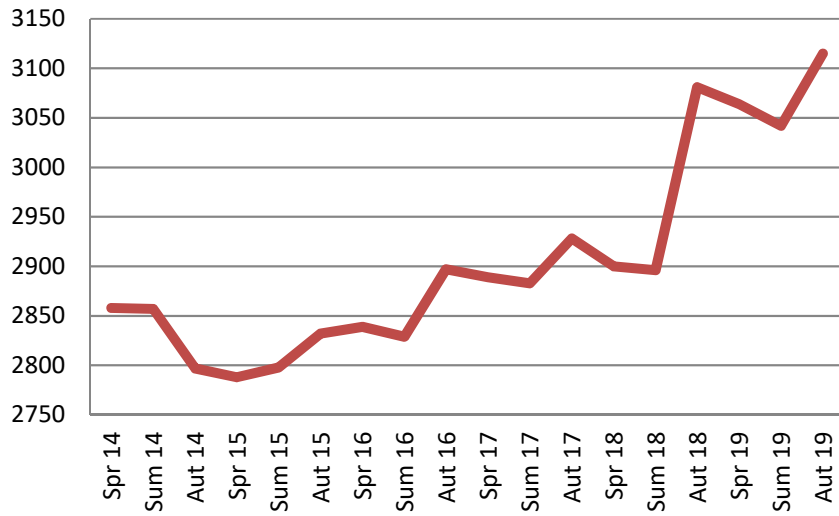
Central NOR



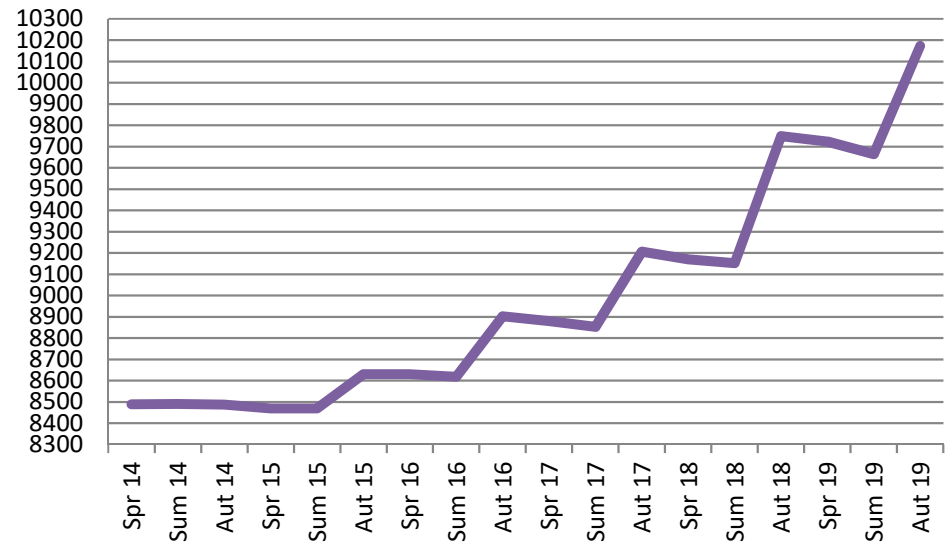
NOR - West Planning Area



East Planning Area



NOR - Total Upto Autumn 19



THURROCK SECONDARY SCHOOLS

	Aut 13 Census Total	Aut 19 Census Total	Pupil difference from Census the year before					
			Aut 14	Aut 15	Aut 16	Aut 17	Aut 18	Aut 19
Central	4257	4823	28	34	101	82	168	153
East	2858	3115	-61	35	65	31	153	34
West	1392	2235	14	74	106	62	350	237
Total	8507	10173	-19	143	272	175	671	424

Variance Aut 14 - 19	Increase %	Pupil % by Planning Area in 2019
566	13%	47%
257	9%	31%
843	61%	22%
1666	20%	100%

This equates to an increase of 1666 which is a 20% increase on the Autumn 2014 NOR of 8507 pupils

Based on PPP 2019-2023 Pupil Place Planning Reception and Secondary 2019 figures

Planning Areas	Original PAN for Reception 2019	Reception 2019 figures from census	PPP 2019-2023 figures	Diff between Rec 2019 & PPP 2019-2023 figures
Aveley, Ockendon & Purfleet	510	486	529	-43
Corringham & Stanford-le-Hope	390	384	376	8
Grays	1,080	1,021	960	61
Rural	72	70	85	-15
Tilbury	510	500	523	-23

Actual Headcount as at 04/03/20
493
379
1,042
70
504

Planning Areas	Original PAN for Secondary 2019	Secondary 2019 figures from census	PPP 2019-2023 figures	Diference between Secondary 2019 and PPP 2019-2023 figures
East	653	646	626	20
West	600	570	557	13
Central	974	1,032	1,026	6
Grand Total	2,227	2,248	2,209	39

