

**Total Number of 24**

**Question 1 Are there any parts of the GFL that you require further clarification on?**

Sector	Yes	No	N/A	Did Not	Total
Primary	5	5	1	3	14
Secondary		5			5
Special	1	3		1	5
<i>Sum</i>	6	13	1	4	24
<i>Percent</i>	25.0	54.2	4.2%	16.7%	100.0

**Question 2 Do you agree with the proposed terms of reference of the Schools Forum?**

Sector	Yes	No	N/A	Did Not	Total
Primary	6	3		5	14
Secondary	3	1		1	5
Special	3			2	5
<i>Sum</i>	12	4		8	24
<i>Percent</i>	50.0	16.7		33.3%	100.0

**Question 3 Do you agree to the proposal to establish separate ISB allocations for primary and**

Sector	Yes	No	N/A	Did Not	Total
Primary	6	2	1	5	14
Secondary	4			1	5
Special			5		5
<i>Sum</i>	10	2	6	6	24
<i>Percent</i>	41.7	8.3%	25.0	25.0%	100.0

**Question 5 Do you agree with the recommended proposal of option 3 in order to cease the operation of clawback, and to provide the additional funds in the next financial year?**

Sector	Yes	No	N/A	Did Not	Total
Primary	11	2		1	14
Secondary	5				5
Special			5		5
<i>Sum</i>	16	2	5	1	24
<i>Percent</i>	66.7	8.3%	20.8	4.2%	100.0

**Question 7 Do you agree with option 4 to fund nursery classes on the basis of places rather than pupil**

Sector	Yes	No	N/A	Did Not	Total
Primary	11	2	1		14
Secondary			5		5
Special			5		5
<i>Sum</i>	11	2	11		24
<i>Percent</i>	45.8	8.3%	45.8		100.0

**Question 8 Are you content with the current arrangements for retrospective changes to statements?**

Sector	Yes	No	N/A	Did Not	Total
Primary	2	11		1	14
Secondary	2	3			5
Special			5		5
<i>Sum</i>	4	14	5	1	24
<i>Percent</i>	16.7	58.3	20.8	4.2%	100.0

## Question 11 Do you agree with the simplification of the mobility factor?

Sector	Yes	No	N/A	Did Not	Total
Primary	8	1	1	4	14
Secondary	4			1	5
Special			5		5
<i>Sum</i>	12	1	6	5	24
<i>Percent</i>	50.0	4.2%	25.0	20.8%	100.0

## Question 12 Do you agree with the proposal to increase the mobility allocation by £100,000?

Sector	Yes	No	N/A	Did Not	Total
Primary	7	5		2	14
Secondary	5				5
Special			5		5
<i>Sum</i>	12	5	5	2	24
<i>Percent</i>	50.0	20.8	20.8	8.3%	100.0

## Question 15 Do you agree with the proposal to remove the limiting factors/ceilings for mobility and primary small schools curriculum protection?

Sector	Yes	No	N/A	Did Not	Total
Primary	5	4		5	14
Secondary	3	1		1	5
Special			5		5
<i>Sum</i>	8	5	5	6	24
<i>Percent</i>	33.3	20.8	20.8	25.0%	100.0

## Question 16 Do you agree with the proposal to remove the EAL element from the AEN formula? If not, do you have any proposals for how the AEN allocation should be allocated?

Sector	Yes	No	N/A	Did Not	Total
Primary	6	6		2	14
Secondary	2	1		2	5
Special			5		5
<i>Sum</i>	8	7	5	4	24
<i>Percent</i>	33.3	29.2	20.8	16.7%	100.0

## Question 17 Should the funding for the School Library Service be delegated for Primary Schools?

Sector	Yes	No	N/A	Did Not	Total
Primary	7	5		2	14
Secondary			5		5
Special			5		5
<i>Sum</i>	7	5	10	2	24
<i>Percent</i>	29.2	20.8	41.7	8.3%	100.0

## Question 18 Should the funding for School Licences and Subscriptions be delegated?

Sector	Yes	No	N/A	Did Not	Total
Primary		9		5	14
Secondary		2	2	1	5
Special		4		1	5
<i>Sum</i>		15	2	7	24
<i>Percent</i>		62.5	8.3%	29.2%	100.0

**Question 19 Do you agree to the delegation of funds for Special school meals?**

Sector	Yes	No	N/A	Did Not	Total
Primary			14		14
Secondary			5		5
Special	1	4			5
<i>Sum</i>	1	4	19		24
<i>Percent</i>	4.2%	16.7	79.2		100.0

**Question 20 Do you agree to the delegation of funds for Special schools repair and maintenance of**

Sector	Yes	No	N/A	Did Not	Total
Primary			14		14
Secondary			5		5
Special	1		1	3	5
<i>Sum</i>	1		20	3	24
<i>Percent</i>	4.2%		83.3	12.5%	100.0

