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COMMITTEE NAME: Lincolnshire Schools' Forum
MEETING DATE: Wednesday, 9 October 2013
MEETING TIME: 2.00 pm
LOCATION: Council Chamber, County Offices, Newland, Lincoln LN1 1YL

AGENDA

Item	Title	Pages
1	Apologies for Absence/Replacement Members	
2	Minutes of the meeting held on 26 June 2013	1 - 6
3	School Funding Reform: Findings from the Review of 2013/14 & Arrangements and Changes for 2014/15 <i>(To receive a report from Tony Warnock, Head of Finance for Children's and Specialist Services, which consults the Schools Forum on the Local Authority's (LA) proposals for the funding of schools from April 2014)</i>	7 - 22
4	Revised School Budget 2013/14 <i>(To receive a report from Tony Warnock, Head of Finance Children's and Specialist Services, which notifies the Schools Forum of the revised Schools Budget for 2013/14 and to seek support for the proposed use of the underspending from 2012/13)</i>	23 - 28
5	Scheme for Financing Schools <i>(To receive a report from Tony Warnock, Head of Finance Children's and Specialists Services, which highlights to the Schools Forum the latest publication by the DfE of its revised guidance on Schemes for Financing Schools)</i>	29 - 32

- 6** **2013/14 Section 251 Benchmarking Information** 33 - 38
- (To receive a report from Tony Warnock, Head of Finance Children's and Specialists Services, which provides the Schools Forum with the latest s.251 benchmarking data published by the DfE in September 2013)*
- 7** **Maintained School Carry Forwards (2012/13)** 39 - 48
- (To receive a report from Tony Warnock, Head of Finance Children's and Specialist Services, which provides the Forum with information regarding Lincolnshire maintained schools' carry forwards at 31 March 2013)*
- 8** **Academies Update** 49 - 52
- (To receive a report from Michelle Andrews, Head of Property and Technology Management, which provides the Schools Forum with information on the latest number of pupils in academies)*
- 9** **School and Early Years Finance Regulations 2013 and additional grant conditions for the Dedicated Schools Grant - DfE consultation** 53 - 56
- (To receive a report from Tony Warnock, Head of Finance Children's and Specialist Services, which advises the Schools Forum that on 2nd August 2013, the DfE published a consultation on the School and Early Years Finance Regulations for 2013 and additional grant conditions for the Dedicated Schools Grant)*
- 10** **Schools Financial Value Standard** 57 - 60
- (To receive a report from Tony Warnock, Head of Finance Children's and Specialist Services, which provides the Schools Forum with an update on the Schools Financial Value Standard)*
- 11** **Information Pack** 61 - 88

Tony McArdle
Chief Executive
Date: 1 October 2013



LINCOLNSHIRE SCHOOLS' FORUM 26 JUNE 2013

PRESENT: TERL BRYANT (CHAIRMAN)

David Bennett (Governor, Horncastle Queen Elizabeth's Grammar School), Ellenor Beighton (Headteacher, De Aston, Market Rasen), Professor Ken Durrands CBE (Governor, The Kings, Grantham), Roger Hale (Headteacher, Caistor Grammar School), Jonathan Maddox (Headteacher, Bourne Grammar School), Richard Thomson (Headteacher, Rauceby Primary School), Jennifer Wheeldon (Headteacher, Ellison Boulters Primary, Scothern), Joanne Noble (Headteacher, Gainsborough Nursery School), John Beswick (Governor, Stickney Church of England Primary School), Roger Hewins (Governor, Corringham Church of England Primary School), Vicky Cook (Headteacher, Welbourn Church of England School), Patricia Ruff (Headteacher, Dunholme St Chad's Primary School), Ian Wilkinson (Headteacher, Deeping St James Primary School), Bridget Robson (Headteacher, Lincoln The Fortuna Primary School) and Claire Flavell (14-19 Partnership)

Councillor D Brailsford attended the meeting as an observer

Officers in attendance:-

John O'Connor (Head of Service - School Administration), Debbie Barnes (Executive Director Children's Services), Andrea Brown (Democratic Services Officer), Gary Nixon (Head of Additional Needs), Douglas Robinson (Environmental Services Team Leader (Sustainability) and Tony Warnock (Head of Finance – Children's & Specialist Services)

1 ELECTION OF CHAIRMAN

RESOLVED

That Terl Bryant be elected Chairman of the Forum for the ensuing municipal year.

2 ELECTION OF VICE-CHAIRMAN

RESOLVED

That Michael Follows MBE and John Beswick be elected Vice-Chairmen of the Forum for the ensuing municipal year.

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3 APOLOGIES FOR ABSENCE

Apologies for absence were received from John Beaven (Headteacher, Scampton Pollyplatt Community Primary School), Graham Burks (Headteacher, Kesteven & Grantham Girls' School), Michael Follows MBE (Governor, Boston John Fielding Community Special School), Simon Hardy (Faith Groups), Jeremy Newnham (Headteacher, Caistor Yarborough), Chris Rolph (Headteacher, Monks' Dyke Tennyson College) and Dave Thompson (Teaching and Learning Centre).

An apology for absence was also received from Councillor Mrs P A Bradwell (Executive Councillor for Adult Care & Health Services and Children's Services).

4 MINUTES OF THE MEETING HELD ON 24 APRIL 2013

Confirmation was received that the reference to the delegated money to local authorities for Post-16 children with learning difficulties and disabilities, at minute number 3, would have a separate line entry in the budget.

RESOLVED

That the minutes of the previous meeting held on 24th April 2013 be agreed and signed by the Chairman as a correct record.

In order to allow the Executive Director for Children's Services to attend another, prior engagement, the Chairman agreed to rearrange the agenda as follows:-

- Item 8 – Higher Level Needs (SEND) Funding and General Matters
- Item 9 – Pathfinder Outreach Social Communication including Autism Outreach
- Item 7 – Ethnic Minority and Traveller Education Team (EMTET) Funding
- Item 5 – Lincolnshire Schools' Forum Membership
- Item 6 – Energy Update
- Item 10 – School Funding Reform: Findings from the Review of 2013/14 & Arrangements and Changes for 2014/15
- Item 11 – Academies Update
- Item 12 – Work Programme

5 HIGHER LEVEL NEEDS (SEN) FUNDING AND GENERAL MATTERS

Gary Nixon, Head of Additional Needs, introduced the report which provided information regarding SEN funding in Lincolnshire schools, funding for learners with high level needs, SEN funding allocation for schools outside Lincolnshire and general SEN funding matters and statistics.

During discussion, the following points were noted:-

- Although the statutory assessment need to take place within 26 weeks, the Local Authority has to provide time for all those professionals involved to liaise with parents and schools, where required. If all information is provided

before the 26 week deadline is reached then the Local Authority has the ability to issue a statement earlier. However, if all required information has not been received, but a statutory assessment is signed off, then the Local Authority could be open to challenge.

- Concern was noted that 26 weeks of a 39 week school year is a long time. It was thought that this may or may not change within the new guidance.
- Confirmation was provided that it was illegal to directly attach money to a statement, although it was acknowledged that it did cost differing amounts for each child. The statement itself, however, was to identify what the Special Educational Needs of the child were and not to give consideration to the costs involved.
- It was explained that no significant changes to the funding regime had been implemented since April 2010 when the new SEN factor was introduced. However, under the Government's school funding reforms for 2013/14, it was necessary to identify the notional SEN.

AGREED

1. That the report be noted.

6 EXCLUSION OF THE PUBLIC AND PRESS

RESOLVED

That under Section 100(A) of the Local Government Act 1972, the press and public be excluded from the meeting for the following items on the grounds that they involve the likely disclosure of exempt information as defined by Paragraphs 1 and 3 of Schedule 12A of the Act, as amended.

7 PATHFINDER OUTREACH SOCIAL COMMUNICATION INCLUDING
AUTISM OUTREACH

Gary Nixon, Head of Additional Needs, introduced the report and explained the salient points therein.

RESOLVED

That the recommendation to accept Option 2, as set out within the report, be agreed.

That a report on the funding of outreach services from April 2014 be presented to the next meeting.

8 ETHNIC MINORITY AND TRAVELLER EDUCATION TEAM (EMTET)
FUNDING

John O'Connor, Head of Service – School Administration, introduced the report, which sought the approval of members of maintained schools only.

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RESOLVED

That the recommendation to accept Option 3, as set out in the report, be approved.

Members of the public and press were readmitted to the meeting at this point.

9 ENERGY UPDATE

Doug Robinson, Sustainability Team Leader, introduced the report which provided an update on the recent activity and implementation of the Schools Collaboration on Resource Efficiency (SCoRE) programme.

During discussion, the following points were noted:-

- Further work was required to ensure that current maintenance programmes are linked with this programme.
- As this was a relatively new programme, it was acknowledged that issues were being encountered as the programme progressed but that these were being addressed. For example, it appeared that the SALIX scheme was available to academies at the present time.
- The possibility of making loans available to academies for this programme was being explored and contact had been made with the EFA.

RESOLVED

That the report be noted.

10 LINCOLNSHIRE SCHOOLS' FORUM MEMBERSHIP

Andrea Brown, Democratic Services Officer, introduced the report and explained that an election process would be undertaken prior to the next meeting to ensure that all vacancies were filled. Work would be required to ensure that a balance was reached in each of the groups whilst undertaking the election.

During discussion the following point was noted:-

- Although substitute forms had previously been sent to members of the Forum, very few had been returned. To ensure full representation, it was agreed that these be sent again.

RESOLVED

1. That the report be noted;
2. That Substitute Forms be circulated with a deadline for return;
3. That paperwork be corrected to show that Councillor Mrs Bradwell is not a Member of the Forum. That would not be permissible under DfE regulations.

11 SCHOOL FUNDING REFORM: FINDINGS FROM THE REVIEW OF
2013/14 & ARRANGEMENTS AND CHANGES FOR 2014/15

Tony Warnock presented the report which provided the Schools Forum with recent Government announcements, outlined the principles the Local Authority was to adopt when responding to the reforms and the proposed next steps for this particular piece of work. The views of the Forum were also sought on the provisional ideas for dealing with the DfE's latest proposals.

During discussion the following points were noted:-

- If the sparsity factor was applied, it was confirmed that 73 primary schools and only eight secondary schools would qualify, The DfE's consideration of the proximity grammar schools in its sparsity calculations was unclear. The DfE had been contacted to request detailed information on how this guidance had been developed.
- Members took a view on the key changes announced by the Minister in light of the LA's provisional views, as set out in Appendix 2:-
 - Introduction of a sparsity factor - agreed
 - Greater flexibility to target the right level of lump sums available – agreed
 - Provision of funding to support good and outstanding maintained schools and academies through short periods of falling rolls – agreed
 - The amendment of the prior attainment factor – agreed
 - The application of a 10% threshold by LA's should schools choose to operate a mobility factor – agreed
 - The option in relation to Looked After Children – members suggested that this issue should be explored further prior to making a decision
 - Notional SEN and plans to set that at £6,000 per pupil – agreed

RESOLVED

1. That the report be noted;
2. That the comments noted above be considered before the LA drafts formal proposals for consultation with schools on any changes to school funding which may need to be made in 2014/15; and
3. That a request for nominations for the working group arranged for 24 September 2013 be sent to members of the Schools Forum after the meeting.

Councillor D Brailsford and Ms J Wheeldon left the meeting at this point and did not return.

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12 ACADEMIES UPDATE

Tony Warnock introduced the report which provided the forum with the position of recent academy conversions as at 1st June 2013, based on the latest available pupil figures.

RESOLVED

That the report be noted.

13 WORK PROGRAMME

No changes were made to the work programme presented. One addition was made for consideration at the meeting scheduled for October 2013:-

1.Pathfinder Outreach Update Report (Gary Nixon)

RESOLVED

That the work programme and all changes therein be noted.

14 DATES OF FUTURE MEETINGS

The dates of future meetings of the Schools Forum were confirmed as follows:-

- Wednesday 9th October 2013 at 2.00pm
- Wednesday 15th January 2014 at 2.00pm
- Wednesday 23rd April 2014 at 2.00pm
- Wednesday 25th June 2014 at 2.00pm (AGM)

RESOLVED

That future dates be noted.

15 INFORMATION PACK

RESOLVED

That the items on the Information Pack be noted.

The meeting closed at 4.30 pm

REGULATORY AND OTHER COMMITTEE REPORT

NAME OF COMMITTEE:	Schools Forum
DATE OF MEETING:	9 October 2013
SUBJECT:	School Funding Reform: Findings from the Review of 2013/14 & Arrangements and changes for 2014/15
REPORT BY:	Tony Warnock (Head of Finance – Children's and Specialist Services)
NAME OF CONTACT OFFICER:	Tony Warnock
CONTACT OFFICER TEL NO:	01522 553250
CONTACT OFFICER EMAIL ADDRESS:	tony.warnock@lincolnshire.gov.uk
IS REPORT CONFIDENTIAL?	No

SUMMARY

The purpose of this report is to consult the Schools Forum on the Local Authority's (LA) proposals for the funding of schools from April 2014. In June 2013, the Government announced a number of changes to school funding arrangements for 2014/15. The LA outlined details of that announcement in a report to the Schools Forum on 26th June 2013 and since then consultations have taken place with various groups. Having considered the responses, the LA is now in a position to present its latest proposals for the funding of schools from next year, for the Schools Forum's consideration.

DISCUSSION

Background

The DfE introduced radical reforms to school funding arrangements on 1st April 2013. On 5th June 2013, following a review of those arrangements, the government published 'School Funding Reform:

Findings from the Review of 2013/14 & Arrangements and changes for 2014/15'. The latest proposals are largely a refinement of the changes made in 2013/14 and the impact upon most schools is likely to be much more modest.

Once again, the LA has to follow a similar process to last year, including consulting with various bodies, e.g. all schools. The LA has to submit a proforma to the Education Funding Agency (EFA) by 31st October 2013, outlining how the LA plans to fund county schools from 2014/15.

A report to the Schools Forum on 26th June 2013 explained the DfE's latest reforms; repeated the principles that the LA was once again minded to adopt, and; asked for the Schools Forum's views on the LA's provisional ideas for dealing with issues raised by the DfE.

Recent work

Since that meeting of the Schools Forum, the LA has:

- Consulted all schools (5th September to 19th September);
- Consulted the Children and Young People's Scrutiny Committee (6th September); and
- Consulted a working group of Schools Forum representatives¹ (24th September).

Once again, due to the DfE's tight timescales for the completion of this work, the consultation with schools had to be conducted in a relatively short period of time. However, in anticipation of that, the LA forewarned schools on the 12th July that the consultation would take place from the 5th September. The response rate to the consultation was disappointing and lower than last year (12% of primary and secondary schools responded).²

The LA set out 8 questions in the consultation document. These are shown in Appendix 2, together with the percentage of schools in favour or against, and an outline of the key comments that emerged. All of this information was considered by the working group on 24th September and their conclusions are also shown. Taking in to account all of the feedback, Appendix 2 sets out the LA's current proposals for consideration by the Schools Forum.

It is clear from this recent work and Appendix 2, that once again the majority of schools that responded support the LA's proposals. Furthermore, having reviewed the schools' responses and considered the issues again, each proposal was supported by a large majority of the working group. The LA's proposals set out in this document are therefore unchanged from the proposals presented to all schools on 5th September.

Next steps

As stated above, a critical milestone in this process is the submission of a proforma to the EFA on 31 October 2013, setting out the LA's proposals for the future funding of schools.

The views of the Schools Forum will be considered by Children's Services Directorate Management Team and the Executive member, Cllr Mrs Bradwell. A report will then be drafted for Cllr Mrs Bradwell to approve formally the LA's proposals for the future funding of schools. That report will be considered by the Children and Young People's Scrutiny Committee on 18th October. The LA will then be in a position to meet the DfE's requirement to submit the proforma by the 31st October.

Thereafter, the data from the October schools census will be cleansed. The DfE should then publish the Dedicated Schools Grant for 2014/15 by December 2013. On 15th January 2014, the LA will consult the Schools Forum on the size of the central DSG budgets for 2014/15 and that will enable the LA to fine tune the values to be allocated through each formula factor next year. A revised proforma will then be issued to the DfE in mid January 2014. After that work is complete, the LA will

¹ Members of the Working Group are shown at Appendix 1.

² 28 (10%) primaries and 10 (19%) secondary schools responded. Other sectors were not expected to respond as this consultation is likely to have little or no impact upon them.

begin to calculate the budget shares for individual schools for the 2014/15 financial year and details will be published in mid February 2014.

Relevant members of the Schools Forum are required to decide whether to agree to the de-delegation of a number of budgets for 2014/15. It would be helpful for the LA's planning purposes for those decisions to be made at this meeting, rather than the meeting in January 2014. The budgets that require consideration are set out in Appendix 3, together with brief background to the decisions made for 2013/14 and information on the use of those budgets.

RECOMMENDATIONS

The Schools Forum is asked to:

- a. Note the contents of the report;
- b. Consider the feedback from the consultation with schools and the working group;
- c. Approve the LA's proposals for the future funding of schools.

Maintained primary and secondary school representatives on the Schools Forum are asked to:

- a. support the proposals for de-delegation of the budgets outlined in Appendix 3.

APPENDICES (If applicable) - these are listed below and attached at the back of the report.
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<p>Appendix 1 - A list of members of the working group held on the 24 September 2013</p> <p>Appendix 2 - Consultation questions and responses</p> <p>Appendix 3 – De-delegation of budgets for maintained schools 2014/15</p> <p>Appendix 4 - Intervention budget and Interim headteachers budget</p>

BACKGROUND PAPERS

PAPER TYPE	TITLE	DATE	ACCESSIBILITY
Report to Schools Forum	School Funding Reform: Findings from the Review of 2013/14 & Arrangements and changes for 2014/15	26 June 2013	County Offices, Newland, Lincoln, LN1 1YQ

MEMBERS OF THE WORKING GROUP HELD ON THE 24th SEPTEMBER 2013

The LA would like to thank the following for their contribution to the development of the proposals set out in this report.

Name	Organisation	Role
John Beswick	Stickney CoE primary school	Governor
Prof. Ken Durrands	Grantham Kings Grammar school	Governor
Michael Follows MBE	Boston John Fielding special school	Governor
Vicky Cook	Welbourn Church of England Primary School	Headteacher
Patricia Ruff	Dunholme St Chad's Primary School	Headteacher
Simon Hardy	Faith schools	Representative
Ellenor Beighton	Market Rasen De Aston secondary school	Headteacher
Jenny Wheeldon	Scothern primary school	Headteacher
Keith Batty	CfBT	Assistant Director
Tim Culpin	CfBT	Head of School Improvement
David Bennett	Horncastle Queen Elizabeth Grammar School	Governor
Dave Thompson	Teaching and Learning Centre	Headteacher
Roger Hale	Caistor Grammar school	Headteacher
Elizabeth Bowes	Mouchel Schools Finance Team	Team Leader
Julie Hulme	Mouchel Schools Finance Team	Senior Accountant
Michelle Grady	LCC	Assistant Head of Finance
Mark Popplewell	LCC	Assistant Head of Finance
Tony Warnock	LCC	Head of Finance

CONSULTATION QUESTIONS AND RESPONSES

PRIMARY AND SECONDARY SCHOOLS

Note: the Children and Young People's Scrutiny Committee was supportive of the LA's proposals, as set out in the consultation with schools, and looked forward to receiving feedback from the consultation at its meeting in October 2013.