Actual Headcount as at 04/03/20
652
578
1,030
2,260

Based on PPP 2019-2023

Yield from Current Developments from Autumn 2019 Census

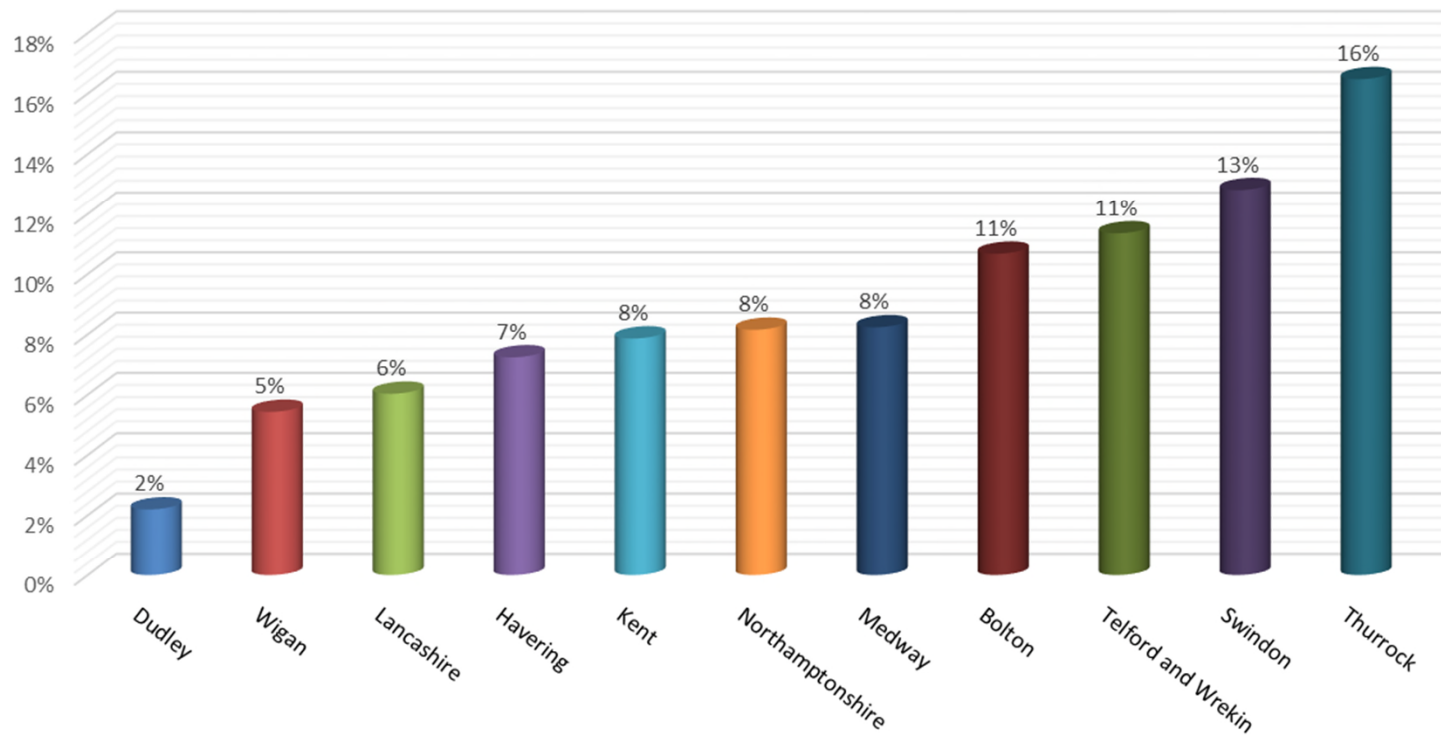
Development	Year Groups															Total
	Nursery	Rec	1	2	3	4	5	6	7	8	9	10	11	12	13	
Tilbury Former St Chads Site	4	12	11	11	10	5	6	12	7	6	6	5	4			99
West Thurrock Green which has just started		1	1			1	1	1								5
Stanford L H Adj St Cleres School	13	21	23	17	17	13	15	17	13	15	10	5	8			187
Ford Factory Phases 1 to 3. Phase 4 and 5 ongoing	7	22	17	20	14	13	15	8	7	8	4	6	2	1	1	145
Grays Gas Holder Site	10	11	17	7	11	7	3	6	6	3	2	4	1			88
East Tilbury(includes Thames Industrial Park, Bata Field Land Adj Bata Avenue And To Rear Of 201 To 251 Princess Margaret Road which are finished. Rear of 4-20 Bata Avenue, East Tilbury RM18 8SD and Land at Junct. Coronation Ave & Princess Margaret Rd still being built		28	23	22	23	13	19	17	8	13	10	11	11	2	1	201
Former College, Woodside	15	18	36	30	23	17	19	23	17	19	5	10	5	1		238
Aveley Development which is Aveley Village and the former football ground	11	27	19	18	24	23	22	16	21	17	13	11	12	1	1	236