**Question: 1 Are there any parts of the GFL that you require further clarification on?**

Sector	Contact	Comment
Primary	Bursar	No further clarification of the GFL required. However the funding problem last year was caused by teachers' pay rising faster than the income stream. Is there a guarantee that this year staff pay will not rise more than 3.4% without further compensation from the
Primary	Chair of Governors	LEA attitude to deficit budgets in 2004/05 - those resulting from modest guaranteed increase? Will LEA continue to pay off schools deficits in spite of GFL?
Primary	Financial Consultant	I think it would have been helpful to Headteachers and Governors to have had a specific example. Otherwise there is a risk that they might be overwhelmed by the mass of numbers.
Primary	Headteacher	It appears that the GFL has resulted in a 1.8% increase for my school effectively cutting our budget if current inflation is taken into account, although pupil numbers are stable. Can anyone explain?!
Primary	Headteacher	We understand how baseline has been reached. However, we need more clarification on the calculation of the anticipated GFL.
Primary	Headteacher	It would be helpful to know why the GFL weighting is larger for Secondary than primary - an explanation and rationale (c/o the DfES I assume) would be welcome!
Primary	Headteacher	With 3.4% - 4% on top of last year's poor budget some schools will again end up in deficit. Will the LEA be paying off these deficits again at the end of the year?
Secondary	Headteacher	The Guaranteed Funding Level is based upon the 2003/04 budget using projected pupil numbers for January 2004, and excludes prior year adjustments (Pupil clawbacks/catering adjustment), SEN funding, Rates.  Using the above assumptions, the school would receive a 5.3% GFL increase in 2004/5
Special	Headteacher	School Standards grant to be given separately from budget share again this year?

**Question: 2 Do you agree with the proposed terms of reference of the Schools Forum?**

Sector	Contact	Comment
Primary	Bursar	We agree with the proposed terms of reference
Primary	Chair of Governors	As suggested the Forum is too big. There should be some safeguard against the Forum becoming too dominated by Headteachers. It could end up as a committee of Headteachers Council.
Primary	Headteacher	Do not see the point of non-voting representatives.
Primary	Headteacher	The number of Heads & Governors should be stated. Selection of members should be properly advertised/publicised rather than adhoc or rushed as this year.
Primary	Headteacher	Does the membership for Secondary Schools exclude reps from the City Academies - given that more schools are expected to receive academy status I wonder whether the Secondary membership should be reviewed to take account of this.
Secondary	Headteacher	I agree with the Schools Forum suggestion to allow for a smaller body so that being quorate is less difficult

**Question: 3 Do you agree to the proposal to establish separate ISB allocations for primary and secondary schools?**

Sector	Contact	Comment
Primary	Bursar	We agree to proposal to establish separate ISB allocations
Primary	Chair of Governors	I have insufficient information to give a view at this stage. It will depend on effect and impact on budget management.
Primary	Chair of Governors	This proposal is to freeze the present division of resources between primary and secondary schools. The gap in age-weighted pupil unit between £2,163 for an 11 year old and £2,823 for a 12 year old should be reduced. A decision to maintain this gap without continuing debate is undesirable.
Primary	Governor	Provided there is sufficient flexibility and a clear process to deal with charging pupil numbers in the primary and secondary sectors.
Primary	Headteacher	Whilst I agree with activity led funding as a principle, I remain unclear whether current national funding formulae supports this. There needs to be more detail and examples of how this benefits schools (or not!)
Primary	Headteacher	It seems reasonable to transfer funds from relevant ISB where there is a rise/fall in pupils
Secondary	Headteacher	Sensible
Secondary	Headteacher	This will enable the different setters to have informed discussions and give weighting to different Key Stages as they feel appropriate.
Secondary	Headteacher	Any method of reducing the impact of unpredictability in the school budget share would be beneficial
Secondary	Headteacher	But first the LEA needs to ensure that its methodology in establishing the separate ISB allocations takes account of the recent higher allocations for KS4 and undoes the adverse effect on secondary schools of absorbing some standards fund monies in the

**Question: 4 Do you have any initial thoughts on activity led funding and how you would like to see it implemented?**

Sector	Contact	Comment
Primary	Chair of Governors	As above. What will be the impact? Does this proposal reduce flexibility in how funding is allocated and spent?
Primary	Chair of Governors	Activity-led funding will not, of course, solve schools funding problems but the aim should be to distribute the available funding more fairly. The responsibilities of schools have risen enormously since the start of LMS and the present funding formula does not reflect this change. Any formula should aim to fund all schools (within the available funding) for the activities that they are statutorily
Primary	Chair of Governors	Activity led funding is undesirable, because it is likely to enshrine current practice, without obvious benefit in terms of fair distribution
Primary	Governor	It is important that any ALF model should not be prescriptive about school organisation or make incorrect assumptions about costs.
Primary	Headteacher	We need a great deal more information about this in order to consider your Question.
Primary	Headteacher	Cannot comment with no practical examples which would illustrate effects of different formulae
Primary	Headteacher	Preference would be to develop a resource allocation formula based on the specific needs of Southwark schools.
Primary	Headteacher	We clearly need to spend time working through the mechanisms for this. Some models of how it would work in practice would be
Primary	Headteacher	It would be helpful if 'activity-led' would be clearly defined as a starting point and a brief paper on an existing activity led formula be circulated to schools.
Secondary	Headteacher	We need further clarification on the benefits of activity-led staffing

**Question: 4 Do you have any initial thoughts on activity led funding and how you would like to see it implemented?**

Sector	Contact	Comment
Secondary	Headteacher	A slight concern about the reliability of the figures that activity led funding would be based upon. The figures assume that all the expenditure is typical (comparable year on year) however it fails to take into consideration the significant amounts of money that are spent on grant based projects.  The social inclusion fund would have skewed the figures towards the teaching staff costs for financial year 2002/03, when the grant projects came to an end this would have caused a shift in the figures. This can apply to many areas (EAZ North Southwark are to disband in December 2003), also the LEA employs numerous employees from schools but does not take onto payroll, hence the teaching staff figures are increased.
Secondary	Headteacher	It needs to be done carefully. Most important would be the number of teachers and classroom assistants needed r: number of classes as opposed to number of children - 3 children fewer in a class still needs a teacher, etc
Special	Governor	A specific formula relating to Southwark and also to Special Needs would help schools enormously.
Special	Headteacher	Developing a formula differentiated to suit need s of the range of southwark pupils would be more appropriate than "off the peg" from another borough. Could 'pupil charter' be included in the guarantee I.e. opportunity for visit to we concert by end of KS1 or KS2?
Special	Headteacher	No comment