Consultation question	School responses	Schools' comments	Working group response	The LA's latest proposal
Q1 Do you agree that the secondary school lump sum should be increased to £0.175m?	<p>Primary: Yes – 82% No – 18%</p> <p>Secondary: Yes – 80% No – 20%</p> <p>This question is relevant to the secondary sector.</p>	<p>There were few comments. Clearly, primary schools were generally supportive and the only concern centred on the impact upon primary school budgets (note: there will be no impact). Mixed views were expressed by secondary schools. One supported the protection of small schools whilst another questioned the educational opportunities for pupils in small secondary schools.</p>	<p>A detailed discussion took place. The challenges faced by some secondary schools and the LA's strategic approach to this were discussed.</p> <p>The working group unanimously supported the LA's proposal.</p>	<p>The LA proposes to increase the secondary school block allocation to £0.175m, with that being funded from the secondary sector's age weighted pupil unit value.</p> <p>This marks a partial reversal of the change made for 2013/14. One again, the minimum funding guarantee will continue to offer protection to schools.</p>
Q2 Do you agree that the sparsity factor should not be introduced in the primary sector?	<p>Primary: Yes – 75% No – 25%</p> <p>Secondary: Yes – 90% No – 10%</p> <p>This question is relevant to the primary sector.</p>	<p>There were few comments. No common concerns were cited.</p>	<p>The working group unanimously supported the LA's proposal.</p>	<p>The LA does not propose to introduce this factor and therefore there will be no impact upon school budgets.</p>
Q3 Do you agree that the sparsity	<p>Primary: Yes – 75%</p>	<p>There were very few comments.</p>	<p>One member suggested that a more</p>	<p>The LA proposes to introduce a sparsity factor for secondary schools. This will be set at a rate of</p>

<p>factor should be introduced for secondary schools at a rate of £0.1m per school, and without tapering?</p>	<p>No – 25%</p> <p>Secondary: Yes – 60% No – 40%</p> <p>This question is relevant to the secondary sector.</p>		<p>strategic approach to small secondary schools was necessary.</p> <p>The working group supported the LA's proposal. One member of the Schools Forum voted against.</p>	<p>£0.1m per school and operate without tapering.</p> <p>This will be funded from the age weighted pupil unit value in the secondary sector.</p> <p>Like the proposed increase in the lump sum factor (see above), this will partially offset the loss in funding suffered by some small secondary schools in 2013/14. Unfortunately, not all small secondary schools will benefit due to the DfE's qualifying criteria (i.e. a school must have < 600 pupils on roll and an average sparsity distance of > 3 miles).</p>
<p>Q4 Do you agree that the LA should not introduce a factor to support schools with falling rolls?</p>	<p>Primary: Yes – 75% No – 25%</p> <p>Secondary: Yes – 100% No – 0%</p> <p>This question is more relevant to the secondary sector at present.</p>	<p>There were few comments that dissented from the LA's proposal. One primary school suggested that the difficulties outlined in the consultation regarding subjectivity of funding allocations could be overcome. Two secondary schools objected to the DfE's exclusion from this funding of schools that are not assessed by OFSTED to be good or outstanding.</p>	<p>The working group recognised the significant impact falling rolls were having on some small secondary schools, but concluded that the introduction of this factor could not solve these complex situations. The LA's approach to these issues was outlined.</p> <p>The working group unanimously supported the LA's proposal.</p>	<p>The LA does not propose to introduce this factor and therefore there will be no impact upon school funding.</p>
<p>Q5 Do you agree that the LA should seek to maintain the same overall level of funding for low</p>	<p>Primary: Yes – 100% No – 0%</p> <p>Secondary: Yes – 80%</p>	<p>There were very few comments. No common concerns were cited.</p>	<p>The working group acknowledged that the LA's funding of SEN is a little above the national average and that there is no</p>	<p>The LA proposes to maintain the current level of low cost, high incidence SEN funding in the secondary sector. Although more pupils will qualify for funding due to the DfE's amendment to the qualifying criteria (i.e. those that do not attain the expected level at Key Stage 2 in English or Maths)</p>

cost, high incidence SEN to ensure stability in funding, rather than re-direct more funding into this factor from other pupil-led factors?	No – 20% This question is relevant to the secondary sector.		justification at this time for increasing the funding distributed through this factor. The working group unanimously supported the LA's proposal.	the impact upon individual secondary schools should be very modest indeed.
Q6 Do you agree that the LA should not introduce a factor for pupil mobility?	Primary: Yes – 82% No – 18% Secondary: Yes – 100% No – 0%	There were a few comments from primary schools, but mixed views were expressed. Some schools felt that the impact of pupil mobility was not recognised by the LA. By contrast, one school stated that these children attract the pupil premium and another recognised that the DfE's proposed use of October census information would severely undermine the effectiveness of this factor.	The working group acknowledged that the sums that would be allocated to schools would not be material and so the introduction of this factor would run counter to the government's vision for a simplified funding formula. The working group unanimously supported the LA's proposal.	The LA does not propose to introduce this factor and therefore there will be no impact upon school budgets.
Q7 Do you agree that a factor for Looked After Children should be introduced in primary and secondary schools in 2014/15?	Primary: Yes – 79% No – 21% Secondary: Yes – 90% No – 10%	There were few comments. Those against the proposal suggested that the pupil premium should provide sufficient funding.	The working group concluded that the impact of this funding should be monitored; good practice guidance should be issued to schools; a protocol should be agreed between schools to allow the	The LA proposes to introduce this factor. Funding released from the unwinding of transitional protection arrangements this year can be used to finance this additional cost, so there should be no negative impact upon schools' existing budgets.

			funding to follow pupils mid year, and; the funding should be used to enable LAC to access education, as some don't attend school.	
Q8 Do you agree that the funding for the Looked After Children factor should be set at £1,200 per pupil?	<p>Primary: Yes – 79% No – 21%</p> <p>Secondary: Yes – 90% No – 10%</p>	There were a few comments. These were mixed and there was no common theme.	The working group considered the sum proposed was reasonable and acknowledged that it would be for each school to determine how best to deploy the additional resource.	The LA proposes to set the rate at £1,200. As indicated above, the funding released from the unwinding of transitional protection arrangements this year can be used to finance this additional cost, so there should be no negative impact upon schools' existing budgets.

DE-DELEGATION OF BUDGETS FOR MAINTAINED SCHOOLS 2014/15

As reported previously, the DfE funding reforms for 2013/14 required LAs to delegate more budgets to schools. However, they also permitted the de-delegation of some services.

In October 2012, the maintained schools representatives for the primary sector and the maintained school representatives from the secondary sector voted on whether to permit the de-delegation of a number of budgets.

The maintained primary school representatives voted to support de-delegation of the budgets for schools in financial difficulty and exceptional unforeseen costs, equality for minority communities, criminal records bureau and union activities. For the reasons explained below, the LA is proposing the de-delegation of the budgets in Table 1 only, for 2014/15. The proposed per pupil amounts are similar to the amounts for 2013/14, but the total budgets returned are expected to be c.5.5% lower than 2013/14 due to an increase in the number of schools that have converted to academies.

Table 1 – Primary maintained schools

Service	Total budget £m	De-delegation amount per pupil £
Schools in financial difficulty and exceptional unforeseen costs	1.229	35.37 ³
Equality for Minority Communities	0.173	4.99

Noted: The decision to de-delegate the funding for equality for minority communities next year, was made by maintained primary school representatives in June 2013.

³ This comprises: school intervention @ £10.88 per pupil (£0.378m); interim headteachers @ £11.32 per pupil (£0.393m), and; schools in financial difficulty @ £13.17 (£0.457m)

For 2013/14, the maintained secondary school representatives voted to support the de-delegation of budgets for equality for minority communities and criminal records bureau. For the reasons explained below, the LA is proposing the de-delegation of the budgets in Table 2 only, for 2014/15. The proposed per pupil amount is similar to 2013/14, but the total budget returned is expected to be c.15% lower than 2013/14 due to an increase in the number of schools that have converted to academies.

Table 2 – Secondary maintained schools

Service	Total budget £m	De-delegation amount per pupil £
Equality for Minority Communities	0.007	1.00

The Schools Forum is asked to note the following points:

1. Schools in financial difficulty and exceptional unforeseen costs

The DfE reforms no longer permit the LA to hold a budget for school redundancies. For 2013/14, Schools Forum representatives of maintained primary schools voted to create a budget for schools in financial difficulty. The LA's Staffing Reduction panel continues to meet to consider requests for redundancies and access to those funds. The LA's long established policy of charging schools for a share of redundancy costs remains in place. However, a tightening of those arrangements was introduced in 2013/14, such that a contribution from this budget will only be made for schools that are likely to overspend within the next two financial years if no action is taken. The costs incurred against this budget in 2013/14 have been low so far, but it would be prudent to continue to set aside funds each year. As indicated below, any unspent funds at the end of each year will be earmarked for the benefit of the maintained schools in that sector only. A budget for this was not de-delegated for maintained secondary schools in 2013/14. That was mainly because there are relatively few maintained secondary schools; several of them are unlikely to fall in to financial difficulty and so would probably not be supportive of retaining a budget, and; there would not therefore be the critical mass to operate an effective insurance type funding model, as can be applied in the primary sector.

The DfE intends the budget for exceptional unforeseen costs, if established, to finance costs which it would be unreasonable to expect governing bodies to meet. More specifically, the 2013/14 budget was created to finance the long established school intervention work undertaken by CfBT and the provision of interim head-teachers. So, as reported in the consultation exercise last year, the funding is used to: support schools that have issues raised via the LA's Schools Causing Concern process or OFSTED inspections, and; to appoint interim headteachers when school leaders are absent or posts remain vacant. Without such funding, many primary schools would be unable to address critical issues in a timely manner and that could have a damaging impact upon the outcomes for the pupils in those schools. Further detail on the use of the funds this year is set in Appendix 4. A budget was not de-delegated for maintained secondary schools in 2013/14, for similar reasons to those explained in the paragraph above.

2. Disclosure and Barring Service (formerly Criminal Records Bureau (CRB))

The de-delegation of the CRB budget in 2013/14 enabled the existing service to continue and avoided the bureaucracy of charging individual schools for the admin costs. In June 2013, the Disclosure and Barring Service commenced the Single Certificate and Online Monitoring service. This was introduced at very short notice and affects the current charging process and the approach to clearances for schools. The current charging process, as agreed by Schools Forum, is as follows: secondary maintained schools are charged 100% of the costs, whilst primary maintained schools have de-delegated a portion of the budget back to the LA which covers the admin charge for each DBS application. This is £13.75 per application. Schools are then charged the DBS charge of £44 per application. The total cost is therefore £57.75 per application. The LA is currently considering various options in relation to the online monitoring service and any developments on that will be reported to schools. It is proposed that for simplification purposes, the LA does not de-delegate the admin costs in 2014/15 and, instead, schools will be charged the full cost including the admin element. The impact of this on schools overall should be neutral - the costs will simply be paid for in full by schools, rather than the admin element being funded by de-delegation of part of their budget.

3. Union activities

The DfE's school funding reforms for 2013/14 required LAs to delegate the budget for union activities to all schools. As permitted, the LA asked the Schools Forum representatives of maintained schools if they wished to de-delegate their share of the funds. The Schools Forum's maintained primary school representatives voted in favour; the secondary maintained representatives voted against. Irrespective of those decisions, it was inevitable that the funds available for union activities would be significantly reduced without some form of buy-back arrangement with academies. It could be argued that the DfE's requirement to delegate this particular budget is unfair, in the sense that many academies are likely to gain from the LA's positive relationships with the trade unions which only maintained schools are funding. The budget provides core funding to a number of the recognised trade unions for schools, to enable positive working relationships and effective consultation and negotiations to take place at a local level through the Council. This has enabled the Council to consult on school employment policy changes and it has supported the implementation of the workforce remodelling agenda on behalf of schools. It has helped ensure that schools met part of their statutory duty to provide paid time off for trade union duties regarding consultation, as this was undertaken by the regional representatives of these trade unions rather than individual school representatives. It is important to note that last year's decision not to de-delegate funds does not negate individual schools of their responsibilities as outlined in the Industrial Relations Policy in the School Employment Manual, which maintained schools are expected to adopt alongside the ACAS Code of Practice on Trade Union Duties and Activities. The policy provides for approved paid time off for trade union duties for any recognised trade union representatives on a school site in line with the statutory requirements of the Trade Union and Labour Relations (Consolidation) Act 1992, and the ACAS Code describes what constitutes a trade union 'duty' and 'activity'. There may be further developments on this matter before the start of the 2014/15 financial year and, if so, further information will be brought to the Schools Forum meeting in January 2014. Due to the unfairness of the current system, the LA does not at this time propose to seek the de-delegation of funds in 2014/15 for union activities.

4. Equality for Minority Communities

This budget provides funding to support schools and pupils from ethnic minorities and other groups. At the Schools Forum meeting on 26th June 2013, John O'Connor presented a report and the maintained primary school representatives voted to support the de-delegation of funds for the Equality for Minority Communities service for 2014/15.

Please note:

1. Only maintained schools can have funds de-delegated. Academies will therefore receive a share of the delegated budget within their budget share each year. As de-delegation does not affect academies, academy representatives on the Schools Forum are not entitled to vote on these issues.
2. The decision to de-delegate funds for maintained schools should be considered and voted upon separately by each sector.
3. It is presumed that where there are no maintained school representatives for a particular sector on the Schools Forum, a decision to de-delegate cannot be made and therefore no de-delegation of funds can take place.
4. As stated above, with the conversion of a few more schools to academies since 31st March 2013, the total amount secured for services through de-delegation will reduce if the per pupil deduction remains unchanged from the 2013/14 level.
5. Where budgets are de-delegated for maintained schools, any underspendings arising at the end of the financial year will be earmarked for the benefit only of the maintained schools in that sector.
6. At its meeting in January 2014, the Schools Forum will be consulted on any major changes to central DSG budgets for 2014/15. It is important that realistic budgets are set using the most up-to-date information, so the LA considers it appropriate to make decisions on those issues at that time.

Questions for Maintained primary school representatives:

Q1 Do you agree that for 2014/15, the LA should retain funding for 'Schools in financial difficulty and exceptional unforeseen costs' in primary schools (i.e. to help deal with redundancy costs, school intervention and provision of interim head-teachers), applying the same per pupil rate as for 2013/14?

Questions for Maintained secondary school representatives:

Q1 Do you agree that for 2014/15, the LA should retain funding for Equality for Minority Communities in secondary schools, applying the same per pupil rate as for 2013/14?

Intervention budget

The intervention budget has been used to support and challenge those primary maintained schools graded as satisfactory or requiring improvement by OfSTED. In September 2012, 81 maintained primary schools in Lincolnshire were judged to be satisfactory. During the 2012/13 academic year 61 of these schools were inspected and 37 were judged to be good or better. This means that 79% of maintained primary schools are now good or better, the highest amount ever achieved in Lincolnshire, an increase of 15% in a year. No schools were placed in a category. When you consider that in 1 week, 5 schools in Norfolk were placed in a category it shows how successful Lincolnshire has been.

The intervention budget has allowed CfBT Education Services to focus on supporting satisfactory schools where needed. The sort of activities provided have been broad and varied and in line with the schools' needs. They include:

- Enhanced Education Adviser allocation to provide regular support and challenge for senior leaders
- Whole school teaching and learning and leadership and management reviews to support school leaders in identifying key barriers to improvement and agreeing specific actions to address issues
- Assistance with completion of key school improvement and self-evaluation documentation
- Detailed analysis of school data – published data and internal pupil tracking – so that a school has an accurate view of performance against national and local benchmarks
- SEND health check undertaken where concerns identified over progress of vulnerable groups; support to SENCo in completing relevant documentation and effective in-school provision
- Assistance in completing relevant CPD audit and agreeing CPD plan to ensure staff have competencies to address areas for development and overcome underperformance in teaching and learning; relevant support brokered for all school staff
- CPD for non-teaching/ support staff to ensure their contribution to school improvement
- Assistance in designing focused monitoring and evaluation programmes to ensure actions undertaken are having expected impact
- Undertaking paired monitoring activities with senior and middle leaders to ensure self-evaluation is accurate and outcomes contribute to school self-review and further school improvement priorities
- Provide support in setting out staff performance management/ appraisal ensuring objectives are correctly focused on pupil outcomes
- Attendance at SLT meetings to model high quality evaluative discussion
- Provision of consultant support for subject leaders to ensure accurate depth of subject knowledge and quality of school curriculum
- Governor training and attendance at governor meetings so that governors are effective in their duties and make good contribution to strategic drive
- Ensure all key staff have a working knowledge of the expectations of the OfSTED framework and are prepared for future HMI/ section 5 visits

OfSTED have been very complimentary of the support provided by CfBT Education Services. Comments include:

The school has received good support from the local authority education adviser. Work has included undertaking a review of data, joint lesson observations and support for the governing body.

(Boston St Nicholas Church of England Primary School)

The school has made good use of the expertise from the local authority which has been helpful in raising the quality of teaching and learning. Regular meetings of local authority representatives with senior staff provide valuable data on pupils' progress and clear priorities for the future.

(Hemswell Cliff Primary School)

Strong support provided by the local authority has galvanised improvements and identified priorities are now ably managed within the school.

(Caythorpe Primary School)

Supporting those schools that have been judged requiring improvement has also been a key role during the year. 26 schools have been judged as RI. HMI visits to such schools are very similar to monitoring visits to schools in Special Measures. The Education Services has been able to support in this process. Once again HMI have been very complimentary and have used our school improvement plans as models for other local authorities.

There is however still a way to go before all schools are judged to be good or better. 20 maintained primary schools remain satisfactory and will almost certainly be inspected this year. It is important that these schools continue to receive the successful support that the satisfactory schools have received to date.

All of the RI schools are likely to receive up to three visits from HMI this year and they have a very limited time to move to a judgement of Good. Of the 26 RI schools, 24 were previously judged to be satisfactory and were unable to move to Good at their last inspection despite the additional support provided. For these schools in particular, it is imperative that CfBT Education Services continues to provide the support that is given to Satisfactory schools, with additional, intensive intervention to address the issues within the timescales set by HMI. To support their move to Good we intend to:

- Continue with all of the things we have done previously (as above)
- Offer enhanced adviser allocation in addition to the core offer
- Work with school leaders of these schools to develop accurate self-evaluation documentation with well planned strategies for improvement
- Work with senior leaders to strengthen school leadership and sustained capacity to improve
- Support school leaders in identifying appropriate and timely CPD for class teachers who are identified as yet to be consistently good or better
- Offer school reviews for governors so that governors have an accurate view of where they need to build further strengths
- Offer reviews of spending of Pupil Premium funding where gaps in performance have been identified.

We are hopeful that some funding will be provided by the National College to support the work of LLEs/NLEs but this is likely to be small so will have a limited impact on schools. A continuation of the intervention funding will ensure that appropriate support and challenge can be provided to

those schools that require it. The amount can be reduced in line with the number of pupils that are now taught in schools that have converted to academy status in the last 12 months.

We will continue to work closely with all partners including the DfE, NCTL and the Diocese to ensure that all Lincolnshire pupils receive a good education.

Interim Headteacher's Budget

This budget has been used to pay the salaries of the team of Interim Headteachers (IHT). These experienced and highly skilled headteachers have been placed in primary schools to cover short and long term absences of headteachers. This is how the majority of their time is used. The skills and expertise of the team is also used to support other leaders within Lincolnshire maintained schools through coaching, mentoring and running courses. This has led to even greater impact across the county.

Interim Headships

This is to cover long or short term absences in primary schools where there is no viable alternative leadership solution. The schools are usually those graded by OfSTED as satisfactory/requires improvement or inadequate or those that are deemed to be vulnerable should effective leadership not be in place. Schools provided with the services of an Interim Head are charged for the number of working days provided at the rate of pay of their substantive head.