Yield Predicted as part of Pupil Place Planning	Primary Total	Secondary Total	Grand Total	Yield completion date
Tilbury Former St Chads Site	48	25	73	by 21/22
West Thurrock Phase 1	52	28	80	by 24/25
West Thurrock Phase 2	36	20	56	by 25/26
Stanford L H Adj St Cleres School	107	43	150	by 21/22
Ford Factory Phases 1 to 3. Phase 4 and 5 ongoing	114	61	175	by 21/22
Grays Gas Holder Site	43	23	66	by 23/24
East Tilbury(includes Thames Industrial Park, Bata Field Land Adj Bata Avenue And To Rear Of 201 To 251 Princess Margaret Road which are finished. Rear of 4-20 Bata Avenue, East Tilbury RM18 8SD and Land at Junct. Coronation Ave & Princess Margaret Rd still being built	118	63	181	by 25/26
Former College, Woodside	111	59	170	by 21/22
Aveley Development which is Aveley Village and the former football ground	139	75	214	by 21/22

List of Developments that have not started and their status

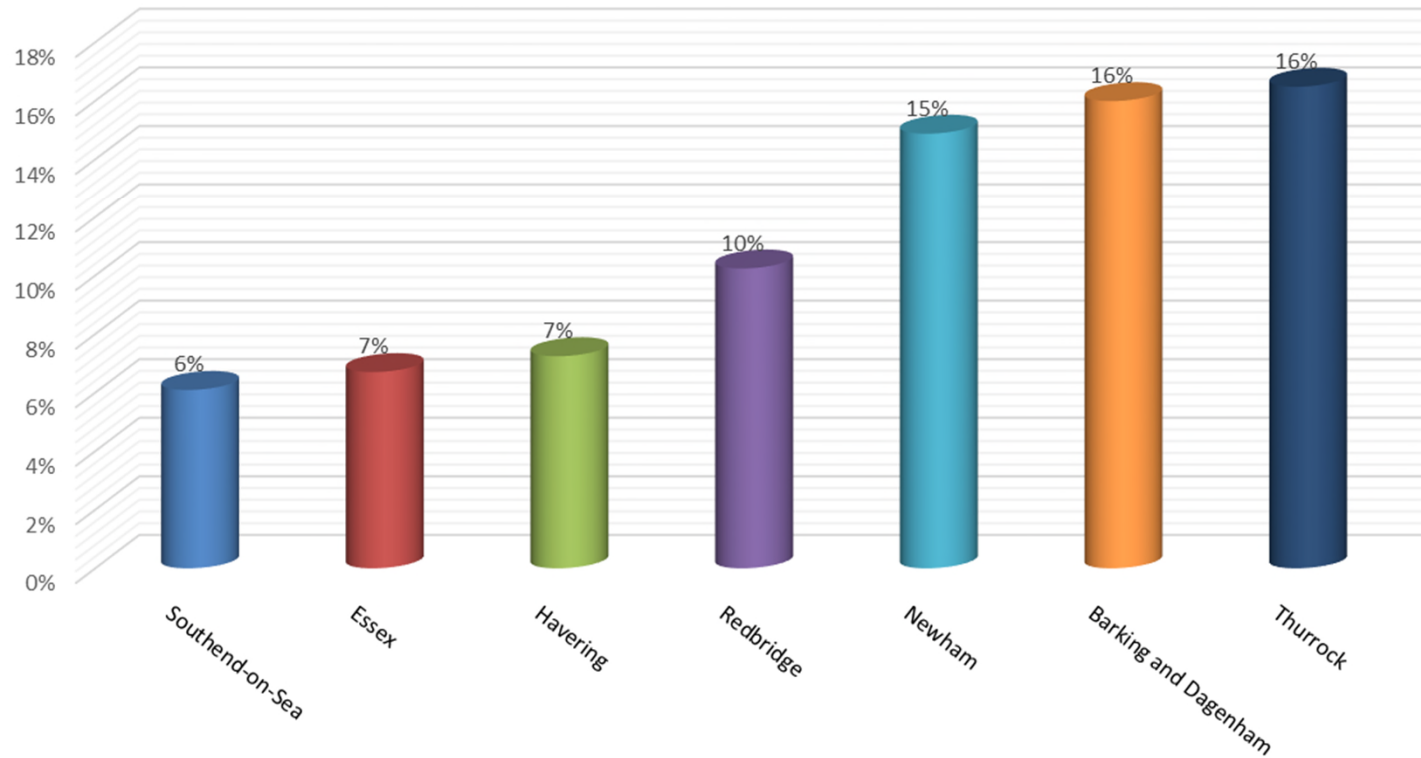
<u>Development Name</u>	<u>Awaiting Planning Permission/Not started yet</u>	<u>No of Units</u>	<u>Catchment/Nearest Primary</u>	<u>Primary Planning Area</u>	<u>Catchment/Nearest Secondary</u>	<u>Secondary Planning Area</u>	<u>Pri Yield</u>	<u>Sec Yield</u>
Land North of Rosebery Rd, Castle Rd & Belmont Rd	not started	80	Belmont Castle	Grays	Hathaway Academy	Central	29.72	15.78
Arena Essex, Arterial Road RM19 1AE PHASES 2-6	not started	2158	Warren Primary	Grays	Harris Academy	Central	163.70	91.10
Arena Essex, Arterial Road RM19 1AE PHASE 1	not started	342	Warren Primary	Grays	Harris Academy	Central	31.60	17.40
Star Industrial Estate, Linford Road - Revised - Phase 3	Not started	203	Herringham	Tilbury	Gateway	Central	50.60	27.20
Purfleet Centre	not started	2850	Purfleet	Aveley, Ockendon & Purfleet	Harris Riverside	West	451.00	246.00
Land off and Adj. to School Manor Road Also 03/11/2015 & 26/07/2016	Awaiting planning decision	93	Thameside	Grays	Hathaway Academy	Central	19.60	10.50
Land Part Of Little Thurrock Marshes, Thurrock Park Way	Awaiting planning decision	161	Thameside	Grays	Hathaway Academy	Central	42.40	22.70
Greenwise Nurseries, Vange Park Road	Awaiting planning decision	31	Corringham	Corringham & S-L-H	Gable Hall/Hassenbrook	East	11.50	6.10
Adj to Railway Line Manorway & West of Victoria Road	Awaiting planning decision	153	Stanford Le Hope	Corringham & S-L-H	St Cleres	East	46.97	24.93
Adj to Railway Line & Southend Road	Awaiting planning decision	750	Corringham	Corringham & S-L-H	Gable Hall	East	279.00	147.00
Land at Muckingford Road, Linford & East Tilbury	Awaiting planning decision	1000	East Tilbury	Tilbury	St Cleres	East	286.00	151.90
Land btw Chadwell Road & Wood View	Awaiting planning decision	75	Little Thurrock	Grays	Gateway	Central	22.800	12.100
Thurrock Airport, Kings Farm, Parkers Farm Road, Brentwood Road, Orsett	Awaiting planning decision	750	Bulphan	Rural	William Edwards	Central		
Land between Dock Approach Rd & Lytton Road	Awaiting planning decision	140	Chadwell St Mary	Tilbury	Gateway	Central		

