

Lancashire Schools Forum

eNewsletter



• Issue 125 • October 2022 •

Fair Exchange?

Welcome to Issue 125 of 'Fair Exchange?' a Post-Forum Edition of the eNewsletter of the Lancashire Schools' Forum. This issue deals with matters considered at the Forum meeting of 18 October 2022

De-delegations 2023/24

Following the consultation process undertaken with schools early this term, the Schools Forum decided that the following services would continue to be de-delegated in 2023/24 in primary and secondary schools:

- Staff costs – Public Duties/Suspensions;
- Heritage Learning Service – (Primary Schools Only);
- Support for Schools in Financial Difficulty,
- Inclusion Hubs (Primary Schools Only)

Funding relating to these services will be delegated to schools in the first instance, however, it will then be de-delegated from maintained primary and secondary school budgets so that the services can be provided by the LA. The final net delegated budget available to each maintained primary and secondary school would then exclude these amounts.

These services will be offered as group buy backs to schools in other phases, as appropriate.

Schools Improvement Functions De-delegation 2023/24

Members raised concerns regarding the information provided for the School Improvement Functions de-delegation for 2023/24.

As a result, the service has provided further information. The additional report is available on the Schools Portal and a link to the consultation questionnaire is [here](#), the deadline for responses is 8th November.

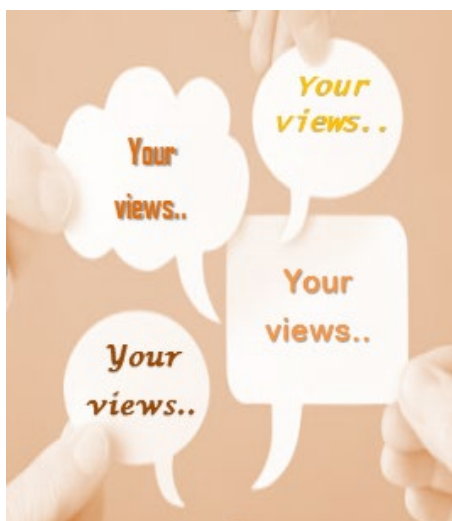
Consultation responses will be presented, and forum members will formally vote on the De-delegation at next Schools Forum meeting on 9th November. The outcome of the vote will be shared via the Portal and in the next edition of the Fair Exchange.

Minimum Funding Guarantee (MFG) 2023/24

The autumn term consultation also sought views on the level of Minimum Funding Guarantee (MFG) to be applied in Lancashire for 2023/24.

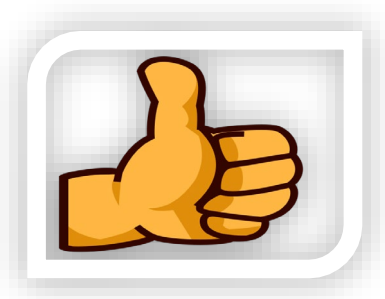
Consultation responses favoured the proposal to provide the maximum level of protection allowable by the DfE from April 2023 and supported the MFG being set at +0.5%.

The positive +0.5% MFG figure will be used in the finalising 2023/24 school budgets in Lancashire, which will be issued in February 2023. This means that primary and secondary schools will receive at least 0.5% more pupil-led funding per pupil compared to 2023/24.



Thank You!

137 responses were received in the recent de-delegation and MFG consultation. The Schools Forum would like to pass on a big thank you to all the schools that responded, as these views are crucial in assisting the Forum in making de-delegation decisions.



Future Consultation on Schools Block Transfer

In recent years, headroom has been available in the Schools Block once the National Funding Formula (NFF) methodology has been implemented in full. After consultations, this headroom has been transferred to other funding blocks to help mitigate funding pressures in other block (High Needs Block and Early years Block).

Initial modelling of the 2023/24 Schools Block allocations suggests that there will be pressure on the Schools Block from April 2023, so no headroom will be available and there are therefore no proposals to make a transfer from the Schools Block to other funding blocks in 2023/24.