During the year the team have worked in a variety of schools in different, but always challenging circumstances. A clear remit is agreed with the school which identifies specific priorities. At the end of the placement the governors are asked to evaluate the performance of the IHT. The following are a reflection of the overwhelming positive comments received:

The IHT has done a phenomenal job at the School and the Governing Body, parents, staff and children owe her a debt of gratitude. She has provided clear but collaborative leadership and has delivered a clear road map for the School to continue its journey to excellence.

The IHT provided an excellent service to both schools in the federation during my absence – she continued the work of school improvement and has left us well placed to face the coming inspection. Her ongoing support and advice since my return has been similarly invaluable. I cannot praise her or thank her enough.

When OfSTED or HMI have visited placement schools they have been equally complimentary:

The local authority provided very effective support when leadership and the quality of teaching became fragile at the time of the section 5 inspection. They immediately provided a strong seconded headteacher to stabilise the school and to introduce essential improvements.

'The interim headteacher's good leadership of teaching, together with effective performance management and well-focused professional development, is enabling staff to improve their teaching skills and accelerate pupils' progress.'

'The school draws on the local authority for external support in a number of ways. The local authority was quick to provide an interim headteacher with the experience and skills needed to continue to move the school forward'

School Leadership Support

Provided to executive heads, headteachers and acting heads, in a variety of circumstances, though particularly those in schools graded by OfSTED as satisfactory/requires improvement or those deemed to be vulnerable or at a time of crisis. These may be established leaders, those new to headship or those in acting roles. The support provided is tailored to the needs of the school and the leadership team, and aims to enhance the skills of the school leadership to provide sustainable improvement by building capacity.

The Excellence in Leadership Programme has been extremely successful with satisfactory schools with well over the Lincolnshire average moving to a good judgement. The mentoring and coaching can mean that an IHT is not needed at a later date.

Leadership Programmes and Conferences

Interim Headteachers participate in various leadership programmes from middle leaders and those aspiring to headship, to those who are new in headship roles and beyond. These programmes have proved to be invaluable in ensuring that there remains a pool of appropriately trained and skilled leaders within the county at a time when recruitment to leadership roles is increasingly challenging. The Interim Headteachers can use their experience working in a variety of schools to mentor and coach other leaders. At the recent Leadership Induction Programme for newly appointed Heads 100% of the evaluations were good or better.

There is a continued need for the Interim Headteacher Team funded by the Local Authority.

Although the performance of primary schools in Lincolnshire in terms of OfSTED grades continues to improve at a rapid rate there are still many issues to tackle. There are no maintained primary schools in a category at present but there are still 20 graded as satisfactory and 26 as requiring improvement. Those that are requiring improvement are placed under extreme pressure through monitoring visits by HMI similar to those schools judged as requiring Special Measures. This can take its toll on the health of the headteachers.

With over 200 primary schools still maintained by the local authority there will also be a number of occasions where headteachers will be absent and there will not be an adequate replacement within the school. This can leave a school very vulnerable. This is often more likely because of the number of small schools who do not have enough staffing to allow an adequate replacement for the Headteacher.

Over 40 maintained primary schools in Lincolnshire appointed new headteachers last year. Nationally schools found it very difficult to recruit headteachers. The fact that Lincolnshire was so successful was partly due to the IHTs contribution to the training of leaders within the county.

We continue to work closely with our partners to find alternative solutions and will try to broker solutions with local leaders but there is still a need for other arrangements on many occasions. The amount needed for the Interim Headteachers should be reduced in line with the number of pupils that are now taught in schools that have now converted to academy status in the last 12 months.

REGULATORY AND OTHER COMMITTEE REPORT

NAME OF COMMITTEE:	Schools Forum
DATE OF MEETING:	9 October 2013
SUBJECT:	Revised Schools Budget 2013/14
REPORT BY:	Tony Warnock (Head of Finance – Children’s and Specialist Services)
NAME OF CONTACT OFFICER:	Tony Warnock
CONTACT OFFICER TEL NO:	01522 553250
CONTACT OFFICER EMAIL ADDRESS:	tony.warnock@lincolnshire.gov.uk
IS REPORT CONFIDENTIAL?	No

SUMMARY

The purpose of this report is to notify the Schools Forum of the revised Schools Budget for 2013/14 and to seek support for the proposed use of the underspending from 2012/13.

DISCUSSION

Introduction

The Dedicated Schools Grant (DSG) is a ring-fenced grant that can only be spent for the purposes outlined in the DfE’s regulations. A revision to the Schools Budget is necessary each year to reflect the under or overspending arising on the DSG in the previous financial year. In previous years, such reports also had to consider the adjustment to the DSG once the final figure was confirmed. However, the DfE’s 2013/14 school funding reforms now use the October schools census and so the size of the DSG is confirmed before the start of the financial year. Under DfE’ regulations,

underspendings are carried forward automatically to the following financial year and the LA must consult with the Schools Forum over its plans to utilise underspendings, or address overspendings.

The carry forward for 2011/12

The Schools Forum will recall that last year's report highlighted:

- A total underspending on the DSG at 31 March 2012 of £24.948m.
- Commitments against that sum totaling £15.510m.
- Proposed developments of £2.5m.
- A recommendation that the balance of the underspending be distributed to all schools using the DfE's formula for Devolved Capital.

The proposals were supported by the Schools Forum and, as a consequence, £7m was distributed to schools mid-year.

The carry forward for 2012/13

In total, the underspending carried forward at 31 March 2012 was **£16.688m** (equivalent to 3.5% of the current DSG).

Included within this figure was an underspending of £3.345m on the 2012/13 centrally managed DSG budgets. The main underspendings are set out in Appendix 1. They have arisen due to the LA's prudent management of the budgets and its ongoing strategy of utilising all other available funds before the DSG.

Existing commitments

The current commitments total **£9.550m**. They are summarised in Appendix 2. Some of the commitments are difficult to predict accurately and so for reasons explained later in this report, a prudent estimate of those has been made.

Proposed developments

The LA has no plans to use the underspending from last year to finance new developments.

Proposals for use of the uncommitted sum

It is critical that the LA acts prudently to avoid overspending the DSG. There are several areas of significant uncertainty regarding the current year's budgets. These include:

- The need to finance the revenue costs for the on-going and significant demographic growth in the primary sector, including for many expansions and several new schools.
- The potential costs of major school re-organisations.
- The Learners with Learning Difficulties or Disabilities (LLDD) placements budget for which the LA first became responsible this year.
- Growth in the funding provided to the Private Voluntary & Independent (PVI) sector for the free early years entitlement. This is a demand-led budget which cannot be controlled. Inward migration and the potential for parents to take up more of their 15 hours per week entitlement are key but unpredictable variables, and there has been significant growth in the summer term of 2013.

In view of these and other uncertainties, it is therefore proposed that **£3m** of the DSG underspending for last year is set aside until the position becomes clearer.

The LA recognises that any uncommitted DSG funds should be put to good use and should not be retained indefinitely. The LA therefore proposes to distribute the remaining balance (c.**£4m**) to schools. The LA proposes to distribute that funding through the approved funding formula, but in a way that once again mirrors the DfE's Devolved Formula Capital (DfC) distribution mechanism, i.e.

A lump sum of £4,000 per school

Per pupil allocations of:

Primary:	£11.25
Secondary:	£16.88
Special:	£33.75

The rationale for this proposal is the same as last year:

- In the Government's four year Comprehensive Spending Review of 2010, schools' revenue funding was projected to increase by 13% (due to demographic growth and the pupil premium) but there was a very significant reduction in DfC allocations to schools of c.75%.
- DfC remains extremely important to schools because it needs to fund the growing demands for investment in schools I.T. equipment.
- There remains a need for significant investment in minor capital repairs and maintenance in many schools across the county. The fabric of the buildings needs to be maintained.
- There is limited money available through the LA's capital repairs and maintenance budget to finance such work and following the CSR in 2010, the Council's non DSG budgets are under tremendous and increasing pressure.
- Schools may be inclined to squeeze their own revenue repairs and maintenance budgets in future years as finances tighten.
- The DSG underspending is a one-off sum of money and there will be less risk of schools making permanent additions to their revenue base budgets, and creating financial problems in the medium term, if the funding is earmarked as being for DfC type purposes.
- There remain a number of local investment opportunities available to schools in solar and other carbon efficient technologies which will generate savings and help to reduce pressure on schools' future revenue budgets.
- Maintained schools' reserves are large and have been increasing significantly in recent years. More schools are already carrying forward more than the 5% or 8% level prescribed under the LA's policy. It therefore seems sensible to avoid simply adding to their reserves. Distributing the funds via a DfC mechanism is more likely to result in that funding being spent soon for the benefit of pupils.
- The DSG is used to finance and support all schools. As this approach will deliver funding to all schools (including academies), compared to proposals that target funding at specific projects, it is likely to command a broader level of support across all types of schools.

The LA therefore proposes to allocate £4m of uncommitted funds to schools using the formula for devolved capital, with both the block and per pupil elements recorded above being uplifted by the same percentage.

Should this proposal be supported by the Schools Forum, it is not presently clear when those funds will be allocated to schools. Last year, the funds were distributed mid-year. However, the DfE's school funding reforms for 2013/14 may prevent that. The reforms are designed to simplify school funding arrangements and the DfE believes it can achieve that, in part, by limiting the number of in-year adjustments that are made by LAs to schools. However, it appears from recent correspondence that the DfE recognises that its position on this matter is unclear and so it is reconsidering this. Having said that, even if the DfE advises that LAs cannot issue such funds mid year, the LA could still notify each school of the funds that will be made available on 1st April 2014. This would still enable schools to develop their plans for use of those funds and it will probably not delay developments for too long.

As happened last year, it will be necessary for the LA to first obtain the DfE's prior approval to exclude these payments from the Minimum Funding Guarantee (MFG) in future years. This is a one-off sum of money and so cannot be sustained beyond one year - the proposed payments cannot become locked in by the guarantee. That would be nonsensical and so the LA remains confident that the DfE will once again approve this as an exception when the LA applies the MFG.

If payments are made to school budgets mid-year, they are very likely to affect maintained schools' carry forwards once again. To help ensure that this funding is spent sensibly and in a carefully planned way, the LA will adopt the same approach as for 2012/13, and exclude such sums when determining whether a school has exceeded the LA's carry forward limit.

Looking ahead, it may be that such in-year allocations are repeated in future years. The LA recognises that whilst the allocation of one-off funds will be welcomed by schools, they would prefer for planning purposes for such funding to be allocated in the base budget and at the start of each financial year. However, that is simply not possible. As indicated above, these are one-off funds and so can't be added to schools' base budgets. Also, there are now fewer centrally held DSG budgets and the

prospect is that DSG underspendings in future years will be much lower than they have been in the recent past. In addition, there remain a number of highly volatile and unpredictable budgets which must continue to be set prudently.

In future, prudent budget setting will be even more important because the DfE's new regulations now give Schools Forums the power to decide whether DSG overspends are to be carried forward to the following financial year. With mounting pressure ahead on non-DSG budgets, the LA could not afford to finance a deficit on the DSG. The LA therefore proposes to continue setting prudent budgets at the start of the financial year and, if there is an uncommitted underspend at the end of the year, consideration can be given to distributing it to schools in this way. Schools must not, however, come to rely on such funding, as it cannot be guaranteed every year.

RECOMMENDATIONS

The Schools Forum is asked to:

- a. Note the contents of the report;
- b. Support the LA's proposals for use of the 2012/13 DSG underspending.

The views of the Schools Forum will be reported to the DMT and Lead Executive member before final decisions are made.

APPENDICES (If applicable) - these are listed below and attached at the back of the report.
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Appendix 1 - Central DSG Budgets 2012/13 – Explanations for major underspendings
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Appendix 2 – 2013/14 DSG commitments

BACKGROUND PAPERS			
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PAPER TYPE	TITLE	DATE	ACCESSIBILITY
Report to Schools Forum	Revised Schools Budget 2012/13	10 July 2012	County Offices, Newland, Lincoln, LN1 1YQ

Central DSG Budgets 2012/13 – Explanations for major underspendings

The main underspendings were:

No.	Service / reason for underspend	Underspend
1	Early Years – PVI free entitlement The underspending arose because the growth in both the number of children accessing the provision and hours taken up were less than forecast.	£1.430m
2	Nursery Classes funding formula As above	£0.759m
3	Nursery Schools funding formula As above	£0.624m
4	Pupil Referral Unit The underspending was largely due to staff vacancies.	£0.198m
5	Early Years Staffing This underspending was due to vacancies in the Birth to Five service.	£0.177m
6	LAC Education Support This underspending was due to the number of hours tuition provided being less than forecast	£0.157m
	Total	£3.345m

2013/14 DSG commitments

	Service / Budget	Commitment £m
1	Broadband This is to finance the residual costs from the migration to the new broadband contract.	0.336
2	Various school development and support projects This is the balance of funding for various projects, including those previously referred to under the heading 'Baccalaureate', the special schools outreach programme, and work on KS2 moderation, etc	1.992
3	School re-organisations, including new schools, closures These are commitments for various historic school reorganisations and the start-up costs for new primary schools, etc	4.214
4	Carbon management These are commitments for various carbon management projects supported by the Schools Forum last year.	3.008
	Total	9.550

REGULATORY AND OTHER COMMITTEE REPORT

NAME OF COMMITTEE:	Schools Forum
DATE OF MEETING:	9 October 2013
SUBJECT:	Scheme for Financing Schools
REPORT BY:	Tony Warnock Head of Finance – Children’s Services
NAME OF CONTACT OFFICER:	Tony Warnock Head of Finance – Children’s Services
CONTACT OFFICER TEL NO:	01522 553250
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IS THE REPORT EXEMPT?	No
IS REPORT CONFIDENTIAL?	No

SUMMARY

The purpose of this report is to alert the Schools Forum to the latest publication by the DfE of its revised guidance on Schemes for Financing Schools.

DISCUSSION

Background

Schemes for Financing Schools were first introduced under the Schools Standards and Framework Act 1998. The Local Authority (LA) is required to publish a scheme for financing schools. This sets out the financial relationship between the LA and the schools it maintains. Any amendments to schemes must be consulted on with all maintained schools and be approved by the Schools Forum. The Scheme is not relevant to academies. They have their own arrangements with the EFA.

DfE changes

Periodically, the DfE directs LAs to amend their Schemes. The LA has updated the Scheme in those instances and has reported the changes to the Schools Forum. On 26th March 2013, the DfE

directed LAs to make further revisions to the Scheme. Details of the DfE's Scheme guidance are available at:

<http://www.education.gov.uk/schools/adminandfinance/financialmanagement/schoolsrevenuefunding/financeregulations/a0070286/local-authority-schemes-for-financing-schools>

From Lincolnshire's perspective, the most important revisions to the Scheme from 1st April 2013 are:

- The Scheme now applies to Pupil Referral Units.
- Only Schools Forum members representing maintained schools should approve Scheme changes.
- Inclusion of a statement that top-up payments should be made monthly unless agreed otherwise.
- Confirmation that funding to support schools in financial difficulty can only come from a de-delegated contingency for mainstream schools, or a central budget for special schools and PRUs.

The LA's proposed change

The LA also plans to make its own change to the Scheme and that is to require all maintained schools to submit a medium term finance plan (MTFP) to the LA by the 31st May each year. Presently, schools are required by that date to submit a brief budget statement for the new year, outlining how they plan to spend their budget over the 12 month period. However, the LA considers that the financial management of schools would be enhanced by the introduction of this new requirement and the following points have been considered in reaching that view:

- Maintaining a MTFP is critical to effective financial management in schools. It enables schools to: plan effectively for the medium term; make better use of resources, and; reduce the risk of overspending. A MTFP can help ensure that: school reserves are kept within reasonable limits; the need for staffing changes or other budgets reductions are identified early and actions are timed correctly, and; redundancy costs are kept to a minimum, etc.
- All schools are expected to have a MTFP and, indeed, the vast majority of schools have one. The few schools that don't have one are identified through the periodic inspections by the LA's internal audit team and the production of a MTFP is always recommended as a key priority.
- The majority of schools will be familiar with these plans and will have the skills required to update them. Indeed, for more than 15 years, the LA has made available Excel spreadsheets to assist schools with completing their MTFP, and hands-on training has been made available to headteachers and bursars throughout that time. Such training continues to be made available on a regular basis and is free of charge.
- The LA recommends that a school's MTFP should be updated at least twice per year and one of those occasions should be when the annual budget is drafted. This enables the annual budget to be set in the context of the school's medium term financial position. For the LA to request the submission of a MTFP at the same time as the annual budget statement therefore seems eminently sensible.
- The LA will undertake high level check on schools' MTFP and any key points or concerns will be fed back to schools. There is no additional resource available for the LA to undertake this additional work but, given its importance, the finance team will re-prioritise its existing work.

The LA is required to consult the Schools Forum and all maintained schools on this change. Subject to the views expressed by the Schools Forum, the LA plans to do that in the autumn term. Should the requirement for submission of a MTFP subsequently be agreed, it would be introduced for the first time in the 2014/15 financial year, with the first submissions from schools due in by 31 May 2014.

The LA's Scheme has been updated for the DfE's directed revisions and final checks are being made to ensure full compliance with the guidance, ahead of a consultation with schools. The LA will continue to publish the approved Scheme and draw schools' attention to it.

In conclusion, the submission of a MTFP to the LA each year should help strengthen the financial management of schools by requiring all schools to maintain one, and allowing the LA to review them and feed back any key comments or concerns. Given the history of MTFPs within the county, this should not create a significant amount of additional work for schools – the vast majority of schools already have a MTFP and school staff have the skills to update them. A key benefit from this proposal is that schools will gain re-assurance from knowing that finance staff have reviewed their MTFPs. Subject to the Schools Forum's response, the LA proposes to consult all maintained schools on this change, then publish a revised Scheme for circulation to all maintained schools before April 2014.

RECOMMENDATIONS

The maintained school representatives of the Schools Forum are asked to:

- a. note the content of the report
- b. approve, in advance of a consultation with all maintained schools, the LA's proposal for requiring maintained schools to submit a MTFP to the LA by 31st May each year.

BACKGROUND PAPERS

The following reports were relied upon in the writing of this report.

PAPER TYPE	TITLE	DATE	ACCESSIBILITY
Report to Schools Forum	Scheme for Financing Schools	23 January 2011	County Offices, Newland, Lincoln.
DfE's guidance	LA schemes for financing schools	26 March 2013	Please see the web link above

APPENDICES

None

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Agenda Item 6



REGULATORY AND OTHER COMMITTEE REPORT

NAME OF COMMITTEE:	Schools Forum
DATE OF MEETING:	9 October 2013
SUBJECT:	2013/14 Section 251 Benchmarking Information
REPORT BY:	Tony Warnock (Head of Finance – Children’s & Specialist Services)
NAME OF CONTACT OFFICER:	Tony Warnock
CONTACT OFFICER TEL NO:	01522 553250
CONTACT OFFICER EMAIL ADDRESS:	tony.warnock@lincolnshire.gov.uk
IS REPORT CONFIDENTIAL?	No

SUMMARY

The purpose of this report is to share with the Schools Forum the latest s.251 benchmarking data published by the DfE in September 2013.

DISCUSSION

All Local Authorities (LA) are required to publish, prior to the start of the financial year, a statement showing their planned expenditure on Children’s services. Lincolnshire traditionally presents a copy of its s.251 budget statement to the Schools Forum in April each year.