% Pupil Increase since January 2013 to January 2019



Statistical Neighbours

% Pupil Increase since January 2013 to January 2019



Geographical Neighbours

Summary of Draft PPP 2020-24

School	PAN	Sep-20	Sep-21	Sep-22	Sep-23	Sep-24
PRIMARY NUMBERS	17,724	17,488	17,768	17,868	17,967	18,161
In Year Admissions		263	266	269	269	272
	17,724	17,751	18,034	18,137	18,236	18,433

TOTALS	PAN	Sep-20	Sep-21	Sep-22	Sep-23	Sep-24
SECONDARY NUMBERS	11,160	10,704	11,062	11,518	11,769	11,868
In Year Admissions		160	165	173	177	178
	11,160	10,864	11,227	11,691	11,946	12,046

PAN below include Orsett Heath Academy and Thames Park opening at 120 in September 2020.

TOTALS	PAN
SECONDARY NUMBERS	12,360
In Year Admissions	
	12,360

In Year Applications from Sept 2019 to 260220

	Date	Applications Received					Offers Made					
		Total Applications Received	Moved to England (MTE)	Moved to Thurrock (MTT)	Moved Within Thurrock (MWT)	Total Apps received from MTE, MTT and MWT	Moved to England offers	Moved to Thurrock offers	Moved within Thurrock offers	Total Offered of MTE, MTT and MWT	Total other Offers including Parental Choice	Total Offers made 2019-20
Primary Schools	as at 26/02/2020	1784	100	715	166	981	85	537	118	740	270	1010
Secondary Schools	as at 26/02/2020	1250	77	208	208	493	50	121	6	177	137	314
Totals		3034	177	923	374	1474	135	658	124	917	407	1324

THURROCK SCHOOLS FORUM REPORT

DATE:	12 March 2020
SUBJECT:	Pupil Place Planning
REPORT OF:	Sarah Williams
THE REPORT IS:	For Information

1. EXECUTIVE SUMMARY

The Council's Pupil Place Planning document is reviewed and updated annually. The 2020 to 2024 version will soon be available as a draft for discussion and will be sent to all schools and other stakeholders for comment. The final version will be published once all comments received have been considered and any amendments made.

2. RECOMMENDATIONS

The Schools Forum is asked to note the process for the Pupil Place Plan (PPP) and the impending publication of the 2020-2024 Pupil Place Plan.