**Question: 5 Do you agree with the recommended proposal of option 3 in order to cease the operation of Clawback, and to provide the additional funds in the next financial year?**

Sector	Contact	Comment
Primary	Bursar	We have suffered in the past with a local school keeping its numbers low until the January count when it contacts parents of potential pupils and offers places. The proposal will not solve this but a second date such as early September for another count would help. This would then allow for adjustment in funding to spread out a bit rather than taken as a clawback in one year but spread over one and a half years. Otherwise Option 3 is the best
Primary	Chair of Governors	The effect will reduce variation in budgets from one year to the next
Primary	Financial Consultant	There is probably no perfect system. On balance I would recommend that the present system be kept. This is because schools with falling rolls do need protection. Also because, even in schools with rising rolls, the increase is not constant, and one can foresee huge problems with a percentage increase being achieved, and then being lost again, within the same academic year. For schools with rising rolls I suggest that a percentage based application system is not the best. Let us take a school with a £35,000 budget surplus carried forward. A 3%+ increase in School Roll is affordable until the next financial year. On the other hand, if a school only has a small surplus to carry forward or a deficit, any increase in School Roll can cause enormous financial problems out of all proportion to the increase in Roll. Can a system be devised that links the increase in School Roll with the percentage of reserves carried forward by a school to allow schools with no money to claim on lower increases?
Primary	Governor	Provided the LEA devises a system for automatically triggering extra funds when pupil numbers increases of more than 3% or 10%
Primary	Headteacher	It is reasonable based on the assumption that most schools do have an increase of approx. 3%+ on a yearly basis.

**Question: 5 Do you agree with the recommended proposal of option 3 in order to cease the operation of clawback, and to provide the additional funds in the next financial year?**

Sector	Contact	Comment
Primary	Headteacher	It makes planning & staff recruitment easier as role fluctuations can occur which means that there are highs and lows but average figure remains constant.
Secondary	Headteacher	The clawback method magnifies the impact of pupil number shifts which will cause far more problems in a school with a falling roll than would be the case under the new format with a school with an increasing roll.
Secondary	Headteacher	Allows for greater financial stability and forward planning

**Question: 6 If No, which option would you prefer, together with any reasons for your preference?**

Sector	Contact	Comment
Primary	Headteacher	Continue current system as school continues to be full
Primary	Headteacher	Option 3 as it makes planning easier

**Question: 7 Do you agree with option 4 to fund nursery classes on the basis of places rather than pupil numbers?**

Sector	Contact	Comment
Primary	Bursar	I do not understand why Nursery school classes should be funded differently from other classes so do not agree.
Primary	Chair of Governors	PLASC is too near the start of the Spring Term to allow a controlled intake of new children. It also does not allow time to fill places of children that accept a place but don't turn up. (Some parents accept places at more than one school).
Primary	Chair of Governors	many of the causes of variation in nursery numbers are beyond any influence a school can have. However the proposal leaves open the possibility of funding excess nursery places. For example a school with 60 nursery places could only fill 30 places year after year. A mechanism may be necessary to prevent this.
Primary	Financial Consultant	If I have understood this correctly it means that a school that did not fill it's nursery would still get full funding? Therefore, I think that I have not understood this correctly
Primary	Governor	Provided successful nurseries can easily secure funding to expand.
Primary	Headteacher	Particularly helpful where mobility is an issue
Primary	Headteacher	If allocations are more on the maximum number of places available the nursery classes can cater for the needs of any additional
Secondary	Headteacher	But if the difference is minimal then I could live with it
Special	Headteacher	There are fluctuations in pupil numbers particularly now with the number of children moving to reception classes

**Question: 8 Are you content with the current arrangements for retrospective changes to statements?**

Sector	Contact	Comment
Primary	Bursar	The financial recompense for additional statemented pupils takes far too long. It was over 12 months before we saw our money! So are not content with present arrangements.
Primary	Chair of Governors	They are too complex. Schools (and officers) are spending too much time chasing incorrect payments and arguing over allocations.
Primary	Financial Consultant	If the objective was to simplify administrative arrangements, the consensus among schools seems to be that the current system does not work - there has been no improvement.
Primary	Governor	The system is sensible in principle, but assessments and payments need to be made more efficiently and backdated to the date the assessment was applied for.
Primary	Headteacher	Considerable difficulty balancing budget with increased numbers plus SEN needs not being addressed financially.
Primary	Headteacher	Still waiting response to query raised with finance re retrospective funding - letter sent 24/03/03
Primary	Headteacher	Please with other LEAs re funding changes to in-year statements. This is a HUGE issue in Southwark and the SEN Section do not keep accurate records, nor do they appear to communicate updates to LEA finance or schools!
Primary	Headteacher	Could potentially place too much of a strain on a schools budget as the school had to carry the cost until the following year.
Primary	Headteacher	This year we had several statements come through which put a big financial burden on us. Other years this would not be a problem - the lack of flexibility can be problematical.
Primary	Headteacher	School has suffered severe financial challenges this year as number of statements rose from 3 to 9. Schools application for extra finance when 5% limit reached does not seem to have progressed far at centre.
Secondary	Bursar	It makes retaining and paying staff too problematical
Secondary	Headteacher	Schools are expected to operate within the financial boundaries, they are not permitted to go into deficit and they are recommended to keep non committed surpluses within a 5% of SBS level. The current system causes schools to spend in one year and receive income in the next making it more difficult to ensure that the school is adequately funded while not amassing surplus balances.
Secondary	Headteacher	IT causes too many problems
Special	Governor	It is essential to give schools stability of funding, otherwise Special Needs provision is weakened.
Special	Headteacher	When pupils are assigned 1:1 support via theory statements mid-way through the year, the school has not secured additional funding to meet this need and so therefore current arrangements are not satisfactorily
Special	Headteacher	Could result in cash flow problems for individual schools
Special	Headteacher	Should be based on actuals by month basis. Retrospective funding is not representative enough