The statement is prescribed by the DfE and requires LAs to set out in a common format their planned spending on children’s services for the forthcoming financial year. This has enabled the DfE to publish since 2003/04, comparative information for LAs and Schools Forum to consider. The latest s.251 benchmarking information was published by the DfE in September 2013 and is available at:

A copy of the benchmarking data from LA Table of s.251 is attached at Appendix 1.

This information is very useful, but it is important to note the following points:

- Following the DfE's school funding reforms for 2013/14, the format of s251 has changed. This will make comparisons with previous years more difficult.
- As is always the case, despite extensive DfE' guidance on how to complete the s251 budget statement, LAs are likely to interpret the guidance differently and that can account for some of the apparent variations in planned spending between LAs.
- Whilst perhaps appropriate, the DfE has used different divisors when calculating the per pupil funding figures. For example, in some cases the DfE has used total pupils aged 3 – 19 for maintained schools only, and in others it has used the total pupils for pupil aged 3 – 19 in maintained schools *and* academies. In many cases, the divisors do not take account of specific cohorts, such as the actual number of early years children placed in independent settings, or the number of children actually transported to and from school, etc. Care is therefore needed when interpreting the figures.
- Variation between LA's spending plans can arise due to differences in approach to delegation of services, or the way that corporate overheads are assigned to budgets.
- The Schools Forum principal role is to focus on the use of the Dedicated Schools Grant, i.e. those lines up to 1.6.1 or Column 36. The other budget lines and columns beyond that will nevertheless be of interest to the Schools Forum, because they support schools and, more broadly, children's services across the county.

This report looks mainly at the 27 Upper Tier authorities (i.e. counties), because they are similar in character to Lincolnshire. The report considers the key subtotals within Appendix 1 and highlights a number of key issues relating to them.

Table 1

Col	Budget line	Lincolnshire's funding per capita £	Upper Tier average funding per capita £	Lincolnshire's rank for Upper Tier authorities	England average (median) per capita £
1	Individual Schools Budget	3,969	4,065	19 th highest	4,312

Comment: This budget line represents the funding delegated to schools, i.e. school budget shares. These figures are not surprising and are directly influenced by the fact that the DSG funding received by Upper Tier LAs from the DfE is the lowest in the country.

Table 2

Col	Budget line	Lincolnshire's funding per capita £	Upper Tier average funding per capita £	Lincolnshire's rank for Upper Tier authorities	England average (median) per capita £
10	De-delegated items	30	30	14 th highest	35

Comment: This budget line represents the funding that was de-delegated from maintained schools. De-delegation was introduced for the first time in 2013/14 as part of the DfE's school funding reforms. It is evident from the figures in Appendix 1 that LAs and Schools Forums across the country have

taken very different approaches. For example, several of the LAs with larger sums have decided to de-delegate insurance. Lincolnshire has not. Its approach since local management of schools was first introduced, has been to delegate that budget and allow individual schools to choose whether to buy back that service. The outcomes from these two approaches may be similar, but Lincolnshire's approach gives individual schools more freedom and places less responsibility on the Schools Forum's maintained school representatives to make a decision on their behalf. The table shows that Lincolnshire's total sum for de-delegation is equal to the Upper Tier average.

Table 3

Col	Budget line	Lincolnshire's funding per capita £	Upper Tier average funding per capita £	Lincolnshire's rank for Upper Tier authorities	England average (median) per capita £
21	High Needs budget	268	264	13 th highest	277

Comment: This budget line represents the top-up funding for special educational needs (SEN) that is given to special and maintained schools, the Teaching and Learning Centre and independent providers. It also includes various SEN support services. Lincolnshire's figure is very close both to the Upper Tier average and the England average.

Table 4

Col	Budget line	Lincolnshire's funding per capita £	Upper Tier average funding per capita £	Lincolnshire's rank for Upper Tier authorities	England average (median) per capita £
36	Total Schools Budget	4,504	4,622	21 st highest	4,933

Comment: This budget line represents the total for those lines preceding it. Essentially, it represents the DSG funding that each LA receives from the DfE. The earlier lines simply demonstrate how each LA uses it. The Schools Forum is principally concerned with the DSG, i.e. this line and those preceding it. Lincolnshire's relative position is not surprising because the DfE's funding of LAs has changed very little over the last decade.

Table 5

Col	Budget line	Lincolnshire's funding per capita £	Upper Tier average funding per capita £	Lincolnshire's rank for Upper Tier authorities	England average (median) per capita £
48 & 49	School transport	247	169	2 nd highest	86

Comment: These budget lines show the cost of home to school transport. Like the DSG, Lincolnshire also receives a relatively low level of government funding for services outside of the DSG. As reports to the Schools Forum in previous years have highlighted, the county continues to fund a much greater transport cost per pupil compared to many Upper Tier authorities. The differential with the England average is even greater. This means that the county has less funding available to provide other support services to children and schools.

Table 6

Col	Budget line	Lincolnshire's funding per capita £	Upper Tier average funding per capita £	Lincolnshire's rank for Upper Tier authorities	England average (median) per capita £
74	Looked After Children	133	206	27 th highest	274

Comment: This line sums a range of services relating to children's social care, including fostering, adoption and residential care. The table indicates that Lincolnshire's spending on these pupils is the lowest of all the Upper Tier authorities. Nevertheless, some of these services in Lincolnshire are judged to be outstanding, and so this indicates very effective use of this resource. There is however a need to improve further the educational outcomes for Looked After Children, hence the LA's proposal for 2014/15 to delegate to schools £1,200 for each looked after child.

Table 7

Col	Budget line	Lincolnshire's funding per capita £	Upper Tier average funding per capita £	Lincolnshire's rank for Upper Tier authorities	England average (median) per capita £
79	Total Safeguarding	136	136	14 th highest	172

Comment: This line sums a range of services relating to safeguarding. The table indicates that Lincolnshire's spending equates to the Upper Tier average.

Further comparisons can be made by referring to Appendix 1.

The s.251 benchmarking data will continue to be used by the LA each year to inform its future spending plans.

In conclusion, Lincolnshire's overall position on funding has not changed significantly in recent years. This is not surprising given that the funding (through the 'per pupil' Dedicated Schools Grant) will remain 'cash flat' for the four year Comprehensive Spending Review (CSR) period that started in 2011/12. There is therefore little room for growth or re-alignment of budgets. With regard to non-DSG budgets, LAs will have responded differently to the c.25% reduction to formula grant in this four year CSR period and we may be beginning to see this reflected through LAs' s.251 budget statements and this benchmarking data. Lincolnshire's per pupil DSG funding remains in the bottom quartile of all LAs and, as indicated in the table above, the 'per pupil' spending on the Schools Budget is £429 less than the England average (median). This adverse situation continues to be compounded by the fact that Lincolnshire also spends c.£161 per pupil more on school transport than the England average (median). Hopefully, the government's plan to review the funding of LAs for schools in the next spending review period will reduce these differentials in the medium term.

RECOMMENDATIONS

The Schools Forum is asked to note the content of the report.

APPENDICES - these are listed below and attached at the back of the report.

Appendix 1 - 2013/14 Section 251 benchmarking data for Upper Tier Authorities (LA Table - net)

Local Authority Benchmarking Tables 2013-14

This workbook contains Section 251 Budget LA Table (NET) information on

Information can be viewed for each Government Office Region (eg London, of LA (London, Unitary, Upper Tier or Metropolitan) or for all LAs. Alternatively choose your statistical neighbours or up to 10 LAs by selecting the "STATIS' NEIGHBOURS" option.

Please refer to the explanatory notes on the LA benchmarking website for in data sources and underlying calculations.

www.education.gov.uk/section251

Please select data to view:

CHOICE	▼
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Printing

Please note these tables are very large. Tables showing all LAs in a single C Region or LA type print to 7 pages. The table showing all LAs prints to 14 pages. Please wish to view 'Print Preview' before printing.

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Agenda Item 7



REGULATORY AND OTHER COMMITTEE REPORT

NAME OF COMMITTEE:	Schools Forum
DATE OF MEETING:	9 October 2013
SUBJECT:	Maintained School Carry Forwards (2012/13)
REPORT BY:	Tony Warnock (Head of Finance – Children’s and Specialist Services)
NAME OF CONTACT OFFICER:	Tony Warnock
CONTACT OFFICER TEL NO:	01522 553250
CONTACT OFFICER EMAIL ADDRESS:	tony.warnock@lincolnshire.gov.uk
IS THE REPORT CONFIDENTIAL?	No

SUMMARY

The purpose of this report is to provide information regarding Lincolnshire maintained schools' carry forwards at 31 March 2013. The underspendings carried forward by maintained schools have risen significantly in the past year and the likely reasons for that are explained within the report.

DISCUSSION

Introduction

Maintained schools are permitted to carry forward underspendings from one year to the next, subject to the provisions of Lincolnshire’s school carry forward policy, which forms part of Lincolnshire’s Scheme for Financing Schools.

School carry forwards 2012/13

The overall level of school carry forwards in maintained nursery, primary, secondary and special schools has risen by £5.318m (37.1%), from £14.342m in 2011/12 to £19.660m at the end of 2012/13 (please note that to ensure consistency, the 2011/12 comparator figures exclude the carry forwards of schools that closed during 2012/13 and those that have subsequently become academies).

- Nursery schools' carry forwards have reduced by £0.172 (-31.6%) to £0.372m.
- Primary schools' carry forwards have risen by £2.816m (23.5%) to £14.797m.
- Secondary schools' carry forwards have risen by £2.366m to £1.922m.
- Special schools' carry forwards have risen by £0.308m (13.6%) to £2.569m.

The sum carried forward each year is largely a matter for individual school governing bodies. However, there are likely to have been a number of factors that have influenced the increase in the overall level of underspendings in recent years. These include:

- Schools have been taking a prudent approach to budgeting in light of the recent, difficult economic climate.
- Although the government's four year Comprehensive Spending Review (CSR) allowed for growth in school funding for the £2.5bn pupil premium, no provision was made for pay awards or inflation on non-pay budgets.
- Since 2011/12, the government allocations for Devolved Formula Capital have fallen substantially and this funding has and continues to be used by many schools to finance essential capital items (e.g. information technology equipment).
- The Government's school funding reforms for 2013/14 created added uncertainty and a cautious approach has been adopted by many schools in response. Under current arrangements, nursery and special school budgets are highly susceptible to fluctuations in pupil numbers throughout the year, and this makes their financial planning considerably more difficult than for primary and secondary schools whose budgets are relatively certain from the beginning of the financial year.
- Further changes to the funding formula are proposed for 2014/15 and many schools are aware of this.
- The funding arrangements for sixth forms have changed recently and some secondary schools are suffering a significant reduction in funding.
- Although the current government is planning to protect school funding after the current CSR period ends, the potential change in government and the economic pressures faced by the country may lead schools to act more cautiously, even though the minimum funding guarantee (MFG) looks likely to continue.
- The MFG has been set at minus 1.5% per pupil in the recent years, and so all schools are nevertheless aware that they could lose some funding.
- The numbers on roll are falling in the secondary sector and are not due to pick up for several years.
- Some schools are continuing to build reserves to contribute towards major capital developments.

These and other issues have combined to create uncertainty in schools. They are unlikely to change in the foreseeable future and the prospect is that school governing bodies will decide to continue to retain a healthy level of reserves over the next few years.

Carry Forwards as a % of Budget Share

On average:

- Nursery schools carried forward: 14.94% (2011/12 24.54%).
- Primary schools carried forward: 9.11% (2011/12 8.22%).
- Secondary schools carried forward: 4.80% (2011/12 2.18%).

- Special schools carried forward: 8.57% (2011/12 8.32%).

The LA's carry forward policy

The LA's school carry forward policy was introduced on the 1st April 2004. It allows maintained nursery, primary and special schools to carry forward for any purpose, up to 8% of their budget share, or £30k (whichever is greater). Maintained secondary schools can carry forward 5% of their budget share. The policy states that additional sums can only be carried forward if they are for specific, costed, time limited, capital projects that are consistent with the priorities set out in the school's Asset Management Plan.

It is clear from this report that some schools have exceeded their carry forward limit. The LA asked schools to confirm their compliance with the policy and demonstrate how they planned to use their excess balances. The LA has assessed the responses to ensure compliance. The schools' plans will be monitored over the next year. The LA will continue to keep the school carry forward policy under review.

School Deficits

The total number of schools in deficit at the end of 2012/13 has decreased by 15, from 19 to 4. The number of schools with overspends comprises:

- 1 (0.4%) primary school (2011/12 – 12 schools)
- 2 (18%) secondary schools (2011/12 – 7 schools)
- 1 (5%) special school (2011/12 – 0 schools)

It is notable that:

- The total value of deficits at the end of 2012/13 has decreased by £1.185m to £0.181m.
- The deficits in each sector at 31 March 2013 were:
 - primary sector: £0.011m.
 - secondary sector: £0.120m.
 - special sector: £0.051m.
- Apart from 2009/10, the number of schools with deficits has fallen every year since a peak of 65 at 31 March 2003 (as stated above, there were 4 schools with deficits at 31 March 2013). Although the conversion of many secondary schools to academies in the last two years will have assisted with that improvement, this is a notable achievement over a long period of time.

Benchmarking

Benchmarking reports have historically shown Lincolnshire's school reserve levels, and the numbers of schools with overspends, to be broadly in line with East Midland and national averages. The LA will consider bringing a report on that to the Schools Forum once the DfE makes available the national data.

The LA's perspective

As a point of principle, the LA believes that schools should spend their annual budgets on the pupils that are in the school in that year. However, it is important that schools retain a reasonable level of reserves to help smooth out modest fluctuations in income and expenditure from year to year, and thereby help ensure better use of resources by avoiding redundancies wherever possible. The financial climate has been difficult in recent times. There has been a significant degree of change in local and national funding arrangements and that may continue. This has created uncertainty and schools have responded by increasing their levels of reserves. The LA expects school governing bodies and leadership teams to act prudently and achieve and maintain strong financial management standards. However, it does not expect them to carry forward an excessive level of reserves. The Finance team will therefore continue to monitor the financial position of

all maintained schools and, where necessary, information will be shared through the Schools Causing Concern mechanism.

Advice and guidance

The Finance team will continue to provide advice and guidance to maintained schools. It will continue to monitor their financial position and meet on a regular basis with representatives from those schools that have significant overspendings. The team's principal aims are to help improve financial management in schools and reduce the number of schools with overspends.

RECOMMENDATIONS

The Schools Forum is asked to note and comment upon the content of the report.

APPENDICES (If applicable) - these are listed below and attached at the back of the report.

APPENDIX 1	List of maintained school carry forwards at 31 st March 2013.
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BACKGROUND PAPERS

The following background papers as defined in the Local Government Act 1972 were relied upon in the writing of this report.

PAPER TYPE	TITLE	DATE	ACCESS- IBILITY
None			

FINAL SCHOOL CARRY FORWARDS 2012/13

1	2	3	4	5	6	7	8	9	10	11
SAP CODE	SCHOOL NAME	N.O.R. OCT 2012 PLASC	2012-2013		CARRY FORWARD			% v BUDGET	2011/12 £	CHANGE £
			SPEND £	BUDGET £	2012/13 C/F £	CAPITAL PROJECTS	CAPITAL NOTES			
	PRIMARY SCHOOLS									
715100	Alford Primary School	325	1,255,804.37	1,349,990.00	94,186		6.98%	90,135	4,051	
715300	Allington With Sedgbrook CE Primary	107	455,061.44	505,950.00	50,889		10.06%	13,590	37,299	
715500	Ancaster CE Primary School	117	473,130.71	502,210.00	29,079		5.79%	10,421	18,658	
716300	Bardney CE and Methodist Primary	114	460,702.16	518,240.00	57,538		11.10%	26,012	31,526	
716400	Barkston and Syston CE Primary School	104	454,373.94	491,590.00	37,216		7.57%	19,461	17,755	
716500	Barrowby CE Primary School	240	751,569.31	828,120.00	76,551		9.24%	54,997	21,554	
716600	Bassingham Primary School	196	683,936.50	713,270.00	29,334		4.11%	10,793	18,541	
716700	Baston CE Primary School	175	633,738.25	684,920.00	51,182		7.47%	96,210	(45,028)	
717000	Billingborough Primary School	107	491,982.53	544,330.00	52,347		9.62%	28,371	23,976	
717200	Billinghay CE Primary School	129	659,708.25	699,060.00	39,352		5.63%	44,398	(5,046)	
717400	Binbrook CE Primary School	84	495,028.44	508,360.00	13,332		2.62%	52,940	(39,609)	
717700	Blyton Cum Laughton CE Primary School	139	639,795.79	686,700.00	46,904		6.83%	22,379	24,525	
718300	Boston Hawthorn Tree School	299	1,066,640.40	1,140,570.00	73,930		6.48%	56,858	17,072	
718900	Boston St Mary's R.C. Primary School	211	760,097.68	822,960.00	62,862		7.64%	70,736	(7,874)	
719000	Boston St Nicholas CE Primary School	240	1,193,080.59	1,453,630.00	260,549		17.92%	303,832	(43,282)	
719100	Boston St Thomas CE Primary School	411	1,434,243.74	1,695,130.00	260,886		15.39%	125,535	135,352	
720200	Branston CE Infant School	96	395,807.48	431,310.00	35,503		8.23%	(7,213)	42,715	
720500	Brant Broughton CE and Methodist	77	331,251.69	374,400.00	43,148		11.52%	11,155	31,994	
720600	Brocklesby Park Primary School	34	233,487.30	295,490.00	62,003		20.98%	15,469	46,534	
720700	Bucknall Rural Villages School	33	289,862.73	345,320.00	55,457		16.06%	55,319	138	
720800	Burgh-le-Marsh St Peter & St Paul CE	226	781,567.64	889,980.00	108,412		12.18%	64,857	43,556	
720900	Bythams Primary School	90	390,352.88	426,200.00	35,847		8.41%	38,714	(2,867)	
721000	Butterwick Pinchbeck's Endowed CE	297	967,677.30	999,870.00	32,193		3.22%	27,217	4,975	
721100	Caistor CE and Methodist Primary School	258	892,502.81	926,500.00	33,997		3.67%	34,643	(646)	
721400	Cherry Willingham Primary School	291	968,275.11	1,061,110.00	92,835		8.75%	127,920	(35,085)	
721700	Caythorpe Primary School	140	607,431.28	677,490.00	70,059		10.34%	80,529	(10,470)	
721800	Chapel St Leonards Primary School	194	765,009.31	770,510.00	5,501		0.71%	48,153	(42,653)	
722100	Claypole CE Primary School	175	635,458.53	671,950.00	36,491		5.43%	31,833	4,658	
722200	Coleby CE Primary School	72	360,184.04	412,640.00	52,456		12.71%	38,913	13,543	
722300	Colsterworth CE Primary School	119	472,679.41	489,510.00	16,831		3.44%	27,911	(11,080)	
722500	Coningsby St Michael's CE Primary School	269	1,060,626.46	1,150,900.00	90,274		7.84%	78,963	11,310	
722600	Corby Glen Community Primary School	108	479,566.68	513,980.00	34,413		6.70%	68,308	(33,894)	
722700	Corringham CE (Voluntary Controlled)	91	431,802.21	506,810.00	75,008		14.80%	41,337	33,671	
722800	Cowbit St Mary's (Endowed) CE Primary	66	426,121.79	457,240.00	31,118		6.81%	41,237	(10,119)	
722900	Cranwell Primary School	302	1,014,450.00	1,156,160.00	141,710		12.26%	90,661	51,049	
723100	Crowland South View Community Primary	344	1,118,205.65	1,213,210.00	95,004		7.83%	94,881	124	
723200	Deeping St James Community Primary	204	704,527.71	738,130.00	33,602		4.55%	(6,953)	40,555	
723300	Deeping St Nicholas Primary School	50	278,499.58	351,160.00	72,660		20.69%	37,879	34,782	
723400	Deeping St James Linchfield Community	383	1,239,485.00	1,385,780.00	146,295		10.56%	83,721	62,574	
723500	Denton CE School	66	329,437.65	363,000.00	33,562		9.25%	45,990	(12,427)	
723600	Digby CE School	82	352,117.01	426,320.00	74,203		17.41%	35,342	38,861	
723700	Digby The Tedder Primary School	100	435,315.46	472,510.00	37,195		7.87%	24,513	12,681	
723900	Donington Cowley Endowed Primary	247	826,668.21	881,650.00	54,982		6.24%	42,095	12,887	
724000	Donington-on-Bain School	98	460,956.50	490,910.00	29,954		6.10%	13,499	16,455	
724200	Dunholme St Chad's CE Primary School	158	647,557.38	724,530.00	76,973		10.62%	85,360	(8,387)	
724300	Dunston St Peter's CE Primary School	80	414,105.01	462,780.00	48,675		10.52%	53,925	(5,250)	
724400	Eagle Community Primary School	85	360,330.32	447,230.00	86,900		19.43%	59,955	26,944	
724900	Edenham CE School	112	479,481.61	514,510.00	35,028		6.81%	41,304	(6,276)	
725200	Faldingworth Community Primary School	48	327,045.23	382,000.00	54,955		14.39%	43,411	11,544	
725400	Fiskerton CE Primary School	79	375,676.26	441,610.00	65,934		14.93%	28,336	37,597	
725500	Fleet Wood Lane School	137	534,422.61	563,150.00	28,727		5.10%	(19,386)	48,114	
725900	Friskney All Saints CE (Aided) Primary	151	659,716.46	717,710.00	57,994		8.08%	52,405	5,588	
726000	Frithville Primary School	51	299,598.68	355,260.00	55,661		15.67%	61,664	(6,003)	
726300	Fulstow Primary School	44	267,762.03	319,830.00	52,068		16.28%	41,746	10,322	
726600	Gainsborough Charles Baines Community	195	923,760.04	1,025,090.00	101,330		9.88%	111,789	(10,459)	
727400	Gainsborough St George's CE Community	174	959,959.87	1,060,500.00	100,540		9.48%	169,155	(68,615)	
727600	Gedney Church End Primary School	53	322,871.08	345,230.00	22,359		6.48%	43,204	(20,845)	
727700	Gedney Drove End School	40	242,992.85	275,190.00	32,197		11.70%	23,948	8,249	
727900	Gedney Hill CE (Controlled) Primary	42	219,468.64	231,530.00	12,061		5.21%	(39,935)	51,996	
728200	Gosberton Clough and Risegate	69	320,156.46	367,320.00	47,164		12.84%	29,636	17,527	
728400	Grainthorpe School	54	279,076.98	308,220.00	29,143		9.46%	4,749	24,394	
728500	Grantham Belton Lane Community	172	980,869.32	1,057,930.00	77,061		7.28%	206,535	(129,475)	