3. 2020 – 2024 Pupil Place Plan

The Council has a statutory obligation to ensure there is a sufficient supply of school places for all residents who request a place for their child. As population demographics are dynamic, it is necessary to continually review and update pupil place forecasts. Pupil place requirements are reviewed as part of our PPP team meetings that take place every 4 weeks. The group is made up of officers from the PPP team, Finance, Admissions, Awards & Benefits, Transport, Early Years and School Improvement. This group reviews current positions, issues and forecasts. This allows Thurrock to take the necessary action at the earliest opportunity to increase school places when demand is required. Pupil Growth and Capital Programme updates are provided to Schools' Forum members and at Headteacher briefings.

The PPP gives information about the supply of school places in Thurrock and forecasts pupil numbers for the next five years, with information on the changing context within which planning takes place.

The 2020-2024 PPP is based on the demand for school places from each planning area, rather than representing the anticipated demand for individual schools.

The Plan highlights a number of issues; one of these is the impact of the rise in the birth rate in Thurrock in recent years. 2015/2016 has been the highest

number of live births to date in Thurrock and we are currently processing applications for Reception 2020.

The primary phase forecasts in the 5 year plan are calculated on the basis of known data regarding live births in Thurrock, the number of children already on roll in schools and the anticipated child yield from proposed housing developments in the planning system.

From 2014 to 2019 there has been a 16% (2308 pupil) rise in Primary and a 20% (1666 pupils) rise in Secondary pupils in Thurrock.

With regard to secondary schools, we can still see the increase in demand for school places as the primary cohort move into the secondary phase. Over the next five years we can see the demand for places exceeds the current capacity of existing secondary stock. Orsett Heath Academy and Thames Park Academy are due to open in temporary accommodation, initially with a Published Admission Number (PAN) of 120 spaces each starting in Year 7 Sept 2020. It is planned in Sept 23 both schools will take to their full PAN. The new free schools will alleviate any shortage of places, however we will continue to monitor this in line with any new developments that may impact on the pupil numbers.

Thurrock's forecasting for school places to date has been robust and accurate with a -0.49% difference for Primary Reception and 1.5% for Secondary Year 7 between the forecasted numbers and the actual numbers admitted for September 2019.

FINANCIAL / RESOURCE IMPLICATIONS

School places are funded through allocations of the Dedicated Schools Grant, which is linked to the number of pupils within school, although it is lagged by one year.

The Capital costs of providing the infrastructure to provide more School places are funded through Basic Need Capital Grants. These costs would be identified as part of the Schools Capital Programme.

4. REFERENCES TO OTHER KEY DOCUMENTS / PREVIOUS REPORTS

2019 – 2023 Pupil Place Plan.

Pupil Place Planning Presentation – March 2020

CONTACT DETAILS OF LEAD OFFICER / AUTHOR

If you have any queries or comments in advance of the Schools Forum meeting about this report, please contact

NAME: Sarah Williams
ROLE: Service Manager, Educational Specialist
EMAIL: sjwilliams@thurrock.gov.uk
PHONE: 01375 652971

THURROCK SCHOOLS FORUM REPORT

DATE:	12 March 2020
SUBJECT:	Free Schools and Academies Update
REPORT OF:	Sarah Williams
THE REPORT IS:	For Information

1.0 EXECUTIVE SUMMARY

This report is to provide an update on the delivery of the Free Schools Programme and give an updated on academy conversions.

2.0 RECOMMENDATIONS

This report is for information only. The recommendation is for members to note the contents of the report.

3.0 MAIN BODY OF REPORT

Academies update

There are two maintained primary schools due to convert to academy status on 1 June 2020 and will be joining to Osborne Trust. The two schools are:

1. Bonnygate Primary
2. Warren Primary

Free Schools Update

Thames Park Free School

Work is underway on the temporary accommodation, which will be ready for occupation from September 2020.

There is minimal internal remodelling works required, along with some re-commissioning of pre-installed systems. There are also ground works to be undertaken in order to create a safe and secure outdoor space.

Treetops

There has been an initial timetable of key dates agreed. The contract is in the process of being awarded. The building will be a net zero building construction.

Orsett Heath

The temporary accommodation is well underway and is scheduled to complete ready to open in September 2020.

Reach2

There is no update at present.

4.0 CONTACT DETAILS OF LEAD OFFICER / AUTHOR

If you have any queries or comments in advance of the Schools Forum meeting about this report, please contact

NAME: Sarah Williams
ROLE: Service Manager for School Capital, School Catering,
School Admissions and Pupil Place Planning
E-MAIL: sjwilliams@thurrock.gov.uk
PHONE: 01375 652971

Thurrock School Forum Forward Plan for 2019 – 2020

Date of Meeting	Agenda Item / Focus
25 June 2020 9-11am Conference Centre Harris Academy Chafford Hundred	Academies and Free Schools Update
	DfE Consultations
	DfE Benchmarking Data
	Union Facility Time Annual Review
	Thurrock Code of Practice for delivery of early education for 2, 3 and 4 year-olds
	Schools Forum Membership 2020
	Review of Forward Plan 2020-21

Schools Forum

Draft Minutes of the meeting held on 16 January 2020 – 8:30am to 10am
Orsett Hall, the Jaguar Bar, Prince Charles Avenue, Orsett RM16 3HS