**Question: 9 Do you have any suggestions as to how new statements and changes to statements can be best handled?**

Sector	Contact	Comment
Primary	Bursar	I am sure some funds can be set aside and used to fund at least 50% of the additional costs, with the remaining 50% funded from the next year and clawbacks.
Primary	Chair of Governors	Statements should be funded as and when they are finalised. The money must come with the child.
Primary	Financial Consultant	Termly
Primary	Governor	By termly adjustments
Primary	Headteacher	Termly adjustments - LEA can balance accounts at end of financial year - easier than individual schools.
Primary	Headteacher	Termly adjustments would help keep education finance/SEN/schools working closer together and would help stop problems building
Primary	Headteacher	If a statement comes through in the first 2 terms of a financial year funding should be passed on immediately - we are owed over £50,000 at present - causing us some difficulty
Primary	Headteacher	At the very least, accurate records, regularly, would be helpful
Primary	Headteacher	Accurate prediction of contingency is difficult however there is a need to have some form of contingency budget heading/bidding to gain access to funding when it is needed. It may result in greater bureaucracy but at least funding could be made available earlier.
Secondary	Bursar	there could be a central contingency fund
Secondary	Headteacher	Ideally schools should be re-imbursed/charged immediately that statemented children join/leave the school. If the LEA cannot do this to the desire not to hold a central contingency, then it may help is a document is issues to the school immediately stating exactly how much change in circumstances of statemented pupils would affect the school in the current financial year. The school should then be allowed to accrue this figure in the accounts at the year end. This would mean that the LEA does not need to fund changes in the year, but that schools can account for the changes as if the funding were accurate. There may be cash flow implications but generally schools should be able to manage their cash flow due to the current up front funding of the SBS
Secondary	Headteacher	Contingency for this would need to be kept centrally
Special	Governor	An in depth discussion should be arranged, in order to hear a range of views.
Special	Headteacher	This relates mainly to mainstream and these colleagues needs to make a recommendation. Individual support must be provided by LEA if on statements for this school

**Question: 10 Do you have any examples of best practice from other local education authorities that we can follow up and review?**

Sector	Contact	Comment
Primary	Financial Consultant	Brent & Tower Hamlets both appears to be able to make termly adjustments to the satisfaction of schools.
Primary	Governor	Colleagues tell me that the Tower Hamlets system is more effective
Primary	Headteacher	Only worked for Lambeth and Southwark, both of which have/had 'bad' practice
Primary	Headteacher	Termly Payments?
Primary	Headteacher	Look at SEN OFSTED reports for Bromley & Kingston.
Secondary	Headteacher	LEA could send out a survey to selected LEA's
Special	Governor	In KCC individual bandings are open for negotiation

**Question: 11 Do you agree with the simplification of the mobility factor?**

Sector	Contact	Comment
Primary	Bursar	I agree with simplification but prefer option 2
Primary	Chair of Governors	I agree with the principle of simplification but wonder whether the proposals achieve this?
Primary	Headteacher	The suggested changes do not seem to simplify matters.
Secondary	Headteacher	It must be transparent. The mobility factor is important only after a high level - all schools in Southwark have to deal with mobility to a certain extent, but schools with the greatest need should have the money
Special	Headteacher	Not applicable - very little mobility here

**Question: 12 Do you agree with the proposal to increase the mobility allocation by £100,000?**

Sector	Contact	Comment
Primary	Headteacher	This would not assist this school
Secondary	Bursar	If only there is available funding
Secondary	Headteacher	Only if there is funding readily available without taking it away from other schools

**Question: 13 At what level should the threshold be set for the minimum level of funding – 10% or 20% or some other option? And if 20% should there be a lower allocation between 10% and 20% or no allocation**

Sector	Contact	Comment
Primary	Bursar	10%
Primary	Governor	10%/20% combined Option 6 seems most sensible.
Primary	Headteacher	10%
Primary	Headteacher	Don't know
Primary	Headteacher	10%
Primary	Headteacher	10%
Primary	Headteacher	No comment
Secondary	Headteacher	1st trigger 10%, 2nd trigger 20%
Secondary	Headteacher	20% mobility makes a really significant impact on schools and therefore should be adequately funded. A small school with say 200 students with 10% mobility would have 20 different students across 6 years - 3/4 per year not significant. Second choice would be
Secondary	Headteacher	0% - allocated directly on pupil numbers
Secondary	Headteacher	Option 6 with a stepped threshold at 10% and 20% appears best
Special	Governor	10%
Special	Headteacher	10%

**Question: 14 Do the weightings in option 6 with a 2:1 differential between 10% and 20% strike the right balance or should the weightings be different?**

Sector	Contact	Comment
Primary	Governor	I would lower a changed to the weighting - at present all but one of the primary schools with mobility above 20% will lose funding
Primary	Headteacher	Introduce a stepped threshold at 10%, 15% and 20%
Primary	Headteacher	Don't know
Primary	Headteacher	Seems sensible.
Primary	Headteacher	Agree with Option 6
Secondary	Headteacher	The weightings in option 6 appear to strike the right balance
Special	Governor	Option 6
Special	Headteacher	Option 6 is a fairer system

**Question: 15 Do you agree with the proposal to remove the limiting factors/ceilings for mobility and primary small schools curriculum protection?**

Sector	Contact	Comment
Primary	Bursar	No comment apart from preferring to keep the £10,000 limit for mobility
Primary	Governor	However small schools protection should not be necessary in such a densely populated borough. Small schools should either be expanded, merged or closed down.
Secondary	Headteacher	Unless relatively few schools skew the figures
Secondary	Headteacher	There must be some limits surely?