No Schools

FINAL SCHOOL CARRY FORWARDS 2012/13

1 SAP CODE	2 SCHOOL NAME	3 N.O.R. OCT 2012 PLASC	4		5	6	7	8			9	10	11
			2012-2013		2012/13 C/F £	CAPITAL PROJECTS	CARRY FORWARD		% v BUDGET	2011/12 £	CHANGE £		
			SPEND £	BUDGET £			CAPITAL NOTES						
728700	Grantham Gonerby Hill Foot CE Primary	315	971,887.33	1,092,540.00	120,653				11.04%	85,833	34,820		
728900	Grantham Huntingtower Community	347	1,186,497.49	1,333,160.00	146,663				11.00%	61,962	84,701		
729200	Grantham St Anne's CE Primary School	199	781,411.32	830,060.00	48,649				5.86%	46,679	1,969		
729300	Grantham St Mary's Catholic Primary	210	695,573.79	751,770.00	56,196				7.48%	19,544	36,652		
729500	Grantham Belmont Community School	191	830,062.41	872,430.00	42,368				4.86%	54,156	(11,788)		
729600	Grantham The Isaac Newton Primary	312	1,433,533.80	1,529,850.00	96,316				6.30%	86,824	9,492		
729700	Grantham Clifedale Primary School	320	968,137.61	1,047,300.00	79,162				7.56%	32,685	46,477		
729800	Grasby All Saints CE Primary School	92	416,264.77	501,540.00	85,275				17.00%	54,828	30,447		
730100	Great Gonerby St Sebastian's CE Primary	110	430,246.27	483,340.00	53,094				10.98%	(4,799)	57,892		
730300	Great Ponton CE School	55	276,482.08	318,820.00	42,338				13.28%	18,313	24,025		
730400	Great Steeping Primary School	99	456,074.89	507,670.00	51,595				10.16%	30,013	21,582		
730500	Grimoldby Primary School	198	739,563.00	843,680.00	104,117				12.34%	50,513	53,604		
730900	Hackthorn CE Primary School	58	288,383.87	361,150.00	72,766				20.15%	27,311	45,455		
731100	Halton Hologate CE Primary School	76	345,678.76	394,240.00	48,561				12.32%	24,368	24,194		
731200	Harlaxton CE Primary School	180	629,769.58	683,800.00	54,030				7.90%	53,396	635		
731500	Heckington St Andrew's CE Primary	200	674,645.10	704,440.00	29,795				4.23%	12,457	17,338		
731900	Helpingham School	111	495,104.38	526,650.00	31,546				5.99%	7,371	24,174		
732000	Hemswell Cliff Primary School	83	494,168.47	564,460.00	70,292				12.45%	55,131	15,161		
732200	Holbeach Bank Primary School	54	346,828.53	403,440.00	56,611				14.03%	27,375	29,237		
732400	Holbeach Primary School	238	984,269.17	1,112,880.00	128,611				11.56%	101,588	27,023		
732500	Holbeach St Mark's CE Primary School	28	224,550.69	273,290.00	48,739				17.83%	34,635	14,104		
732600	Holbeach William Stukeley CE Primary	251	975,421.60	1,075,330.00	99,908				9.29%	105,247	(5,338)		
732700	Holton-le-Clay Junior School	149	556,062.37	599,930.00	43,868				7.31%	22,375	21,493		
732800	Holton-le-Clay Infants' School	91	416,732.76	465,760.00	49,027				10.53%	28,038	20,989		
733000	Horbling Brown's CE Primary School	70	385,841.17	413,230.00	27,389				6.63%	48,872	(21,484)		
733300	Horncastle Community Primary School	517	1,897,316.72	2,008,540.00	111,223				5.54%	79,817	31,406		
733600	Ingham Primary School	109	463,755.11	508,430.00	44,675				8.79%	46,240	(1,565)		
733900	Ingoldsby Primary School	76	370,134.35	387,170.00	17,036				4.40%	19,399	(2,364)		
734000	Keelby Primary School	179	663,232.71	711,840.00	48,607				6.83%	43,949	4,658		
734100	Kirkby-la-Thorpe CE Primary School	123	501,707.29	549,930.00	48,223				8.77%	41,502	6,721		
734200	Kirkby-on-Bain CE Primary School	94	482,549.83	509,500.00	26,950				5.29%	34,753	(7,802)		
734300	Kirton Primary School	416	1,765,541.14	2,030,910.00	265,369				13.07%	262,589	2,780		
734400	Langtoft Primary School	199	703,703.68	761,870.00	58,166				7.63%	63,093	(4,926)		
734700	Leadenham CE Primary School	32	286,287.00	327,140.00	40,853				12.49%	47,879	(7,026)		
734800	Lea Frances Olive Anderson CE Primary	169	575,517.16	664,880.00	89,363				13.44%	22,676	66,687		
734900	Leasingham St Andrew's CE Primary	179	657,054.94	681,290.00	24,235				3.56%	36,593	(12,358)		
735000	Legbourne East Wold CE Primary School	114	443,474.69	487,260.00	43,785				8.99%	30,280	13,506		
735200	Legsby Primary School	48	298,532.49	345,090.00	46,558				13.49%	19,070	27,487		
735400	Lincoln The Lancaster School	109	623,463.20	639,590.00	16,127				2.52%	57,792	(41,665)		
735500	Lincoln Woodlands Infant & Nursery	145	811,575.11	889,370.00	77,795				8.75%	93,315	(15,520)		
735700	Lincoln Birchwood Junior School	234	1,267,569.08	1,321,240.00	53,671				4.06%	144,440	(90,769)		
735800	Lincoln The Sir Francis Hill Community	376	1,466,342.10	1,585,100.00	118,758				7.49%	105,396	13,362		
736000	Lincoln St Peter In Eastgate CE	89	429,644.95	509,370.00	79,725				15.65%	125,916	(46,191)		
736500	Lincoln Manor Leas Junior School	305	1,199,944.60	1,241,940.00	41,995				3.38%	17,612	24,383		
736600	Lincoln Leslie Manser Primary School	267	1,067,002.36	1,101,260.00	34,258				3.11%	66,892	(32,634)		
736700	Lincoln Monks Abbey Primary School	373	1,793,605.21	2,003,190.00	209,585				10.46%	186,491	23,094		
737000	Lincoln Our Lady of Lincoln Catholic	194	814,381.89	867,380.00	52,998				6.11%	60,013	(7,014)		
737400	Lincoln St Faith's CE Infant School	171	762,304.78	873,370.00	111,065				12.72%	71,849	39,216		
737500	Lincoln St Faith and St Martin CE Junior	196	730,742.27	751,560.00	20,818				2.77%	(6,732)	27,550		
737800	Lincoln St Hugh's Catholic Primary School	277	875,139.42	906,330.00	31,191				3.44%	12,471	18,720		
738000	Lincoln St Peter at Gowts CE Primary	210	919,057.96	965,490.00	46,432				4.81%	69,199	(22,767)		
738100	Lincoln Bishop King CE Community	288	1,225,192.36	1,560,820.00	335,628				21.50%	168,952	166,675		
738600	Lincoln The Meadows Primary School	275	1,049,172.96	1,114,740.00	65,567				5.88%	120,276	(54,709)		
738800	Lincoln The Chad Vairrah Primary School	470	1,982,574.55	2,134,180.00	151,605				7.10%	177,460	(25,854)		
739000	Long Sutton Primary School	337	1,198,823.13	1,239,640.00	40,817				3.29%	18,447	22,370		
739100	Louth Eastfield Infants' and Nursery School	227	1,138,416.68	1,324,180.00	185,763				14.03%	166,792	18,971		
739300	Louth Lacey Gardens Junior School	234	923,432.07	975,000.00	51,568				5.29%	(32,033)	83,601		
739400	Louth St Michael's CE School	225	879,552.17	953,690.00	74,138				7.77%	72,202	1,936		
739800	Lutton St Nicholas Primary School	73	348,267.10	404,730.00	56,463				13.95%	45,264	11,199		
740100	Mareham-le-Fen CE Primary School	75	377,555.73	426,460.00	48,904				11.47%	62,312	(13,408)		
740200	Market Deeping Community Primary	205	768,648.46	801,820.00	33,172				4.14%	23,591	9,580		
740300	Market Deeping William Hildyard CE	196	738,372.26	779,620.00	41,248				5.29%	29,873	11,375		
740400	Market Rasen CE Primary School	277	947,368.77	1,036,360.00	88,991				8.59%	47,712	41,280		

No Schools

FINAL SCHOOL CARRY FORWARDS 2012/13

1 SAP CODE	2 SCHOOL NAME	3 N.O.R. OCT 2012 PLASC	4		6 2012/13 C/F £	7 CAPITAL PROJECTS	8 CARRY FORWARD			9 % v BUDGET	10 2011/12 £	11 CHANGE £
			SPEND £	BUDGET £			CAPITAL NOTES					
740500	Marshchapel Primary School	53	406,043.16	452,990.00	46,947				10.36%	61,377	(14,430)	
740600	Marston Thorold's Charity CE Primary	81	354,216.56	391,910.00	37,693				9.62%	15,097	22,596	
740700	Martin Mrs Mary King's CE (Controlled)	90	360,011.78	404,050.00	44,038				10.90%	25,880	18,158	
740800	Marton Primary School	83	385,872.53	410,120.00	24,247				5.91%	11,473	12,774	
740900	Metheringham Primary School	238	904,658.64	959,820.00	55,161				5.75%	42,760	12,401	
741100	Middle Rasen Primary School	93	388,440.95	433,940.00	45,499				10.49%	13,331	32,168	
741200	Morton Trentside Primary School	207	723,985.39	767,780.00	43,795				5.70%	38,303	5,491	
741300	Morton CE (Controlled) Primary School	137	517,886.09	573,650.00	55,764				9.72%	13,986	41,778	
741400	Moulton Chapel Primary School	67	353,660.58	441,770.00	88,109				19.94%	57,251	30,859	
741500	Moulton The John Harrox Primary School	266	863,641.05	985,780.00	122,139				12.39%	87,082	35,057	
741800	Navenby CE Primary School	207	697,394.15	760,490.00	63,096				8.30%	51,385	11,711	
742000	Nettleham CE Voluntary Aided Junior	233	818,937.38	861,270.00	42,333				4.92%	7,224	35,109	
742200	Nettleton Community School	46	346,623.17	408,980.00	62,357				15.25%	69,905	(7,548)	
742300	New Leake Primary School	52	324,489.92	397,550.00	73,060				18.38%	40,540	32,520	
742400	New York Primary School	55	347,490.71	412,280.00	64,789				15.71%	52,989	11,801	
742500	Newton-on-Trent CE Primary School	32	241,670.80	282,600.00	40,929				14.48%	37,235	3,694	
742600	Nocton Community School	49	270,354.27	304,370.00	34,016				11.18%	20,054	13,961	
742700	Normanby-by-Spital Primary School	65	335,469.35	394,110.00	58,641				14.88%	37,417	21,224	
742800	North Cockerington CE Primary School	82	357,876.04	391,930.00	34,054				8.69%	18,911	15,143	
742900	North Coles CE Primary School	77	390,778.33	428,220.00	37,442				8.74%	44,611	(7,169)	
743000	North Hykeham All Saints CE Primary	155	641,996.10	684,550.00	42,554				6.22%	39,270	3,284	
743600	Kelsey Primary School	56	331,311.34	383,600.00	52,289				13.63%	67,968	(15,679)	
743900	North Scarle Primary School	47	263,392.90	306,140.00	42,747				13.96%	50	42,697	
744000	North Somercotes CE Primary School	135	545,300.00	585,660.00	40,360				6.89%	29,528	10,832	
744100	North Thoresby Primary School	68	361,991.76	411,390.00	49,398				12.01%	47,253	2,146	
744400	Old Leake Primary and Nursery School	168	804,406.17	919,340.00	114,934				12.50%	134,486	(19,552)	
744600	Osbourne Primary School	95	370,136.58	388,920.00	18,783				4.83%		32,865	
744700	Osgodby Primary School	88	364,248.15	419,550.00	55,302				13.18%	14,809	40,493	
745000	Partney CE Primary School	62	293,279.48	336,880.00	43,601				12.94%	13,409	30,192	
745100	Pinchbeck East CE Primary School	292	1,041,191.35	1,125,740.00	84,549				7.51%	58,639	25,910	
745200	Pinchbeck St Bartholomew's CE Primary	97	456,066.45	524,720.00	68,654				13.08%	43,323	25,331	
745400	Pointon St Gilbert of Sempringham CE	70	364,734.47	398,150.00	33,416				8.39%	12,706	20,710	
745500	Potterhanworth CE Primary School	109	464,224.77	546,610.00	82,385				15.07%	22,405	60,340	
745600	Quadring Cowley and Brown's Primary	90	416,703.62	482,220.00	65,516				13.59%	103,985	(38,468)	
745800	Reepham CE Primary School	180	584,786.30	676,910.00	92,124				13.61%	51,355	40,769	
746100	Ropsley CE Primary School	93	395,071.44	436,310.00	41,239				9.45%	26,476	14,763	
746500	Ruskington Winchelsea Primary School	132	507,374.92	579,770.00	72,395				12.49%	12,546	59,849	
746600	Saltfleetby CE Primary School	37	348,077.48	427,880.00	79,803				18.65%	63,567	16,235	
746800	Saxilby CE Primary School	285	976,147.19	965,380.00	(10,767)				-1.12%	49,932	(60,699)	
747000	Scamblesby CE Primary School	69	349,115.26	407,610.00	58,495				14.35%	38,766	19,729	
747100	Scampton Pollyplatt Primary School	132	480,150.10	515,650.00	35,500				6.88%	13,925	21,575	
747200	Scampton CE Primary School	85	388,869.77	429,990.00	41,120				9.56%	15,216	25,904	
747500	Scotter Primary School	268	903,322.12	969,990.00	66,668				6.87%	56,323	10,345	
747800	Sibsey Free Primary School	178	630,663.85	733,870.00	103,206				14.06%	67,585	35,621	
748100	Skegness Seathorne Primary School	364	1,690,735.05	1,827,720.00	136,985				7.49%	163,595	(26,610)	
748200	Skegness The Richmond School	444	1,571,325.96	1,723,490.00	152,164				8.83%	116,252	35,912	
748400	Skellingthorpe The Holt Primary School	182	673,681.57	778,540.00	104,858				13.47%	75,135	29,724	
748500	Skellingthorpe St Lawrence CE Primary	135	545,073.26	559,840.00	14,767				2.64%	30,395	(15,628)	
748800	Sleaford Church Lane Primary School and	167	833,746.63	880,760.00	47,013				5.34%	(28,620)	75,634	
748900	Sleaford Our Lady of Good Counsel	153	597,348.02	634,350.00	37,002				5.83%	12,406	24,596	
749200	Sleaford St Botolph's CE School	392	1,286,483.33	1,385,190.00	98,707				7.13%	89,344	9,363	
749400	South Hykeham School	135	510,494.46	554,980.00	44,486				8.02%	35,733	8,752	
749900	South Witham Community Primary School	90	457,593.77	528,290.00	70,696				13.38%	70,729	(33)	
750100	Spalding Parish CE Day School	407	1,449,811.36	1,591,500.00	141,689				8.90%	99,779	41,909	
750200	Spalding St John The Baptist CE Primary	425	1,403,466.06	1,527,820.00	124,354				8.14%	83,780	40,574	
750300	Spalding St Norbert's Catholic Primary	187	666,129.93	750,500.00	84,370				11.24%	64,787	19,583	
750400	Spalding St Paul's Community Primary and	199	1,094,967.23	1,285,470.00	190,503				14.82%	177,709	12,793	
750500	Spalding Monkshouse Primary School	314	1,368,693.84	1,582,170.00	213,476				13.49%	177,984	35,492	
750700	Spalding Primary School	432	1,475,617.53	1,606,900.00	131,282				8.17%	129,660	1,622	
750900	Spilsby Primary School	189	825,745.68	872,520.00	46,774				5.36%	70,699	(23,925)	
751100	Stamford The Bluecoat School	165	950,196.31	1,043,500.00	93,304				8.94%	75,787	17,517	
751300	Stamford St Augustine's Catholic Primary	127	584,538.59	591,580.00	7,041				1.19%	24,112	(17,071)	
751400	Stamford St George's CE Primary School	168	661,774.34	736,700.00	74,926				10.17%	53,313	21,612	