In Attendance:

Primary Academies

Headteacher – Kenningtons
Headteacher – Abbots Primary
Principal – Woodside Academy
Headteacher – Giffards Primary
CEO - Catalyst Academies Trust
Executive Head - East Tilbury Primary & Nursery
Head teacher – Aveley Primary

Ms J Sawtell-Haynes
Mrs L James
Mr E Caines – Vice Chair
Mrs N Haslam-Davis
Mr T Parfett
Mrs L Coates
Ms N Shadbolt

Primary Maintained Schools

Secondary Academies

CEO – ORTU Federation Ltd
CEO – Osbourne Co-operative Academy Trust
Harris Academy Chafford Hundred
CEO – South West Essex Community Education Trust

Dr S Asong
Mr. P Griffiths (The Chair)
Mr. L Glees
Mr. S Munday

Secondary Maintained Schools

Headteacher - Grays Convent

Mrs P Johnson

Special Maintained Schools

Headteacher – Treetops School

Mr J Brewer

Special Academy

Headteacher-Beacon Hill Academy

Ms S Hewitt

Non School Members

Diocese of Brentwood
Diocese of Chelmsford

Mrs M Shepherd
Miss S Jones

The Olive Academy

Mrs P Soltys

Also in Attendance:

Ms Michele Lucas - Assistant Director, Education Skills
Mr Malcolm Taylor - Strategic Lead – Specialist Provision/PEP
Ms A Winstone - School Improvement Manager
Mr David May - Strategic Lead - DSG and Schools
Mrs Lisa Noble - Senior Management Accountant DSG
Ms Sarah Williams - Educational Specialist, Service Manager
Miss Teresa Lydon - Clerk

1. Welcome from the Chair

The Chair welcomed the Forum to the meeting.

2. Apologies for Absence:

Apologies for absence were received from Mr R Harris, Ms C Hunniset, Mrs N Graham.

3. Agreement of Agenda, Time-Guide and Notification of Any Other Business

- a. No items changed.
- b. The Forum agreed the agenda and time guide.

4. Growth Fund

Miss Williams spoke about the need to agree the process for the allocation of growth funding for schools who take bulge classes or expanding schools whereby schools increase their admission number at the request of the Local Authority.

She advised the council continues to work with schools to ensure that there is a sufficiency of school places to meet local demand across the borough. This may involve increasing the published admissions numbers (PAN) in schools where existing places are deemed insufficient to meet projected local demand.

The growth fund may not be used to support schools in financial difficulty. Growth funding in Thurrock will be applied in the following circumstances;

- where a school or academy has agreed with the local authority to provide additional places (30 places) to meet basic need in the area (either as a bulge class or on-going commitment).
- support where a school has increased its PAN in agreement with the local authority to meet basic need in the area.

Funding will be for a full class of 30 children, funded for one year only. For example from September to the following August. There will then be an annual review of the numbers in the bulge class using the summer census. Funding in the second year will be based on the difference in actual numbers of children on roll between the summer and October census. It will not apply in the following circumstances:

- For any PAN increases which are not agreed with the local authority as part of the place planning process to meet basic need in the area.
- Where pupils are admitted above a schools PAN as a consequence of appeal, infant class size regulation exceptions or error in the school admissions process.
- The fund will not be applied retrospectively and will only apply to increases in class size agreed with the council.

Funding will not be provided following the October census whereby the class is not full to capacity.

Mr May confirmed should a surplus on the growth fund arise this is ring-fenced and would require Schools Forum to decide where this money is spent.

Miss Williams advised that they are currently in discussions to increase in the Aveley, Ockendon, Tilbury and Stanford areas in certain year groups.

The Chair commented this needs to be cost effective. The Chair asked if the money will be the same as the money they would get per pupil from the census. Mr May advised that they would guarantee this amount until the child is on the census. If the class does not fill then they will continue to pay this amount in the following year. Ms Sawtell-Haynes advised that their Year 1 class which was a bulge has never been full. This has a detrimental effect on the school budget. The Chair advised this is a risk as they may never fill the class. The Chair commented that when asking the school to take a bulge class they need to explain the risks. Mr Parfett commented that some of the buildings used for these bulge classes are not always of the highest quality. Mrs Haslam-Davis advised that the timing of putting in the classes is not always in time to stop the amount of appeals.

AGREED

The Forum members present agreed the proposed criteria for schools and academies accessing funding allocated for growth. This includes the change from the Basic per pupil entitlement to the Minimum per Pupil Values.

The Forum members present agreed the Growth Fund budget for 2020/21 of £1,385,429.

5. Dedicated Schools Grant (DSG) 2020/21

Mr May gave an overview of the paper and discussed the Dedicated Schools Grant (DSG) allocations for 2020/21, updated to reflect the October 2019 census data. The funding to be received has increased from £7,071m to £10.109m.