If any headroom becomes available in the 2023/24 Schools Block when final allocations are issued from the DfE in mid-December 202 then schools and the Schools Forum will be consulted on any proposals before the 2023/24 Schools Budget is finalised.

Clawback 2023/24

Please remember that following a period where clawback has been suspended, the Schools Forum has agreed to reintroduce the clawback policy on excess school balances at 31 March 2023. The current guideline balance is 12% of Consistent Financial Reporting (CFR) income for all phases of maintained school.

The Forum has agreed to raise the minimum balance threshold from £60,000 to £75,000 from 2022/23, taking into account inflation over the years since the last time that the minimum value was raised. This will provide smaller schools with a larger level of allowable balance as a protection against future costs pressures.

Please also remember that the clawback policy will exempt 5/12 any funding received in advance that is funded on an academic year basis to schools by the DfE, for example Covid catch up funding. As clawback was suspended at March 2022, no 100% clawback rate will be applied at March 2023.

The Forum have agreed that the reintroduction of clawback be kept under review to assess the impact on Lancashire schools. Further information was issued about the 2022/23 clawback policy via the schools portal on 12 July 2022.

Schools Financial Value Standard (SFVS)

There is a statutory requirement on all maintained schools to complete the Schools Financial Value Standard (SFVS) each year and to provide a copy of the completed return to the authority, by 31 March each year.

A formal core agenda item is included on the autumn term governors meetings and governing bodies must formally discuss the SFVS annually with the head teacher and senior staff and ensure that the standard is completed and returned to the LA by the DfE statutory deadline. Schools must ensure that they have arrangements in place to achieve completing the return with governor approval and submitting the SFVS to the LA by the DfE statutory deadline of **31 March 2023**.

The approved SFVS document should be uploaded on the 'Forms' section of the Schools Portal. This can be accessed via the schools portal home page under Forms > Finance > Schools Financial Value Standard.

The requirement remains in place for schools to submit information to the LA about any related party transactions as part of the SFVS submission. The DfE have provided a template for this purpose and a question on the checklist asks about this.

For further information and for the templates please see the DfE website [here](#).

If you have not already done so, we urge you to commence the SFVS process now to ensure your school will achieve submitting your governor approved return prior to the DfE statutory deadline of 31 March 2023.

Who's Who? - Forum Membership

Kevin Smith has now left Lancashire County Council and Kirsty Lister is now the Interim Schools Finance Principal Accountant.

A number of new members were welcomed to the Forum from September 2022, including:

Primary School Governors

- Daniel Baron, St Bartholomew's CE Primary School
- James Johnstone, Barrow URC Primary School
- Tim Young, Howick CE Primary School, Penwortham

Primary School Headteachers

- Angela Aspinwall-Livesey, St. John's Catholic Primary and Hillside Community Primary School
- Anna Smith, Burscough Village Primary School
- Sarah Robson, Ribby with Wrea Endowed CE Primary School

Secondary School Governor

- Jackie Lord, Penwortham Girls' High School

Private, Voluntary and Independent (PVI) providers of early years education

- Sharon Fenton, Rosy Apple Childcare Ltd
- Philippa Perks, University of Cumbria Pre School Centre

Short Stay School Governor

- Liz Laverty Shaftesbury High School

NASUWT Representative

- Steve Jones

Special School Headteacher Representative

- Claire Thompson, Headteacher at Moorbrook School

Secondary Headteacher

- Mike Wright, Headteacher at St Augustine's RC High School, Billington

Director of Education, Culture and Skills

- Julie Bell, Acting Director of Education, Culture and Skills

The Forum also thanked a number of other colleagues who were leaving/left the Forum, including:

- Sharon Alexander, Early Years Representative
- Eric Harrison, NASUWT Representative
- Peter Higham Special School Headteacher Representative
- Sarah Callaghan, Director of Education, Culture and Skills

A current Schools Forum membership list for the new academic year is available [here](#).

Questions?

Remember, if you have any questions about the Schools Forum, please contact Sylwia Krajewska, Forum Clerk, 01772 532476, or email schoolsforum@lancashire.gov.uk