**Question: 16 Do you agree with the proposal to remove the EAL element from the AEN formula? If not, do you have any proposals for how the AEN allocation should be allocated?**

Sector	Contact	Comment
Primary	Bursar	No do not agree. Do not understand what the problem is in collating the EAL data. Using only FSM means there will be no funding for the problems we face of a high proportion of the children not speaking English. There is no correlation between FSM and EAL.
Primary	Chair of Governors	English as an Additional Language is a real measure of additional education need. May of the children are refugees whose homes and families have been devastated by war. Most are Black or Asian. Free School Meals (FSM) is a proxy measure. Children eligible for FSM do not necessarily have additional needs. FSM does not count children who are entitled to FSM: it counts claimants, but a number of parents who are entitled to FSM do not claim. If the funding formula were simplified by removing EAL, children of refugees will be deprived of additional support. If the funding formula were simplified by removing EAL, mainly Black and Asian children will be deprived of additional support. The single advantage of only using FSM is simplicity. The proposed change would make the formula less fair.
Primary	Chair of Governors	The calculation of EAL is not consistent across schools. Concern has been expressed on previous occasions and audit procedure promised but it does not appear to have happened. There is a feeling that some schools are taking advantage of the lack of monitoring. In view of it's failure EAL weighting needs to be removed from the formula.
Primary	Governor	Has proven attainment data been considered? At secondary level KS2 score is a good prediction of GCSE performance. An assessment on entering primary school could provide prior attainment data for primary school funding.
Primary	Headteacher	If kept, schools need training in determining the stages as some clearly put ALL of their EAL children down currently as 1-3.

**Question: 16 Do you agree with the proposal to remove the EAL element from the AEN formula? If not, do you have any proposals for how the AEN allocation should be allocated?**

Sector	Contact	Comment
Primary	Headteacher	EAL must stay in the formula - the problem is obviously with auditing the information. This should be addressed by the LEA - not just taken out because of 'difficulties'.
Primary	Headteacher	Need to recognise impact of EAL pupils particularly significant numbers could a similar proposal for EAL be linked to mobility with schools allocated according to percentage - need to review how data analysed and collected.
Primary	Headteacher	Allocate on basis of newly arrived pupils from non-English speaking countries.
Secondary	Headteacher	EAL needs to be funded properly, but there are schools which are double and triple funded as the same measure is used again and again - while other schools have nothing. This needs to be looked at very carefully to avoid huge winners and losers
Secondary	Headteacher	But only because I do not believe the EAL figures for Stage 1-3 can be verified. Subjective judgements are made which cannot be relied upon in all cases.
Secondary	Headteacher	For sufficient researching to go to EAL pupils, the EMAG Standards Fund allocations would have to rise by 50% (about 18% is planned at present). Additional resources could be targeted for the teaching of EAL pupils by allocating a proportion of the AEN funding based on numbers of EAL pupils in Stages 1-4
Secondary	Headteacher	Simplification of the formula and clarity of how it is calculated based on verifiable figures would be beneficial.
Special	Governor	It is important to ensure funding is used for correct purposes, but also essential to affect schools stability of staffing and pupil
Special	Headteacher	It is extremely difficult to moderate EAL across schools and I am sure there are inaccuracies

**Question: 17 Should the funding for the School Library Service be delegated for Primary Schools?**

Sector	Contact	Comment
Primary	Bursar	Once you allow the break-up of the monopoly then the overheads are shared by fewer and fewer schools and it become uneconomic. I suspect that schools, if they had the funds delegated ,would not use them for the purchase of books.
Primary	Chair of Governors	The SLS is a valuable service and needs the confidence of secure future funding.
Primary	Chair of Governors	Schools are best placed to decide how to use the funding.
Primary	Governor	Yes - But in allocating the funding the extent and quality of the schools own library/reading materials should be taken into account.
Primary	Headteacher	Schools should be able to use the money as they see fit.
Primary	Headteacher	Preferably held centrally to enable both facilities/resources to be made available to all schools.
Primary	Headteacher	We need to safeguard the central service as many schools depend on it.
Primary	Headteacher	Need to maintain a positive working library service with a consistent budget.
Secondary	Bursar	Only if the primary schools agree
Secondary	Headteacher	This should be decided by Primary schools
Secondary	Headteacher	Let the primary schools decide.
Special	Governor	Southwark Library Service should be maintained and Special schools have always valued this service, as it supplements our
Special	Headteacher	As a special school I would still like to keep SLS devolved. We have limited space available to store a wide range of books and
Special	Headteacher	No opinion. No longer use this service following review

**Question: 17 Should the funding for the School Library Service be delegated for Primary Schools?**

Sector	Contact	Comment
Special	Headteacher	Service should continue to be supported by LEA and schools