No Schools

FINAL SCHOOL CARRY FORWARDS 2012/13

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			2012-2013				CAPITAL NOTES				
			SPEND £	BUDGET £			CAPITAL NOTES	CAPITAL NOTES			
751900	Stickney CE Primary School	176	723,791.59	772,840.00	49,048			6.35%	12,706	36,343	
752000	Sturton by Stow Primary School	120	540,767.73	584,030.00	43,262			7.41%	25,153	18,110	
752100	Surfleet Seas End Primary School	71	316,855.60	344,800.00	27,944			8.10%	29,024	(1,079)	
752300	Sutton Bridge Westmere Community	212	992,552.88	1,046,590.00	54,037			5.16%	158,275	(104,238)	
752500	Sutton St James Community School	88	475,750.00	591,540.00	115,790			19.57%	100,046	15,744	
752600	Sutterton Fourfields CE School	133	606,774.09	657,960.00	51,186			7.78%	83,347	(32,161)	
752700	Sutton-on-Sea Community Primary School	170	770,866.23	841,170.00	70,304			8.36%	47,752	22,552	
753200	Swinderby All Saints CE Primary School	92	391,836.15	451,590.00	59,754			13.23%	39,598	20,156	
753300	Swineshead St Mary's CE Primary School	227	853,094.20	919,070.00	65,976			7.18%	71,352	(5,376)	
753900	Tattershall Holy Trinity CE School	107	465,290.88	493,900.00	28,609			5.79%	24,858	3,751	
754000	Tattershall Primary School	122	588,251.50	625,650.00	37,399			5.98%	47,475	(10,077)	
754100	Tealby School	69	323,127.16	342,390.00	19,263			5.63%	16,156	3,107	
754200	Tetford The Edward Richardson Primary	115	465,987.46	504,810.00	38,823			7.69%	25,036	13,786	
754300	Tetney Primary School	118	450,102.25	472,870.00	22,768			4.81%	21,902	865	
754400	Theddlethorpe Primary School	73	373,539.92	436,210.00	62,670			14.37%	47,249	15,421	
754500	Thorpe-on-the-Hill St Michael's CE	160	596,606.11	634,540.00	37,934			5.96%	19,907	18,027	
754700	Thurbly Community Primary School	193	640,556.19	641,300.00	744			0.12%	(403)	1,147	
754800	Toynton All Saints Primary School	51	318,404.27	333,280.00	14,876			4.46%	2,940	11,936	
755000	Tydd St Mary CE Primary School	101	424,075.36	502,020.00	77,945			15.53%	42,469	35,475	
755300	Uffington CE Primary School	94	367,614.96	403,250.00	35,635			8.84%	33,867	1,768	
755400	Utterby Primary School	57	315,974.56	367,530.00	51,555			14.03%	23,758	27,797	
755600	Waddingham Primary School	72	315,795.94	398,820.00	83,024			20.82%	50,298	32,726	
755700	Waddington Redwood Primary School	303	990,736.29	1,079,800.00	89,064			8.25%	53,012	36,052	
755800	Waddington All Saints Primary School	373	1,396,198.72	1,467,630.00	71,431			4.87%	90,231	(18,800)	
756000	Wainfleet Magdalen CE/Methodist School	195	884,789.28	887,590.00	2,801			0.32%	753	2,048	
756400	Walcott Primary School	81	392,960.05	449,440.00	56,480			12.57%	57,936	(1,456)	
756700	Welbourn CE Primary School	69	298,062.22	362,030.00	63,968			17.67%	25,935	38,033	
757300	Weston Hills CE Primary School	140	582,231.49	678,750.00	96,519			14.22%	93,660	2,859	
757400	Weston St Mary CE Primary School	60	357,944.37	400,290.00	42,346			10.58%	43,745	(1,399)	
757500	Whaplode CE Primary School	192	742,215.05	877,890.00	135,675			15.45%	104,891	30,784	
757700	Shepeau Stow Primary School	67	330,408.83	398,320.00	67,911			17.05%	41,198	26,713	
758100	Willoughby St Helena's CE Primary School	96	457,133.96	516,280.00	59,146			11.46%	33,882	25,264	
758200	Willoughton Primary School	45	256,009.71	298,370.00	42,360			14.20%	24,491	17,869	
758500	Withern St Margaret's CE School	34	274,231.21	331,540.00	57,309			17.29%	30,890	26,419	
758900	Wragby Primary School	159	726,362.67	803,280.00	76,917			9.58%	48,627	28,291	
759000	Wrangle Primary School	60	339,720.00	388,300.00	48,580			12.51%	33,060	15,520	
759100	Wyberton Primary School	203	711,606.85	814,250.00	102,643			12.61%	88,228	14,415	
TOTAL PRIMARY SCHOOLS		35,951	147,600,931	162,397,910	14,796,979	0		9.11%	11,981,185	2,815,794	
SECONDARY SCHOOLS											
761700	Cherry Willingham Community School	439	2,454,587.58	2,442,550.00	(12,038.)			-0.49%	(145,826)	133,788	
762700	Gainsborough Queen Elizabeth's High School	904	5,210,488.47	5,509,120.00	298,632			5.42%	174,927	123,705	
763800	Horncastle Banovallum School	632	2,814,504.83	2,872,950.00	58,445			2.03%	(401,344)	459,790	
764000	Kirton Middlecott School	510	2,909,786.79	2,801,910.00	(107,877.)			-3.85%	(138,870)	30,993	
764500	Lincoln St Peter and St Paul Catholic High School A Science	517	2,943,785.00	3,088,130.00	144,345			4.67%	(112,457)	256,802	
765400	Long Sutton The Peele School	669	3,589,333.00	3,791,260.00	201,927			5.33%	22,071	179,856	
765500	Louth King Edward VI Grammar School	616	3,447,287.00	3,758,730.00	311,443			8.29%	101,760	209,683	
765700	Louth Monks' Dyke Technology College	855	5,802,419.00	6,239,210.00	436,791			7.00%	(205,441)	642,232	
766400	North Somercotes Birkbeck School Community Arts College	305	2,060,983.59	2,114,130.00	53,146			2.51%	7,188	45,958	
767500	Spalding High School	730	4,241,296.83	4,553,310.00	312,013			6.85%	157,255	154,759	
768500	Tattershall Gartree Community School	392	2,637,580.18	2,862,690.00	225,110			7.86%	96,886	128,223	
TOTAL SECONDARY SCHOOLS		6,569	38,112,052	40,033,990	1,921,938	0		4.80%	(443,851)	2,365,788	
SPECIAL SCHOOLS											
770000	Boston John Fielding School	42.0	895,714.23	1,015,060.00	119,346			11.76%	86,147	33,199	
770200	Spilsby The Lady Jane Franklin School	55	1,493,103.70	1,647,200.00	154,096			9.36%	91,345	62,752	
770300	Lincoln The Fortuna Primary School	56	1,232,145.69	1,440,130.00	207,984			14.44%	137,571	70,413	
770600	Gosberton House School	85	1,347,355.79	1,431,060.00	83,704			5.85%	132,949	(49,245)	
770700	Grantham Ambergate School	123	1,459,453.51	1,601,180.00	141,726			8.85%	41,226	100,501	
770800	Grantham Sandon School	63	962,529.63	1,054,190.00	91,660			8.69%	53,405	38,255	
770900	Aegir Community School	109	1,513,021.27	1,670,600.00	157,579			9.43%	114,998	42,581	

No Schools

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FINAL SCHOOL CARRY FORWARDS 2012/13

1 SAP CODE	2 SCHOOL NAME	3 N.O.R. OCT 2012 PLASC	4		5	6	7	8		9	10	11
			2012-2013		2012/13 C/F £	CAPITAL PROJECTS	CARRY FORWARD	CAPITAL NOTES	% v BUDGET	2011/12 £	CHANGE £	
			SPEND £	BUDGET £								
771000	Horncastle St Lawrence School	136	1,836,543.75	1,997,490.00	160,946				8.06%	124,203	36,744	
771100	Warren Wood Community School	51	1,005,397.35	1,131,700.00	126,303				11.16%	146,030	(19,728)	
771200	Lincoln Queen's Park School	67	1,659,037.90	1,608,490.00	(50,548.)				-3.14%	35,940	(86,488)	
771300	Lincoln St Christopher's School	187	2,187,023.75	2,416,340.00	229,316				9.49%	258,592	(29,276)	
771400	Lincoln St Francis Special School	110.5	2,658,702.26	2,938,400.00	279,698				9.52%	255,747	23,950	
771500	Lincoln The Sincil School	59	1,667,528.95	1,999,260.00	331,731				16.59%	302,998	28,733	
771700	Louth St Bernard's School	45.5	1,343,326.61	1,471,370.00	128,043				8.70%	101,576	26,467	
771800	Boston Pilgrim School	4	1,023,110.42	1,133,170.00	110,060				9.71%	46,948	63,111	
771900	South Rauceby Ash Villa School	1	248,881.80	262,430.00	13,548				5.16%	12,584	964	
772100	Spalding The Garth School	39.5	879,155.77	931,290.00	52,134				5.60%	48,990	3,145	
772200	Spalding The Priory School	130	1,581,698.64	1,635,720.00	54,021				3.30%	57,924	(3,902)	
772300	Spilsby The Eresby School	46.5	914,473.11	1,002,030.00	87,557				8.74%	73,603	13,954	
772600	Bourne The Willoughby School	68.5	1,484,776.81	1,574,400.00	89,623				5.69%	137,617	(47,994)	
TOTAL SPECIAL SCHOOLS		1,479	27,392,981	29,961,510	2,568,529	0			8.57%	2,260,394	308,135	
NURSERY SCHOOLS												
711200	Grantham Wyndham Park Nursery	54	445,777.66	489,480.00	43,702				8.93%	43,423	279	
712200	Lincoln St Giles Nursery	48	567,218.04	747,500.00	180,282				24.12%	221,216	(40,935)	
712400	Lincoln Kingsdown Nursery	35.5	392,649.65	437,220.00	44,570				10.19%	86,089	(41,518)	
712500	Gainsborough Nursery	72	365,414.68	422,180.00	56,765				13.45%	104,950	(48,185)	
712600	Boston Nursery	33.5	347,629.54	394,400.00	46,770				11.86%	88,139	(41,368)	
TOTAL NURSERY SCHOOLS		243	2,118,690	2,490,780	372,090	0			14.94%	543,817	(171,727)	
NURSERY, PRIMARY, SECONDARY & SPECIAL		44,242	215,224,654	234,884,190	19,659,536	0			8.37%	14,341,546.2	5,317,990	

No Schools

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Agenda Item 8



REGULATORY AND OTHER COMMITTEE REPORT

NAME OF COMMITTEE:	Schools Forum
DATE OF MEETING:	9 October 2013
SUBJECT:	Academies update
REPORT BY:	Michelle Andrews (Head of Property and Technology Management)
NAME OF CONTACT OFFICER:	Adrian Clarke
CONTACT OFFICER TEL NO:	01522 553216
CONTACT OFFICER EMAIL ADDRESS:	adrian.clarke@lincolnshire.gov.uk
IS REPORT CONFIDENTIAL?	No

SUMMARY

The purpose of this report is to provide information on the latest number of pupils in academies.

DISCUSSION

The Schools Forum asked for an update to be provided to each meeting on the number of academy conversions.

This is the position as at the 1st September 2013. The pupil figures are based on the Summer term census data (i.e. the latest available).

Current Status of All Lincolnshire State Schools

	Schools		FTE	
Nursery				
All	5		575.0	
Maintained	5	100.0%	575.0	100.0%
Academy	0	0.0%	0.0	0.0%
Primary				
All	277		51245	
Maintained	217	78.3%	35162	68.6%
Academy	60	21.7%	16083	31.4%
Secondary				
All	54		47502	
Maintained	10	18.5%	6951	14.6%
Academy	44	81.5%	40551	85.4%
Special				
All	22		1714	
Maintained	19	86.4%	1604	93.6%
Academy	3	13.6%	110	6.4%
PRU				
All	1		300	
Maintained	1	100.0%	300	100.0%
Academy	0	0.0%	0	0.0%
Total				
All	359		101336	
Maintained	252	70.2%	44592	44.0%
Academy	107	29.8%	56744	56.0%

By 1st March 2014 if conversions, sponsorships and new school openings proceed according to their target dates the position will be:

Projected Six Month Status of All Lincolnshire State Schools

	Schools		FTE	
Nursery				
All	5		345	
Maintained	5	100.0%	345	100.0%
Academy	0	0.0%	0	0.0%
Primary				
All	278		51245	
Maintained	214	77.0%	34798	67.9%
Academy	64	23.0%	16447	32.1%
Secondary				
All	54		47502	
Maintained	10	18.5%	6951	14.6%
Academy	44	81.5%	40551	85.4%
Special				
All	22		1699	
Maintained	19	86.4%	1589	93.5%
Academy	3	13.6%	110	6.5%
PRU				
All	1		300	
Maintained	1	100.0%	300	100.0%
Academy	0	0.0%	0	0.0%
Total				
All	360		101090	
Maintained	249	69.2%	43983	43.5%
Academy	111	30.8%	57108	56.5%

RECOMMENDATIONS

The Schools Forum is asked to note the contents of the report.

APPENDICES - these are listed below and attached at the back of the report.

None

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REGULATORY AND OTHER COMMITTEE REPORT

NAME OF COMMITTEE:	Schools Forum
DATE OF MEETING:	9 October 2013
SUBJECT:	School and Early Years Finance regulations 2013 and additional grant conditions for the Dedicated Schools Grant – DfE consultation
REPORT BY:	Tony Warnock Head of Finance (Children's and Specialist Services)
NAME OF CONTACT OFFICER:	Tony Warnock
CONTACT OFFICER TEL NO:	01522 553250
CONTACT OFFICER EMAIL ADDRESS:	tony.warnock@lincolnshire.gov.uk
IS REPORT CONFIDENTIAL?	No

SUMMARY

The purpose of this report is to advise the Schools Forum that on 2nd August 2013, the DfE published a consultation on the School and Early Years Finance Regulations for 2013 and additional grant conditions for the Dedicated Schools Grant.

DISCUSSION

The main purpose of the proposed changes is to give effect to the changes to the funding system that the government intends to introduce in 2014/15. A copy of the consultation can be found at:

<https://www.gov.uk/government/publications/consultation-letter-on-school-and-early-years-finance-regulations-2013>

A summary of the proposed changes is attached at Appendix 1.

The consultation closes on 11th October 2013. The LA will seek to provide a response to the DfE regarding any key concerns.

The regulations are expected to come in to force on 1 January 2014 (i.e. the same implementation date that was used for this year's regulations).

LA officers will ensure compliance with the regulations as the new funding arrangements for 2014/15 are developed and become operational.

RECOMMENDATIONS

The Schools Forum is asked to note the content of the report.

APPENDICES (If applicable) - these are listed below and attached at the back of the report.

Appendix 1: Summary of the proposed changes to school and early years finance regulations and additional grant conditions for the Dedicated Schools Grant

BACKGROUND PAPERS			
PAPER TYPE	TITLE	DATE	ACCESSIBILITY
DfE consultation document	School and Early Years Finance regulations and additional grant conditions for the Dedicated Schools Grant	2 August 2013	https://www.gov.uk/government/publications/consultation-letter-on-school-and-early-years-finance-regulations-2013

Proposed changes to school and early years finance regulations

Changes that were not included in the 2014-15 announcement and operational information are in italics, with a brief explanation of the policy. For an explanation of the policy for the other changes, please refer to the documents published on 4 June.

Regulation 3 includes an amendment to the Order that transfers responsibility for school meals to schools to make it clear that this transfer applies to schools whether or not the local authority provides a specific amount of funding to the school for lunches. This is a clarification of existing policy. Schools already fund lunches from their mainstream budgets rather than a specific grant.

Regulation 4 includes an amendment to the Schools Forums (England) Regulations 2012 to require the election of a representative of providers of 16 to 19 education to the schools forum, and to remove the inclusion of a representative of the local authority's 14 to 19 partnership on the forum. We are proposing that eligible institutions should be those in the FE sector (FE and sixth form colleges) and other institutions that specialise in SEN and LDD provision (ISPs), where 20% or more of their students reside in the authority's area.

Regulation 6 and regulation 12 require local authorities to make an initial determination of their 2014-15 schools budget, individual schools budget and the amount of each school's budget share by 28th February 2014 (except in relation to special schools, pupil referral units, etc). In the previous regulations the date for doing so was 15th March. The date for informing schools of their budget shares also moves from 15th March to 28th February.

Another change is that the determination of amounts included in budget shares in relation to sixth form funding is excluded from these determinations. Sixth form funding calculations will have to be done within a reasonable period after the Secretary of State has informed the authority of the allocation of Sixth Form Grant.

Under regulation 12(7) the deadline for informing special schools and pupil referral units of their budgets moves from 15th March to 31st March.

Regulation 9(7) requires local authorities to put any unspent money from the 2013-14 growth and infant class size funds into the 2014-15 individual schools budget, so that it is recycled to schools.

Regulation 9(8) allows local authorities to carry over to 2014-15 unspent de-delegated central expenditure to be used for the same purpose as it was used in 2013-14. In other words, it can be used for de-delegated services without having to allocate through the formula again. This responds to representations that money that maintained schools de-delegate should continue to be available for the use of maintained schools.

Regulation 12(3) has been amended to require local authorities, in identifying funding for SEN pupils in individual primary and secondary school budgets (the notional SEN budget), to calculate that sum with reference to a threshold of £6,000. Schools are expected to meet the costs of the additional support required by pupils with SEN up to that cost threshold.

Regulation 12(8) prevents local authorities from redetermining a school's or early years provider's 2014-15 budget once it has been set, except in specific circumstances. This provision was introduced for 2013-14 but there has been some confusion about it so we are clarifying the position.

The definition of "pupils" for **regulation 14 and elsewhere (other than regulation 17 on early years)** has been amended to clarify that pupils only count if they are single registered or dual main registered at the school.

Regulation 14(2)(a) provides that SEN places, whether filled or unfilled, do not count towards a school's pupil numbers for the purpose of calculating its budget through the mainstream local funding formula. For 2013-14 the regulation provided that pupils in SEN places did not count. The change is to avoid double funding.

Regulation 14(5) provides that the basic per pupil amount (the age-weighted pupil unit) in a local authority's formula must be at least £2000 for primary and £3000 for secondary pupils.

Regulation 15 has been amended to ensure that, for maintained special schools, the separate calculation of funding for sixth form places ceases with effect from 1st August 2014, and all places (including sixth form places) other than hospital education places will then attract £10,000 per annum. We would welcome specific comments on the change to regulation 15 as we did not consult on this policy change earlier in the year. The intention is that special schools will receive the flat rate £10,000 for all their places, including sixth form places for students aged 16-19, other than hospital education places. In the academic year from August 2013 to July 2014 special schools are receiving their place-led funding for the 16-19 year olds through the sixth form grant calculation which allocates an amount derived from the national funding formula for this age group plus £6,000 for identified high needs places. This will normally provide an amount in excess of £11,000.