He advised that the High Needs Block continues to experience significant increase in demands and costs. It is proposed to transfer funding from the Schools Block £0.635m and the Central Services School Block £0.023m.

In September 2019 the government announced schools and high needs funding for the 3 year period 2020/21 to 2022/23. He advised that additional investment will allow for cash increases of £2.6 billion next year, £2.2 billion in 2021/22 and £2.3 billion in 2022/23. As well as this £1.5 billion will be provided each year to fund additional pension's costs for teachers, bringing the total schools budget £52.2 billion in 2022/23.

The High Needs National Funding Formula (NFF) for 2020/21 with over £700 million of additional funding will ensure that every local authority will receive an increase of at least 8% per head of 2 to 18 population through the funding floor.

The teachers' pay grant and teachers' pension employer contributions grant will continue to be paid separately from the NFF in 2020/21. The Chair advised that the teachers' pension has now got a date against it until April 2023. Mr May advised there is no decision beyond this date.

SCHOOLS BLOCK

The long term intention is that schools' budgets should be set on the basis of a single, national formula (a 'hard' formula) completed centrally by ESFA.

Locally, budget flexibility arrangements allows for the Schools Forums to agree transferring up to 0.5% of their School Block funding to High Needs Block.

Key Aspects of the NFF for 2020/21 are:

Minimum pupil funding levels will be set at £3,750 for primary schools and £5,000 for secondary schools. In 2021/22, the primary minimum level will increase to £4,000.

Funding floor will be set at 1.84%

There will be no gains cap in the NFF therefore all schools attract their full core allocations.

A technical change will be made to the mobility factor so that it allocates this funding using a formulaic approach.

Growth funding will be based on the same methodology as this year.

Mr May went through the Schools Funding formula 2020/21 showing a breakdown of the funding. He advised that after applying the principals agreed in November a sum of £0.900m remained unallocated. The Basic entitlement values have increased by 1.01680, this increases the amount distributed through the Basic Entitlement from £93.466m to £95.036m for basic entitlement. The minimum funding per pupil and MFG have both reduced as a result of more funding being distributed through the basic entitlement.

Mr May advised that confirmed growth has been included in the formula. This includes the two new free schools for September.

Mr May advised that they have transferred £0.635m a 0.498% increase to the High Needs Block fund. This is the maximum amount they can transfer.

Free School Meals factor has been re-introduced in Thurrock for 2020/21. Mr May handed out a report to all forum members with the amounts of money each school will receive. He advised that some schools have a significant decrease in children but have had less reduction in money due to the additional money received.

The Chair asked why the “per pupil value” varies. Mr May advised that the per pupil values reflect the individual characteristics of each school.

Mr Caines asked if all schools know their IDACI (Income Deprivation Affecting Children Index) number. Mr May advises the funding statement breaks down given to each school includes the IDACI number. Dr Asong would like the IDACI ranking sent out to all forum members.

Action: IDACI rankings to be sent to all schools

The Chair commented that it is with regret that we have to move money from the Schools Block to the High Needs Block. He feels this is not the ideal situation. He commented that the Schools Block will not be allowed to subsidise the High Needs Block in the future. Mr May commented that in the future if this is moved centrally there will be no movement of monies between the different blocks. He also commented that the Local Authority is not allowed to put money into the DSG from this year.

Mr Caines asked if they will continue to pay for Home to School transport in the future. Mr May commented that the current DSG contribution is the same value as that included in the DSG in 2005/06. Thurrock Council is seeking to stop this contribution over a phased 5 year period to support HNB and DSG deficit.

The Chair commented that we appreciate what the Local Authority are trying to do to reduce the transport costs and in future this will not be taken from the DSG. Mr Caines commented that we need to try and manage the parental expectation for SEN children. The Chair commented that the Forum does represent every child in the borough.

AGREED

- **The Forum members present voted and agreed HNB contribution of £0.635m (0.498%)**
- **The Forum members present voted and agreed with one abstention the Growth Commitments included in LFF**
- **The Forum members present voted and agreed Retained Growth budget of £1,385m**

The Cabinet will ratify the 2020/21 formula at its meeting on 12th February 2020.

CENTRAL SCHOOLS BLOCK

Mr May discussed the confirmed funding allocation for 2020/21. The majority of budget allocations for 2020/21 are a fixed contribution to statutory regulatory duties. An unallocated budget of £0.023m has been identified and it is proposed that this is transferred to the High Needs Block.

AGREED

The Forum members present voted and agreed with one abstention the following:

- **Statutory and Regulatory duties budget of:**
 - *Education Services £0.352m*
 - *Finance Services £0.140m*
 - *School Place Planning £0.053m*
- **School Admissions £0.236m**
- **Services of Schools Forum £0.014m**
- **SACRE £0.010m**
- **Contribution to HNB £0.023m**
- **Contribution to Combined Budgets £1.022m**

HIGH NEEDS BLOCK

Mr May discussed the High Needs Block funding and how the budget is made up. It has had an increase of £2.211m or 9.51%.