**Question: 18 Should the funding for School Licences and Subscriptions be delegated?**

Sector	Contact	Comment
Primary	Bursar	Wish I knew what licences and subscriptions are funded centrally to know whether we want to pay for them ourselves. Such a small sum does not seem important to have it ringfenced.
Primary	Chair of Governors	Delegation makes no sense whatsoever.
Primary	Chair of Governors	There are considerable economies of scale here.
Primary	Headteacher	Simpler to remain central
Primary	Headteacher	Any benefit from centralised rates should be capitalised
Primary	Headteacher	I do not see the point in wasting LEA officer time in reclaiming the fee from schools!
Primary	Headteacher	Keep as it is. Why waster money re-charging schools when benefit of scale is so great.
Secondary	Headteacher	Schools should continue to benefit form central purchasing, and delegation would further complicate budgets unless the LEA are clear as to how much schools would have to pay back to purchase licences, and invoice schools at the start of the financial year. Potential savings would be minimal.
Secondary	Headteacher	Economies of scale suggest no.
Special	Headteacher	Amount proposed for delegation to special schools is likely to be insufficient to cover costs.
Special	Headteacher	The figures are relatively small and seems pointless to delegate them
Special	Headteacher	Economy of scale should be retained

**Question: 19 Do you agree to the delegation of funds for Special school meals?**

Sector	Contact	Comment
Primary	Chair of Governors	At the agreement of the special schools.
Primary	Headteacher	Wish to support the views of special school colleagues here
Primary	Headteacher	No comment
Secondary	Headteacher	This should be decided by Special schools
Special	Governor	It would be very difficult for small schools and special schools to run an efficient catering service, due to small numbers and high percentage of Free School Meals
Special	Headteacher	Issues surround lack of cost-effectiveness due to small size of special schools, special diets. This school has a well equipped kitchen, but relatively few numbers. There are serious problems with the current contractor
Special	Headteacher	Southwark have still not provided sufficient detail of alternatives and costs involved. There needs to be a full discussion on this issue BEFORE a decision is made to delegate
Special	Headteacher	I still have concerns regarding the increased costs involved if special schools do not remain as one unit. However I am very dissatisfied with the current catering arrangements - children are receiving a poor quality service

**Question: 19 Do you agree to the delegation of funds for Special school meals?**

Sector	Contact	Comment
Special	Headteacher	We already run our own meals service. This would therefore be additional budget contribution

**Question: 20 Do you agree to the delegation of funds for Special schools repair and maintenance of kitchens?**

Sector	Contact	Comment
Primary	Chair of Governors	At the agreement of the special schools.
Primary	Headteacher	Wish to support the views of special school colleagues here
Primary	Headteacher	Special schools have the same issues as mainstream re repairs
Primary	Headteacher	No comment
Secondary	Headteacher	This should be decided by Special schools
Special	Governor	Yes. Kitchens have been neglected for years, but hopefully they are mainly in good & safe condition now.
Special	Headteacher	we have been managing the repair and maintenance of our kitchen successfully. We need more information and liaison between the LEA and special schools, together with an explanation of figure work in Appendix Jii
Special	Headteacher	we have always maintained our own kitchen and prepared our own food

**Question: 21 Do you have you any comments on the proposed changes to the Scheme for Financing Schools?**

Sector	Contact	Comment
Primary	Bursar	The level of £1,000 for referral of write off of debts is far too low. It needs o be over £2000 to even go to our Governors. Also as the bursar I sign cheques but am not a paid employee f Southwark or the governing body but a freelance consultant. Do not intend to change my status to meet this requirement so either you change the rules or I shall have to resign! Would be useful to actually see the new version, as the comments are too general to understand the implications.
Primary	Chair of Governors	Removing governors from the list of cheque signatories weakens their monitoring role.
Primary	Financial Consultant	It is impossible to comment without seeing a draft of the final documents.
Primary	Headteacher	Difficult to comment without having the scheme. I have a number of comments too numerous for these 4 lines and minus the current complete Scheme!
Primary	Headteacher	Prefer the scheme to remain in the same format.
Primary	Headteacher	Seems OK
Primary	Headteacher	Agree with proposals
Primary	Headteacher	It would be better to have a full draft available
Primary	Headteacher	No
Secondary	Headteacher	Important to allow Governors to be signatories on cheques
Secondary	Headteacher	We would wish to keep the option of using our own auditor and other professional services. Everything else seems fair.
Secondary	Headteacher	The changes appear to be appropriate
Special	Governor	Proposals agreed.
Special	Headteacher	No view, would rather see a draft version before commenting further

**Question: 21 Do you have you any comments on the proposed changes to the Scheme for Financing Schools?**

Sector	Contact	Comment
Special	Headteacher	none
Special	Headteacher	New Budget deadline has not been mentioned. 1/5/03 was unrealistic last time round. How can a revised scheme be enacted without knowing a proposed date.

**Question: 22 Do you agree with the methodology of allocating the loss in Standards Fund through the AWPU? If not, what methodology would you have preferred to have used?**