The change to a flat rate £10,000 for all pre- and post-16 places will take effect from 1st August 2014. The regulations will apply this to maintained special schools. The Education Funding Agency (EFA) will also apply this to the funding of special academies and free schools and of non-maintained special schools. We will keep under review whether to

2014-15 DSG: additional conditions of grant

- (a) the authority must maintain a single formula for funding both maintained schools and Academies in its area;
- (b) in constructing the formula, the authority must take account of the circumstances of all Academies and maintained schools in its area;
- (c) the formula must allocate at least 80% of funding through pupil-led factors (single per pupil amount, social deprivation, prior attainment, English as an additional language, pupil mobility, looked after children, differential salaries of teachers near London);
- (d) any limiting or scaling back of the funding of schools and Academies that gain from the formula must not exceed in total the cost of funding the minimum funding guarantee for schools and Academies entitled to the MFG;
- (e) in using funding held centrally within DSG, other than funding that has been de-delegated by maintained schools, the authority must treat maintained schools and Academies to which recoupment applies on an equivalent basis;
- (f) in making arrangements for funding young people with high needs, the authority must treat those placed in maintained provision, in Academies and Free Schools, in the FE sector, and in non-maintained and independent provision on a fair and equivalent basis;
- (g) in deciding on top-up funding rates for the pupils it will place in special schools maintained by the Authority and Special Academies formerly maintained by the authority, the authority must ensure that the rates for each school are set no lower than at such a rate or rates that, if all the pupils in the school or Academy were placed by the authority, and the total number and type of places remained the same in the two financial years, the school or Academy's budget would reduce by no more than 1.5% in cash between 2013-14 and 2014-15;
- (h) when a pupil who requires top-up funding has already been placed in an institution and is in receipt of top-up funding from the authority at 31 March 2014, the authority must continue the agreement with the institution to make such top-up payments until such time as the pupil has left the institution, or the contract is replaced by another. When such a pupil is placed by the authority in an institution at a later date, the authority must likewise enter into such an agreement;
- (i) when making top-up payments to institutions for high needs pupils, the authority must make the payments in a timely fashion on a basis agreed with the institution, which must be monthly unless otherwise agreed. 9

REGULATORY AND OTHER COMMITTEE REPORT

NAME OF COMMITTEE:	Schools Forum
DATE OF MEETING:	9 October 2013
SUBJECT:	Schools Financial Value Standard (SFVS)
REPORT BY:	Tony Warnock Head of Finance (Children's and Specialist Services)
NAME OF CONTACT OFFICER:	Tony Warnock
CONTACT OFFICER TEL NO:	01522 553250
CONTACT OFFICER EMAIL ADDRESS:	tony.warnock@lincolnshire.gov.uk
IS REPORT CONFIDENTIAL?	No

SUMMARY

The purpose of this report is to provide an update on the Schools Financial Value Standard (SFVS).

DISCUSSION

Introduction

As reported last year, the DfE launched the new SFVS after the Financial Management Standard in Schools (FMSiS) was withdrawn by the Secretary of State from 15th November 2010. The SFVS is intended to assist maintained schools in managing their finances and to give assurance that they have secure financial management in place. Governing bodies have formal responsibility for the financial management of their schools, and so the standard is primarily aimed at governors. Access to the DfE's information on the SFVS is available via this link:

Maintained schools are required to complete the SFVS once a year. Apart from those schools that did not attain the FMSiS, the first run through for most schools was required by March 2013. There are 23 questions that governors should formally discuss with school staff and a declaration signed by the Chair of Governors must be sent to the LA each year. The SFVS is not externally assessed. Academies and Free Schools are not required to complete the SFVS because it would duplicate their financial monitoring and assurance requirements. Nursery schools are required to complete it. LAs are expected to audit a school or issue a notice of concern when the SFVS is not completed. The ultimate sanction that remains is for the LA to withdraw delegation.

The 2012/13 position

A statement signed by the Council's Director of Resources was sent to the DfE on 23rd May 2013. It stated that:

- 11 maintained secondary schools
- 225 maintained primary schools
- 18 maintained special schools
- 5 maintained nursery schools

had completed the SFVS.

It also showed that only two schools had failed to comply. It explained that one of those was a special school that was due to close and the other was a special school that was subject to a significant change in management.

As stated in previous reports, the SFVS was heralded as a lighter touch approach than the FMSiS. Unlike FMSiS, the SFVS is not externally assessed. The DfE's guidance states that:

- there is no prescription of the level of evidence that the governing body should require;
- the important thing is that governors are confident about their responses;
- LA's should use schools' SFVS returns to inform their programme of financial assessment and audit; and
- when they conduct an audit, LAs can check whether the self-assessment is in line with their own judgement.

The LA can report that a number of recent audit inspections have assessed a few schools' financial management, procedures and systems of control to provide only 'limited assurance'. Despite that, those schools' SFVS returns indicate no weaknesses. The LA has therefore concluded that it cannot place a significant degree of reliance on the SFVS returns submitted by schools. Schools' SFVS returns provide the LA with very little information to make sound and reliable judgements on the effectiveness of school financial management. Realistically, officers can only check that a return is submitted on time and that entries on it appear reasonable. So whilst on the face of it the very high number of SFVS return submissions appears extremely positive, the level of re-assurance that can be taken from that is questionable.

Academies

The SFVS does not apply to academies, although they are free to use it. Academies are required to comply with the Academies Handbook.

RECOMMENDATIONS

The Schools Forum is asked to note the content of this report.

APPENDICES (If applicable) - these are listed below and attached at the back of the report.

None

BACKGROUND PAPERS			
PAPER TYPE	TITLE	DATE	ACCESSIBILITY
Report to Schools Forum	Schools Financial Value Standard (SFVS)	10 October 2012	County Offices, Newland, Lincoln, LN1 1YQ

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Agenda Item 11

Lincolnshire Schools' Forum

9 October 2013

Information Pack

1.	Draft Minutes from the Children and Young People's Strategic Partnership held on 7 August 2013	A
2.	Draft Minutes from the Strategy Review Board held on 11 September 2013	B
3.	Outreach Review (Report to follow)	~
4.	Energy Update	D
5.	List of Acronyms	E
6.	Schools' Forum Work Plan	F

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**CHILDREN AND YOUNG PEOPLE
STRATEGIC PARTNERSHIP
7 AUGUST 2013**

PRESENT:

Malcolm Barham, Debbie Barnes, Ginnie Blackoe, Stuart Carlton, Chris Cook, Richard Cumbers, Michael Follows, Linda Houtby (for John Allen), Kerry Mitchell, David McWilliams, Andy Payne, Joanna Riddell, Meredith Teasdale, Mandy Sowerby and Keith Smy.

Officer in attendance: Andrea Brown, Democratic Services Officer.

15 APOLOGIES FOR ABSENCE

Apologies for absence were received from Councillor D Brailsford, Councillor Mrs P A Bradwell, J Tubb, A Fisher, C Seymour, Dr V Bhandal, J Spencer, T Blackwell, P Roberts, J Allan, who was represented by L Houtby, and K Parsons, who was represented by M Sowerby.

16 MINUTES OF THE PREVIOUS MEETING AND ACTION POINTS OF THE STRATEGIC PARTNERSHIP

Points of Accuracy

Minute Number 3, paragraph 5 – it was felt that the paragraph was misleading and suggested that a further tranche of funding was to be made available. It was agreed to amend "further tranche" to "further consultation".

Minute Number 4, paragraph 3, should read "MAPPA" not "MAPA". Also in this paragraph, the boards referred to were the Children's and Adults Safeguarding Boards.

Matters Arising

- a) Ginny Blackoe provided an update that a sustainable services review had been commissioned which intended to consider the reconfiguration of Health Services working in an integrated way with social care were to be organised in the future. A consultation process had been commenced and it was understood that the Programme Board met that morning and was chaired by Tony Hill. PriceWaterhouseCooper had been commissioned to undertake the review within a timeframe of four months. The review would be informed by four specific focus groups – acute care, women and children, prevention and early intervention management.

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CHILDREN AND YOUNG PEOPLE STRATEGIC PARTNERSHIP 7 AUGUST 2013

- b) Chris Cook provided an update regarding autism, advising that the Head of Children with Disabilities was to link into a project for an autism pathway which would be scoped over the next four weeks.
- c) Minute number 6, resolution 2 – Youth Housing – the Chair confirmed that the strategy could not be presented at this meeting as it had been deferred from a previous meeting of the Children & Young People Scrutiny Committee and was only considered the previous week. This would be considered at a future meeting of the Partnership, once available.
- d) Minute number 8 – Inspection Update – a new framework would be launched for consultation in September 2013 with an expected roll out of inspection start dates by November 2013. OfSTED had confirmed that they would not be undertaking any more child protection inspections until the new framework came in to place.
- e) Minute number 9 – Multi Agency Safeguarding Hub (MASH) – Chris Cook explained that this was managed through the Public Protection Board, of which he was Chairman, and reassured the Partnership that this would be taken forward.
- f) Minute number 10 – Northumberland's Approach to Risk Management – Stuart Carlton advised that a project manager had now been appointed which would provide capacity to be able to consider how this could be implemented. Partner arrangements would also be considered in coming months.

RESOLVED

That the minutes of the previous meeting held on 17 April 2013 be confirmed and agreed as a true record.

17 CYPSP CHAIRS COMMENTS

The Partnership received an update from Debbie Barnes, Chair, which highlighted key areas to the Partnership:-

- a) Additional Capital Fund bids had been submitted for Further Educational Colleges, a number of which had been successful, which meant enhanced support for post-16 learners with Learning Disabilities could now be offered. Linda Houtby formally noted her thanks for the support received from Lincolnshire County Council during the bidding process and confirmed that they were the only successful bidder for post-16 LD in the East Midlands.
- b) A further award of £3m had been received towards capital for new schools places.
- c) Lincolnshire was seeing a small expansion in the number of free schools. Schools in Boston and Spalding had been opened plus an alternative provision free school in Lincoln. There were also proposals for two secondary free schools in Lincoln and Newark.
- d) A further 10% cut to Local Authority spending as part of the Comprehensive Spending Review was confirmed from 2015. Schools were protected under a minimum funding guarantee.
- e) The Chair announced that Meredith Teasdale, Assistant Director for Children's Services, would be leaving the authority and moving to

Cambridgeshire. She formally noted the Partnership's thanks and wished her well for the future.

RESOLVED

That the update be noted.

18 LSCB CHAIR COMMENTS

The Partnership received an update from Chris Cook, Chair of the Lincolnshire Safeguarding Children Board:-

- a) An appointment of a Child Sex Exploitation (CSE) Coordinator had now been made.
- b) Following recent Serious Case Reviews, it was acknowledged that the media focus was on Social Care. It was, in fact, multi-agency failure and something which would be actively worked on.
- c) A further Serious Case Review was anticipated following a trial set for October 2013.
- d) Child Sex Exploitation – a number of action plans from different government agencies, with similar content, had been issued. As a group of independent Chairs, they were currently trying to guide the centre in having one action plan. As noted above, a coordinator had now been appointed and a lot of work undertaken already.
- e) A Task & Finish Group was underway in relation to an elearning package on exploitation which had been developed with pathways and lesson plans. Joint working with Barnardos nationally had resulted in them being prepared to fund the package, giving Lincolnshire unlimited licenses. Merchandise with relevant numbers, website details, etc, was currently being investigated to circulate to young people. The Partnership noted their formal thanks for the work undertaken and the success so far.
- f) A conference had been organised around the newly emerging drugs and illegal highs. The police were also working with Trading Standards but it was suggested that this should, also, be multi-agency and be better tied together.
- g) A Child Sex Exploitation (CSE) conference was to be arranged in November 2013 but no details had yet been received. It was expected this would be an East Midlands Regional Conference with the venue possibly being Newark.
- h) A Lay Member had also been appointed for the Children's Safeguarding Board.

RESOLVED

That the update be noted.

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CHILDREN AND YOUNG PEOPLE STRATEGIC PARTNERSHIP
7 AUGUST 2013

19 ACTION GROUP UPDATES

(a) Lincolnshire Participation Action Group

The Partnership received an update from Kerry Mitchell with regard to the Lincolnshire Participation Group (LPAG), which made reference to the following issues:-

- Anti-bullying – It reported that a three year strategy had been suggested, which would involve a lot more work being done;
- Anti-bullying film. It was noted that media based companies already being used would be approached;
- Lincolnshire Participation Action Group – The Partnership were advised that the group were not a consultation group;
- Some discussion was had as to whether the Partnership felt comfortable having anti-bullying being featured so strongly in the last two iterations of the plan. As a result of a news release following the suicide of Anna Smith in Lutterworth, it was felt that bullying now had wider safeguarding issues and that more could be done under the broader scope of safeguarding, as more resource was available;
- Inclusion of bullying on the Safeguarding website was a priority; and
- The need to go into schools and colleges to re-educate pupils and students with regard to bullying.

In conclusion, the Partnership agreed that the issue of bullying needed to be strategically shifted so that it was located in the plan, as more of a safeguarding issue rather than an educational issue. The Safeguarding Board would then be able to scrutinise it.

RESOLVED

That the issue of bullying be moved in the plan to become more of a safeguarding issue rather than an educational issue.

(b) 14-19 Partnership (RPA)

No update was received in respect of this item.

20 CYPSP TERMS OF REFERENCE AND GOVERNANCE ARRANGEMENTS

Consideration was given to the Lincolnshire Children and Young People's Strategic Partnership – Governance Arrangements and Terms of Reference 2013/15. A copy of the Terms of Reference had been circulated to members of the Partnership to consider before the meeting.

David McWilliams, Head of Performance Assurance presented the Terms of Reference to the Partnership, making particular reference to:-

- Paragraph 1.3 – The Partnership's responsibility for monitoring the extent to which the partners act in accordance with the Children and Young People's Plan and the publishing of an annual report. It was highlighted to the Partnership that this now needed to be presented to the Health and Wellbeing Board;
- Paragraph 5.1 - Bullet point seven, the Partnership were advised that participating would mean 'participating fully in the work of the CYPSP through attendance (a 70% attendance rate was expected and would be recorded), active participation (monitored through auditing of completion of key actions identified at CYPSP)';
- Paragraph 6.2 - That agenda and papers would be sent out at least seven working days before each meeting;
- Paragraph 6.3 - That the minutes would be distributed within ten days of the meeting. This matter would need to be discussed further with Democratic Services;
- Paragraph 6.4 – Declarations of representatives interests';
- Paragraph 9.0 - Principles, it was highlighted that there should be six principles and not three as detailed; and
- Paragraph 11 – The Accountability Framework.

Discussion ensued, from which the following issues were raised:-

- Inclusion of the Lincolnshire Participation Action Group;
- Consequences of not hitting the required attendance. The Partnership were advised CYPSP had no formal powers but it was hoped that expected standards and making this public would influence behaviours;
- Substitution - The terms of reference provided that only representatives or a person nominated as a named substitute would be able to attend meetings in their absence. Members were encourage to nominate a named substitute as this would indicate a commitment to the committee;
- Health Providers – It was felt that there was a need to agree who they are and what the linking mechanisms were. Some members felt that health representation was a key link;
- Head Teachers potential representation;
- Process for dealing with non-attendance of staff;
- Agenda Structure and advance advertising. Concerns were raised regarding the layout of the agenda as it was felt that it was hard to identify which items required a decision and which were for information only. Reference was also made to the potential for meetings being conducted by telephone/video conferencing;
- Provision of papers seven days before the meeting. It was suggested that members who were unable to attend the meeting should provide a written update for the Partnership to consider; and
- The need to get draft minutes circulated within 10 days. A suggestion was also made to having updated actions when the papers were distributed.

In conclusion, David McWilliams advised that development day activities should structure the work of the partnership and would also help in deciding who should be included around the table. It was also the intention to keep membership broad, but meetings could be much more focussed around the plan.

Members were advised that the comments raised would be considered and incorporated.

RESOLVED

That the CYPSP Terms of Reference and Governance Arrangements presented be noted and that the comments raised be noted.

21 EARLY HELP OFFER & EARLY HELP STRATEGY

Stuart Carlton, Assistant Director for Children's Services presented to the Partnership Lincolnshire's Early Help Offer and Strategy. The Assistant Director highlighted that the draft document was at a very early stage of development.

Members of the Partnership were invited to express their views on the documents presented.

During discussion, the following issues were raised:-

- Early Help Offer document – some debate was had relating to the early help for families that the four outcomes steered towards children and that it was difficult to bring the two areas together. Others felt that the four outcomes for families did impact on children and should be included.

It was agreed that the document would be tidied up, followed by stocktake, the document would then help everyone to work together.

The Partnership then gave consideration to the Early Help Strategy. The Assistant Director advised that the document would be reviewed and refreshed in order to modernise early help moving forward and that this should be started off in the governance of the children's partnership.

During consideration, the following issues were raised:-

- That a glossary was required for the acronyms;
- That the document highlighted a lot of crossover issues. Some questions were raised in relation to the timescale involved in order to reduce harm; and understanding the involvement of all partners; and
- Risk Strategy Management. A question was asked why the Council was looking at introducing a Risk Management System for risky behaviour. The Partnership were advised that there were a range of young people (teenagers) who displayed risky behaviours, and at the moment there was no process to strategically gather this data.

RESOLVED

That that the Assistant Director would take on board the comments raised when finalising the Early Help Offer document and the Early Help Strategy.

22 CHILDREN & YOUNG PEOPLE'S PLAN

David McWilliams, Head of Performance Assurance provided an update on the Children and Young People's Plan. The Partnership was advised that during the last fortnight the following items had been finalised:-

- The Local Authority Performance measures;
- The tying in of all Strategic documents; and
- That a finalised version would be available by the end of the month for comments.

It was reported that the plan would be presented to the September meeting of the Health and Wellbeing Board. It was then hoped that there would be a finalised version ready for sharing at the Development Day on 7 October 2013. The plan would then be considered by LSCB on 17 October 2013.

During discussion, Partnership members were advised that in relation to governance arrangements for individual organisations, partners would have to decide what they needed to do, but from a Lincolnshire County Council perspective the plan would have to go through the formal decision making process.

A question was raised as to whether an individual officer present at the meeting should be agreeing and signing up to the Plan. The Partnership was advised that the organisation had to formally sign up to the plan, but it was their decision as to how this was done. It was suggested the Terms of Reference should include that a corporate sign off was required.

RESOLVED

That the update on the Children & Young People's Plan be noted.

23 TEAM AROUND THE CHILD AUDIT

The Partnership gave consideration to a report from Paula Whitehead, LSCB Business Manager, which provided an update on the Team around the Child Audit.

It was reported that in January 2013, Lincolnshire Safeguarding Board had made a decision to conduct a multi-agency audit of cases within the Team around the Child Process (TAC). The decision had been made in order to assess the effectiveness of multi-agency early help as part of the Board's recently established Learning and Improvement Framework. The prioritisation of the audit had been prompted by two

significant cases, but also because of the wish to drive forward progress in multi-agency ownership Lincolnshire's Early Help Offer.

In guiding the Partnership through the report, particular reference was made to the recommendations shown at page 28 of the agenda, from which the following comments were made:-

- The Challenges for CAF TAC and with regard to resources and funding;
- Some concern was raised as to whether current processes were robust enough, and that more reassurance was necessary in areas such as arranging a meeting and managing the meetings. One member felt that the process should be as it was before the central administration team were disestablished. The Partnership was advised that in relation to early help, there was a statutory duty which did not just rest with the local authority, for some of the organisations it was a statutory duty. The Partnership was advised that the partnership board had agreed that the TAC arrangements were the way to deliver co-ordinated early help. If one agency now disagrees with that arrangement, then there were serious issues which needed further discussion. It was noted that the person initiating the TAC could delegate their meeting arrangements to their administrative support, but it was their responsibility to follow the process through from beginning to end. The Partnership was reminded that there needed to be focus on the outcomes of the audit and shared commitment to look to improve it. It was highlighted that from a safeguarding objective it was not to reassure anyone, but to be open and transparent as to what's happening, so that the Partnership can then address the issues and make an improvement plan. Once the new arrangements were put in place it would be the Safeguarding Board's role to undertake a further audit in six months' time and to make sure that things are working.

The Chairman extended her thanks to Paula Whitehead and the working party for their hard work.