Mr May advised that a very challenging and stretching balanced budget is proposed but the following key risks need to be acknowledged and closely monitored throughout the year.

Key Risks:

- Top Up Funding - Thurrock Schools & Academies - Budget to equal the 2019/20 forecasted outturn. Potential financial Risk £351,980;
- Top Up Funding - Other Local Authorities (4-16) - Budget to equal the 2019/20 forecasted outturn. Potential financial Risk £57,338;
- Top Up Funding - Post 16 - Budget to equal the 2019/20 forecasted outturn. Potential financial Risk £173,114;
- Pupils not in School - A 27% decrease in cost compared to 2019/20 forecasted outturn. Potential financial Risk £60,000;
- Residential - Non Maintained and Independent - A 16% decrease in cost compared to 2019/20 forecasted outturn to reflect increase in local offer. Potential financial Risk £300,000;
- Non Residential - Non Maintained and Independent - A 20% decrease in cost compared to 2019/20 forecasted outturn to reflect increase in local offer. Potential financial Risk £300,000;
- Additional High Needs Targeted - A 36% decrease in cost compared to 2019/20 forecasted outturn. Potential financial Risk £100,000;
- High Needs Central Team - An increase on projected outturn but less than 2019/20 budget. Potential financial Risk £79,000.
- Total Potential Financial Risk £1,421,432.

The Chair commented that this budget will be in deficit next year by 1.4m.

Mr May advised that the budget included commissioned numbers, an increase of 51 extra places for 2020/21 that were agreed at the October meeting.

Discussions are planned with Headteachers and ESFA on the High Needs Block and options available. The level of funding to be received is not sufficient to manage current demand.

Mr Taylor commented that at their Case Management meetings they are trying to make sure that plans are only completed for children who need them. In the last few months they have had extreme high costs in placing children out of borough. There has been a significant increase in these placements which are needed as there is no provision locally which will meet the needs of these children.

Mr May advised that trying to increase the local offer is the right thing to do. They also need to look at trying to move out of borough placements back in borough. Mr Taylor commented that they are making every effort possible to try and bring placements back in borough. This work is ongoing. Dr Asong commented that we need to make sure that the parental expectation is lowered and that the support they expect is not always able to be given due to the financial burdens on schools. Dr Asong feels that the plans need to be worded differently as this is a legal document. Ms Winstone commented it is very hard as parents will not sign these plans until they get what they want. Mrs James commented that the plans should be changed to not include the amount of hours.

The Chair commented that the High Needs Block is a crucial feature of the debate. It is self-evident about the cultural change around the borough and they need to look at what other boroughs do and think about changing the plan content. Mr Taylor commented the Local Authority have a duty to make sure they have an inclusive offer.

The Chair thanked the Local Authority for their openness and transparency.

AGREED

- **The Forum members present voted and agreed the High Needs Budget for 2020/21 and the associated risks.**

EARLY YEARS BLOCK

Mr May advised within the funding announcement is an additional £66 million investment in early years. A recent announcement confirms that the hourly rate paid to Thurrock will increase by 8p. This is the first increase in the hourly rate that Thurrock has received since 2016/17.

In addition the use of the carry forward has been considered and the final option for consideration is to:

- passport in full the 8p increase in hourly rates to providers;

- increase the hourly rate paid to 3 and 4 year old providers by an additional 2p per hour, with a cost implication of £45,000;
- increase the deprivation quantum and change the formula to be based on the postcode of the child, not the setting. Deprivation funding would increase from £220,000 to £285,000, a cost Implication of £65,000.
- The total cost implication of £110,000 to be funded from the available carried forward allocation of £167,000.

Mr May advised that the proposals have been discussed with both the Early Years managers and the childminders forum with the following outcomes:

- A shared understanding that Thurrock can only increase rates on receipt of funding from the ESFA.
- There is a significant risk due to the use of the January headcount for Early Years funding but providers paid on a termly basis with change in take up throughout the year.
- It was acknowledged that the funding rates paid present a significant challenge to providers.

AGREED

- **The Forum members present agreed to support the change to early year's formula but the final decision will not be voted on until the March meeting, pending the outcome of the January 20 census return thus minimising the risk and ensuring the proposal can be funded on an ongoing basis.**

DSG DEFICIT RECOVERY PLAN

Mr May commented that the historic deficit position is forecasted to be £2.150m and may increase to £3.5m by the end of 2020/21. The Chair commented that trying to balance this will significantly affect the children.

Mr May advised that a meeting is to be held with the ESFA on 11th March 2020, with representatives from the Funding and Special Educational Needs teams to support Thurrock in developing the recovery plan further. He advised that increased demand for specialist placements, Education Health and Care Plans and increase in costs in 2019/20 and 2020/21 makes the existing plan to return to a balance position by March 2022 as unachievable. For 2020/21 the focus has been on setting a balanced budget.

6. Date of next meeting

Meeting Date	Time	Venue
12 March 2020	09:00	To be advised