Sector	Contact	Comment
Primary	Chair of Governors	The funds should be used to make up the shortfall of funds lost from previous DfES funding.
Primary	Chair of Governors	It would be difficult to find another way of allocating the funding that would fall within the LMS formula.
Primary	Governor	Yes - Subject to GFL
Primary	Headteacher	lost 10's of thousands by allocating loss through AWPU - this did not seem to work for us
Primary	Headteacher	Given that GFL may prevent action, the Question may be irrelevant. Nevertheless some other methodology for allocation would be
Primary	Headteacher	The funds should be allocated to match the actual costs of lost funds previously provided by the DfES.
Secondary	Bursar	We would like some kind of standards protection in the future
Secondary	Headteacher	There should have been a mechanism to redistribute extra money for the loss of standards funds in the ratio primary: secondary as it was lost. Secondaries lost far more than they were paid back.
Secondary	Headteacher	The loss of Social Inclusion Funding in 2002/3 was a significant factor in secondary schools having serious financial difficulties. The AWPU calculation did not reflect the needs of schools hence funding was diverted away from areas that the SIF was intended to cover. The result of this is that many members of staff are now funded directly by the school, but were employed originally only because of the SIF grants.
		Standards fund grants should be directed towards the areas of need that they were originally intended, unless it can be shown that
Secondary	Headteacher	we would have preferred a methodology which allocated the compensating resources in proportion to the loss incurred by individual
Special	Governor	Unable to comment from Special perspective.
Special	Headteacher	We are unclear as to how additional funds were allocated to special schools to replace lost standards fund grant. AWPU are not used in special schools - a full explanation is needed
Special	Headteacher	Would be better if these amounts could be seen - perhaps under the retrospective adjustment

**Question: 23 Would you prefer to reduce the percentage threshold for cash flow problems for in-year statements? If so, what percentage should be used?**

Sector	Contact	Comment
Primary	Bursar	2%
Primary	Chair of Governors	See response to Question 9. This Question then becomes irrelevant.

**Question: 23 Would you prefer to reduce the percentage threshold for cash flow problems for in-year statements? If so, what percentage should be used?**

Sector	Contact	Comment
Primary	Financial Consultant	The 5% level has proved to be too high. Despite what is said in the Consultation Document, one school HAS applied for extra funding because the 5% level was reached. That application seems to have been delayed/deferred in a maze of checking, so that by the time the money arrives it will too late to make an sensible difference to this current financial year.  Licensed Deficits cost schools money. The attitude of the LEA that "it would look favourable on Licensed Deficit applications that result from higher SEN expenditure" overlooks this cost to schools, and the worries that Headteacher and Governors bear in trying to work out what they will do.  Schools with a large budget surplus to carry forward might be able to afford an increase in the number of children with Statements. Schools with no surplus to speak of, or a deficit already, cannot. The cost of the extra staff goes directly to their bank accounts.
Primary	Governor	Is it possible to link the percentage threshold with the level of reserves carried by the school? 2% would be more helpful
Primary	Headteacher	2% because many budgets are currently so finely balanced with minimal contingency.
Primary	Headteacher	2%
Primary	Headteacher	School has suffered here this year. Even when the school reached the threshold, extra funding was very difficult to claim. The school started the year in deficit and has had to bear £38,000 of salary costs itself. We suggest 1% threshold for schools in deficit
Primary	Headteacher	3%
Secondary	Headteacher	Cash flow payments should be made on request when schools foresee problems.
Special	Headteacher	2% perhaps could be used . Best system would be to fund in-year rather than retrospectively
Special	Headteacher	Currently not getting funds re changes to statements for 1:1 support for in-year

**Question: 24 Does the calculation of funding for maternity cover appear to be working satisfactory? If not, why not and can you suggest any improvements?**

Sector	Contact	Comment
Primary	Bursar	It is fine if the cost of the supply cover is less or the same as the maternity teacher. However that can not be guaranteed and I should of thought the equitable position was to pay for the additional costs incurred by the school. This may require more calculations as it would involve a calculation of what the maternity teacher used to cost, adjusted for what she now costs, with adjustment for cost of supply cover. In some instances you win, sometimes the school!
Primary	Chair of Governors	Cover should reflect actual cost of providing support for maternity leave. At present it is underfunded.
Primary	Financial Consultant	Virtually no maternity reimbursements have been received by schools this year, it is no possible to judge. The delay in reimbursements suggests that the system is no working satisfactorily.
Primary	Headteacher	Don't know - have had no maternity leave for 6 years - will have next year, though
Primary	Headteacher	LSA cover needs to be the actual cost of cover, maternity cover is much less than actual costs of employing an LSA.



**Question: 24 Does the calculation of funding for maternity cover appear to be working satisfactory? If not, why not and can you suggest any improvements?**

Sector	Contact	Comment
Primary	Headteacher	I am still trying to agree & recover my maternity cover costs. To send out the calculations done by finance department (I.e. show your working) would help in resolving discrepancy.
Primary	Headteacher	Schools should be re-imbursed for cost of supply teacher and NOT cost teacher on maternity leave as supply teacher coverage incurs additional costs which are met by current calculations.
Primary	Headteacher	It would be helpful if we knew what the funding arrangements are!
Secondary	Headteacher	The system works OK, the only problem is payroll providers do not always provide clarity in terms of SMP claimed which causes some
Secondary	Headteacher	Seems to be working
Special	Headteacher	we have little experience of this, but would urge clarity

**Question: 25 Do you agree with the decision to retain a contingency at 0.1% or should some other figure be used?**

Sector	Contact	Comment
Primary	Headteacher	So long as it remains as the minimum level.
Secondary	Headteacher	There must be some contingency, but it should be as small as possible.
Secondary	Headteacher	Any approach to financing that retains consistency is agreed, subject to the proviso, how is this money to be distributed should there be minimal errors/omissions in the formula.
Special	Headteacher	If this is sufficient - retain it!!!

**Question: 26 Do you agree with the reverse delegation of the Internal Audit function and the devolvement of the resources for this function?**

Sector	Contact	Comment
Primary	Bursar	Borough audits in the past have been less than useless. External ones were so much more comforting that we were on the right road, and that all deficiencies had been clearly identified. Would strongly object to going back to the old system and would advise the Governing Body to go independent.
Primary	Chair of Governors	Economies of scale and pooling of expertise justify this.