RESOLVED

1. That the CYPSP agree to the establishment of a mechanism for effective quality assurance of the TAC process.
2. That the CYPSP agree to review recording arrangements and amend all paperwork for TAC processes.
3. That the CYPSP agree to make recommendations to agencies on expected standards of case supervision for TAC.
4. That the CYPSP agree to ensure sufficient resources are available so that practitioners have access to advice and challenge.
5. That the CYPSP agree to ensure the voice of the child is heard in all assessments, plans and reviews.

24 DOH HEALTH VISITING IMPLEMENTATION PROGRAMME

Consideration was given to a report from Ginny Blackoe, General Manager, Family and Health Lifestyles Services LCHS, which provided the Partnership with background and information relating to the Health Visitor Implementation Plan and provided an update as to the progress being made in Lincolnshire.

The General Manager highlighted to the Partnership that since writing the report, she had been contacted by NHS England who had advised that they were looking to have four nurses with specific criteria for working with young mothers, first time pregnancy, etc. in the first two years of a child's life. Members were advised that this matter was to be discussed further at a meeting due to held in September. It was noted that a further report would be presented in six months' time.

During consideration of the report, the following comments were raised:-

- Whether enough had been linked relating to the two year review and the two year old child. The Partnership were advised that this work was in progress;
- Delivery of the healthy child programme now that flexibility had been removed – It was reported that it was proving more challenging but that it was being addressed. The DoH had been advised that the trajectory would be met and that work was on going to meet that; and
- In relation to recruitment were there any hotspots struggling. Members were advised that if people worked and qualified with Lincolnshire then they would be given a job, but people would have to go to where they had been allocated. It was highlighted that people needed to accept that they worked for a health visiting service in Lincolnshire, and as such could be asked to work anywhere in the county. It was highlighted there was no longer an additional demand in the East Lindsey area, as the workforce had been apportioned differently.

RESOLVED

That the report be noted.

The meeting closed at 4.10 pm

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**Strategy Review Board (Draft)
Wednesday 11 September 2013**

Present: Michael Follows (Chair)
Ken Durrands
Pete Thompson (Sir William Robertson)
Michelle Andrews (Interim Head of Service Property and Technology Management)
Adrian Clarke (School Reorganisation Officer)
John Jefferies (CfBT)
Pat Eccles (CfBT)
Darren Miller (Mouche)
Harvey Harrison (Mouchel)
Rosemary Simpson Eades – minutes

1. Apologies for absence

Simon Hardy
Simon Pickett
Scott Healy
John Beswick
Andrew Hearn

2. Introductions

Introductions were made around the table.

3. Elect Chair

This new group (Strategy Review Board (SRB)) has been formed to look at implementation going forward. Nominations for Chair and Vice Chair were put forward. KD proposed MF as Chair of Strategy Review Board and JB as Vice Chair, and AC seconded both. All members of the Board were in agreement.

4. Review Terms of Reference and agreeing purpose and remit of the Strategy Review Board

AC provided copies of the Terms of Reference taken from the contract with Capita. Reference was made to the mis-named clause 12 (should be clause 15) (Services Improvement) and discussion took place with regard to amending the Terms of Reference. **AC to action**

Strategy Review Board to feed reports to Schools Forum with issues being fed back in turn to SRB.

MF enquired about a report from Capita and AC explained that none had been received. AC reported the lack of Capita representation at this meeting and explained that although he has named contacts at Capita no confirmation of who would attend had yet been received. **AC to chase**

KD commented that Schools Forum controlled funding is backing this project but he has never seen a contract. Clear goals need to be achieved. MA to check on the funding details with other colleagues and AC to issue funding information

from Tony Warnock. AC referred to Project Closure Statement which contains total contract funds.

Update – following this meeting MA asked DB for clarity and she confirmed that DSG funded only the training element of the VLE

5. **Update and overview of progress**

LCC – AC explained his engagement with Mouchel and Capita in setting up a Service Implementation Group. Confirmation is needed from Capita as to what was in the original scope of work. Clarification is essential from Capita of functionality pertaining to CfBT, schools etc. Marketing remains an issue which has not been pursued as well as it should have been. AC to compile a log of questions with answers provided.

There is no cohesion technically following the departure of Cris Treacher on 31 August. MA to revisit provision of technical expertise and if it is required.

There is a need to extract as much value from the contract with Capita as possible in the remaining time (3 years into a 5 year contract) and look at other strategies to re-engage people and move forward.

Capita – no input

Mouchel – DM said Mouchel would continue to provide support with the project. There has been a period of stability prior to migration but since then 6 calls had been received from schools with queries regarding migration and Broadband switchover.

CfBT – it was reported that out of the 120 schools where the system has been deployed 87 have requested training and are all trained. Technical issues have hampered training causing dissatisfaction. There is potential for increased usage if technical issues can be resolved. It was reported that some settings / permission appear to have been lost during migration. HH explained migration to Cloud based environment saying that all content is still there and is being backed up. Now looking at hosted environment in the Cloud. Schools need to be aware that the usability of VLE has changed. **Action - notify the schools that the system is being backed up and all content is still there. Go back to Capita to migrate data**

A separate meeting with Capita/LCC/Mouchel to be set up to discuss migration issues / concerns. **MA to take forward**

HH to confirm Capita's contractual responsibility to provide infrastructure (contract between LCC and Capita)

6. **Feedback and discussion about VLE and the survey results**

AC provided an update on results of survey recently undertaken. Of the 160 schools expressing an interest 24 returns were received. 4 stated that VLE was deployed at their schools although no one was using it actively; 20 reported they were not aware VLE had been deployed and out of those 10 showed a

willingness to look again. Further marketing may help. AC was thanked for his work with the survey.

7. **Future development, engagement and promotion of VLE – item deferred**
8. **Agree content and requirement of report to Schools Forum**
MA to write a report for Schools Forum. Content to include technical delay, schools uptake.
9. **AOB**
None
10. **Dates and venues for future meetings**
Wednesday 2 October 2013 11.00am in Committee Room 5, County Offices, Lincoln

Dates of Strategy Review Board meetings

Wednesday 11 December 2013 1pm in Committee Room 5 County Offices

Wednesday 12 March 2014 1pm in Committee Room 3 County Offices

Wednesday 11 June 2014 1pm in Committee Room 3 County Offices

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Open Report on behalf of Director for Communities

Report to:	Lincolnshire Schools Forum
Date:	09 October 2013
Subject:	School Collaboration on Resource Efficiency (SCoRE) update

Summary:

The report provides an update on recent activity. Following the agreement of the Forum the Schools Collaboration on Resource Efficiency (SCoRE) programme is being implemented. The programme takes a whole school approach and supports schools in reducing their energy bills and spend. 60 schools have already completed the programme and it is planned to continue at a rate of 30 schools per term. Investment in proven technologies (such as boiler optimisation) follows and Frameworks have been established to obtain best value. Automatic metering has been put in place wherever possible and data is now available and visible. Monthly reports will be sent to schools showing gas and electric consumption. Programme spend is in line with agreed profile.

Actions Required:

That progress is noted.

1. Background

1.1 This report provides an update on the following strands of action that support schools in reducing energy consumption and bills.

1.2 Schools Collaboration on Resource Efficiency (SCoRE)

The SCoRE programme is now being rolled out across the county. Two SCoRE officers are employed by Keep Britain Tidy and seconded to the county council. They work full time on recruiting, training and supporting Lincolnshire schools with the elements of the SCoRE programme. There are three strands to the programme

- Behavioural and low cost savings
- Strategic investment in boiler room improvements

- Supporting investment identified in action plans in proven technologies

Each strand has the potential to deliver savings on energy consumption and spend. Schools need to remain committed, with energy consumption high on their agenda to maintain these potential savings long-term as direct support from their SCoRE officer is withdrawn. There is confidence that reductions can be maintained with investment of appropriate technologies and improved energy management behaviour in the school.

SCoRE is funded through the DSG underspend and therefore available to all schools, including academies. The programme works with geographic clusters centred on a secondary and their key feeder primaries. Students are essential to delivering the programme. The latest SCoRE background briefing and autumn newsletter are appended to the report (Appendices A and B).

60 schools have so far completed the programme (Appendix C) and 31 autumn term participant schools have started their activities with a training day. Six training days have been held at Bourne Academy, The West Grantham Academy St. Hugh's, Sir William Robertson Academy (Welbourn), Branston Community Academy, The Peele School (Long Sutton) and Banovallum School (Horncastle).

Schools begin the active phase of work with a training day for carbon ambassadors, a building audit and action planning before implementing quick win actions in an 'action week'. It is planned to involve 30 schools a term, although this is partly governed by schools' motivation and sign up!

1.3 Investment in energy efficiency technologies.

The procurement process establishing Frameworks for boiler optimisation and boiler room insulation is complete and implementation will start in SCoRE schools in the autumn term. This investment is carried out at no cost to the individual school.

As part of their work schools put together an action plan which details investment opportunities and their business cases. SCoRE facilitates that additional investment through a number of routes. Guidance has been prepared to assist schools. The guidance provides advice for academies on sources of investment funds.

1.4 Automatic metering, monitoring and targeting.

It is important to recognise that installation of the automatic meters will not itself reduce consumption and save money. To be effective schools need to understand what the data is telling them and to act on it. Part of the SCoRE activity in schools provides training and understanding on how the data can be understood and acted upon. As they participate schools will receive energy reports monthly. Those reports are intended to go to head teachers, Chair of Governors and relevant contacts identified during SCoRE work.

All schools which can be set up automatically have been activated and data from installation date is available and visible. As part of SCoRE we will work with contacts to enable them to make best use of the data. Schools can request additional reports at any time.

1.5 Low Carbon Schools conference

In partnership with Climate East Midlands and East Midlands local authorities we are holding the above event on 7th March 2014. It is a one day conference for people who lead, manage, teach and govern primary and secondary schools, academies and colleges together with those from local government and further afield that provide services and support. This is to explore what a low carbon school means in practice, why it's a desirable goal from a financial, educational and environmental perspective and the various ways you can make it happen through a whole school approach. It will be both practical and inspirational and feature a range of good practice examples from across the East Midlands. Appendix D provides more information.

2. Conclusion

The SCoRE programme has made a good start with good levels of participation and significant savings made through quick wins and action weeks. Programme spend is on profile. Despite regrettable delays monthly consumption reports have been made available to participating schools and will soon be available to all schools with enabled meters. Boiler optimisation and boiler room insulation work will start in September.

3. Consultation

a) Policy Proofing Actions Required

n/a

4. Appendices

These are listed below and attached at the back of the report	
Appendix A	SCoRE background information
Appendix B	SCoRE autumn 2013 newsletter
Appendix C	Schools taking part in SCoRE and results
Appendix D	Low carbon schools event flyer (to follow)

5. Background Papers

No background papers within Section 100D of the Local Government Act 1972 were used in the preparation of this report.

This report was written by Douglas Robinson, who can be contacted on 01522 554816 or douglas.robinson@lincolnshire.gov.uk.

The SCoRE Programme



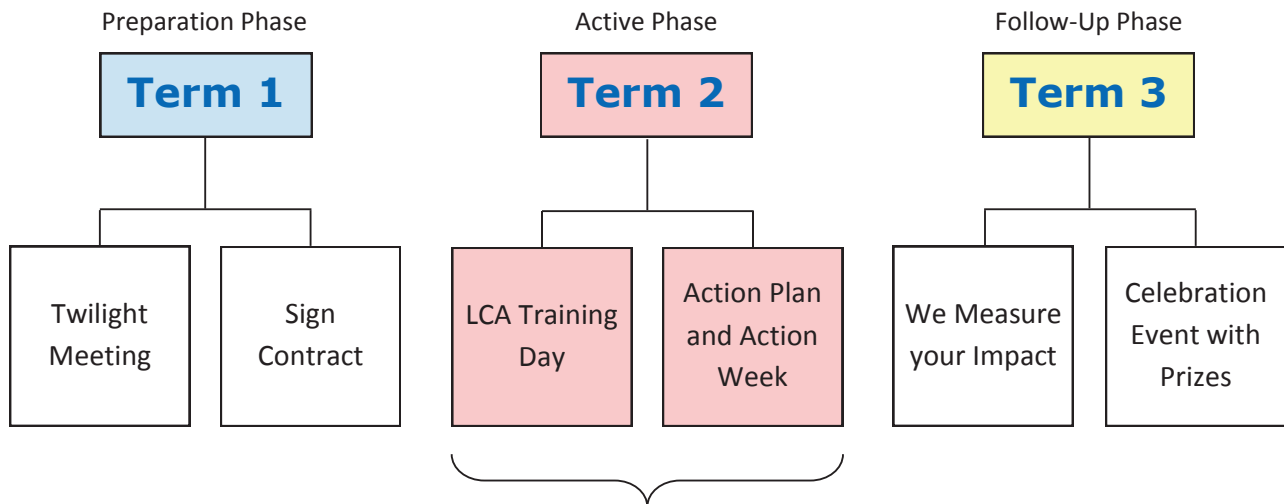
What is SCoRE?

SCoRE has been established by Lincolnshire County Council to help all schools become more sustainable. Participation is free for all schools, including academies. The Programme has been developed for upper KS2 and lower KS3 students taking an active role in their schools. We focus primarily on energy reduction to help realise immediate cost and carbon footprint savings. Registered schools have reported energy consumption savings of around 20% simply by making a few small changes.

What are the Benefits?

- ✓ Reduction in your school's utility bills and carbon footprint
- ✓ Free boiler optimisation technology and free valve and flange insulation for your school's boiler room.
- ✓ Special access to financial support for investing in energy-saving measures via our SCoRE Revolving Fund.
- ✓ Obtain a wider understanding of the environment and our impacts on it
- ✓ SCoRE is completely free to participate in!

How it Works - Project Timeline



For this term we work closely with your LCAs - approximately **1hour a week** see below for details

Lincolnshire Carbon Ambassadors

Three students from your school will be trained to become Lincolnshire Carbon Ambassadors. At a Training Day with other schools in your cluster they will be taught how to conduct a building energy audit and identify opportunities for action. They will then have the necessary skills to be able to complete an audit and action plan for their own school. The best Lincolnshire Carbon Ambassadors are students that are confident as well as numerically able. They will need to be able to implement their Action Plan, explaining to people why it is important and how much money and carbon can be saved.

Training Day Learning Outcomes

- Learn the principles of the Greenhouse Effect
- Learn how to conduct an Energy Audit and identify areas for improvement
- Learn how to prioritise improvements and develop an Action Plan

Action Week

Action Week will be your school's chance to put all the opportunities developed from the Energy Audit into practice. These should be the "quick win" low-cost or no-cost actions that could include holding an eco-assembly, active labelling of light switches or designating classroom energy monitors. Encouraging behavioural change and re-thinking everyday practice is essential; sustainability in your school should be "built-in" and not just "bolt-on".



Your Commitment

We ask for schools enrolled to commit approximately 1 hour a week to the Programme to get the most out of SCoRE. It is a staged Programme over four years and it should take on average one-to-two terms for a school to complete. After the training day, you will have fortnightly visits for one full school term from your LCC SCoRE Officer to help your LCAs through the process.

Do you have any questions about the SCoRE Programme? Please get in touch! Contact score@lincolnshire.gov.uk for further information.



SCoRE News

The SCoRE Programme, aimed at bringing sustainability into schools, has just completed its first year of action

60 schools have now finished SCoRE and are not only celebrating their achievements but also continuing their hard work by taking steps towards making long-term changes. SCoRE has been very successful to date; schools are seeing on average a **10 - 15%** decrease in energy usage and CO₂ emissions across a full term. This is attributable to simple behavioural change actions identified and implemented by their very own pupils. Specially trained Lincolnshire Carbon Ambassadors (LCAs) at each school have been raising awareness about energy saving and have been involved with activities such as running competitions to see which class can leave the least number of lights and appliances on stand-by each week.



Emily Neville
SCoRE Officer
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Case Study: Marton Primary School

A HUGE WELL DONE to Marton Primary School, near Gainsborough. They managed to reduce their electricity consumption by a whopping **50%** across Spring Term 2013. The LCAs at Marton got involved in lots of fantastic activities to help their school to be more sustainable. This included checking for furniture blocking the heaters, restricting iPad charging overnight and hosting their own Energy Saving Roadshow to get the whole school engaged in exciting games centred around energy reduction. As a result, Marton were the overall winners of the 'biggest percentage reduction' prize.

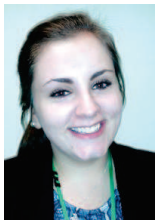
Ben Stephenson, Headteacher at Marton Primary School, had this to say:

"Key to our success at energy saving was the commitment of the pupils, particularly the Carbon Ambassadors and the commitment of the staff to make changes. Not just during action week, but long term.



Cllr Brailsford and Jonathan Parkin present Marton's LCAs with certificates

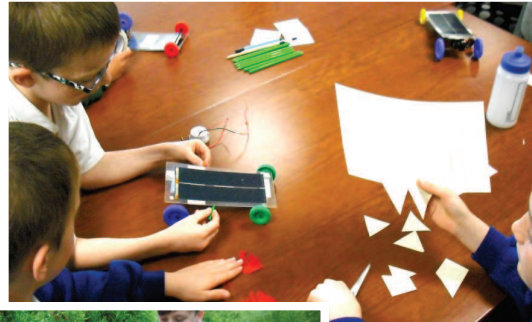
The energy reduction long term has included many factors. They include: changing our lighting to LED; using mobile devices which only require charging rather than desktop PCs; monitoring use of IWBs and projectors"



Lucy Wilkinson
Business Admin
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First Celebration Events

After a term of hard work and energy saving, our first schools attended Celebration Events - held at Hemswell ECO Plastics, Whisby Nature Reserve and The Princess Royal Sports Arena (Boston). These events are to celebrate the achievements of the schools; find out exactly how much energy has been saved and review and update their Action Plans. Pupils also discuss what it takes to be an LCA, ready to recruit their replacements for the following year. A popular part of the day involves building and decorating solar powered cars and racing them! At the end of the events, all the LCAs and schools were presented with certificates and badges by Councillor Brailsford, who kindly attended.



New Team Member!

We would like to welcome Emily as the newest member of the team, who will be working with schools from September. Emily Neville is taking over from Frankie Bowen as SCoRE Project Officer. We would like to thank Frankie for all her effort over the last year in getting SCoRE up and running and to wish her the very best of luck for the future in her new job.

Boiler Room Improvements

As part of the SCoRE Programme, schools receive free boiler load optimisation technology and flange and valve insulation for boiler rooms. The tenders for these improvements have arrived which means schools will soon be able to have these energy saving measures installed and begin to see further reductions in energy consumption.

The SCoRE Team are always ready to recruit the next set of schools onto the SCoRE Programme. If you would like your school to be involved, we would love to hear from you! Please send an email to score@lincolnshire.gov.uk and we will get back to you.

Document E

Acronyms

DSG	Dedicated Schools Grant
DSB	Dedicated Schools Budget
ISB	Individual Schools Budget
AWPU	Age Weighted Pupil Unit
MFG	Minimum Funding Guarantee
DfE	Department for Education
SFVS	Schools Financial Value Standard
ESG	Education Support Grant
LA	Local Authority
PVI	Private, Voluntary and Independent providers
EYSFF	Early Years Single Funding Formula
PFI	Private Finance Initiative
CERA	Capital Expenditure from the Revenue Account
MTFP	Medium Term Finance Plan
SEN	Special Educational Needs
DFC	Devolved Formula Capital
HN	Higher Needs
LAC	Looked After Children

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Document F

Schools' Forum Work Programme

DATE	ITEMS
9 October 2013	See today's agenda
Items for Future Meetings	January 15 2014 <ol style="list-style-type: none">1. School Funding Arrangements 2014/152. Academies Update3. Energy Update4. Outreach Review5. Growth Fund – Criteria and Allocations 2013/14

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