**Question: 26 Do you agree with the reverse delegation of the Internal Audit function and the devolvement of the resources for this function?**

Sector	Contact	Comment
Primary	Financial Consultant	I declare and interest here, in that I provided an Internal Audit service to three schools in Southwark in the past year.  It would be helpful to know: * Why from the LEA's perspective the devolvement of resources does not appear to be working satisfactorily. * Why the Director of Finance believes that he is less able to perform his Section 151 responsibilities than he was under the previous arrangements. Many LEA's outsource Section 151 responsibilities completely, and their Directors of Finance of not lose any sleep over this.  I have been able to provide a service to these three schools at a lower cost than that charged by the LEA. Unless there has been a Question over the quality of my work, of which neither I or the school have been made aware, it would appear that these three schools are acting in accordance with the principles of Best Value.  I reiterate my proposal made to senior staff of Atkins Education that I would be happy to discuss with the LEA either ways in which more of the Internal Audit function could be outsourced (to my declared potential personal interest), or in which the current Internal Audit function of the LEA might be improved (to my declared potential detriment). Schools should be able to get internal audit services from a range of suppliers.
Primary	Governor	Schools should be able to get internal audit services from a range of suppliers.
Primary	Headteacher	School uses the LEA internal audit function, but would wish to retain the option of using alternative suppliers
Primary	Headteacher	Schools should have set guidelines on the use of Auditors, but still retain the option to render the services of external auditors. Schools need to have a choice of suitable dates for audit to be carried out. However, if this is more centrally for an schools there will
Primary	Headteacher	Schools should be able to turn to alternative suppliers under the principles of best value
Primary	Headteacher	Schools should be free to choose from reputable suppliers with a knowledge of the education sector
Secondary	Bursar	We would want to retain the right to appoint our own auditors
Secondary	Headteacher	We would wish to have the option of choosing our own auditor
Special	Headteacher	We are more than happy with our present service provider. The only occasion we used the internal auditor they provided an
Special	Headteacher	Audit should be provided centrally

**Question: 27 Do you agree with the reverse delegation of the Health and Safety function and the devolvement of the resources for this function?**

Sector	Contact	Comment
Primary	Chair of Governors	UNLESS the Southwark H&S service can be significantly improved.
Primary	Chair of Governors	Economies of scale and pooling of expertise justify this.
Primary	Headteacher	If a school has an effective H&S provider why change? Again, with all schools using central provider, there will be limits on dates
Primary	Headteacher	Schools should be free to choose from reputable suppliers with a knowledge of the education sector
Secondary	Bursar	We would want to retain the right to appoint our own professional services

**Question: 27 Do you agree with the reverse delegation of the Health and Safety function and the devolvement of the resources for this function?**

Sector	Contact	Comment
Secondary	Headteacher	We would prefer to have a choice
Special	Headteacher	Health & Safety should be provided centrally

**Question: 28 Do you agree with the new revised SEN Bandings?**

Sector	Contact	Comment
Primary	Headteacher	There have been difficulties this year with some children with severe needs. Suggest an extra year with 5 bands to see how these
Primary	Headteacher	They do not translate very well to school day. Doesn't take into account provisions outside of the class/lesson time.
Primary	Headteacher	It would be better to undertake the review first. The bandings are unintelligible, and meaningless, without the details of how the bands were derived and the criteria used
Primary	Headteacher	BUT actual costs (with a limit to the scale point funded for an LSA or Specialist teacher) should be covered including on-costs.
Secondary	Headteacher	I find bandings unhelpful because they do not reflect the true cost of SEN Support. As one of my SEN support teachers is on the Upper threshold the funding does not match need.
Secondary	Headteacher	The 2003/4 revised SEN bandings in effect reduced funding for statements. This school had a loss of £12,000 or 8.5% cut at a time when teaching and support staff costs went up 10-16% and 6% respectively
Special	Governor	Mainstream consideration.
Special	Headteacher	Special Schools are not comparable with mainstream schools in this regard. The bandings for special schools need to be reviewed
Special	Headteacher	It still appears unclear. Criteria for banding is somewhat contentious and is not transparent

**Question: 29 Have you any suggestions for improvements in the way in which the SEN Banding system could work?**

Sector	Contact	Comment
Primary	Headteacher	A strategic plan needs to be devised before any system can evolve! Greater consultation with ALL schools needed
Primary	Headteacher	Criteria for Banding needs to be explicit before & after statements have been issued. Panels need to explain in greater detail their
Secondary	Headteacher	The funding for each band should cover the actual costs of the provision stipulated in the statements falling within the band. Bands A and B should fund 3 hours IST and 5 hours IST respectively, since these are the most popular statement provisions. The current costs for 3 hours and 5 hours IST are £4,961 and £8,269 (teacher on M6 with marking and preparation time)
Secondary	Headteacher	It must take in account the actual costs of providing the SEN Support whether for CA hours or IST hours
Special	Governor	SEN bandings used to fund special schools should be revised & a clarification of how bands are allocated to pupils.
Special	Headteacher	How are bandings moderated?? Can P levels be used as one indicator?
Special	Headteacher	Bandings in mainstream not discussed with specials as far as we know
Special	Headteacher	Clarify the statement criteria for each band

**Question: 30 Do you have any views on the criteria that should be used to assess the impact of the change in the SEN Bandings?**

Sector	Contact	Comment
Primary	Chair of Governors	Assessment should look at actual impact - does funding level pay the costs of the staff employed?
Primary	Headteacher	The funding must pay the actual costs of the staff employed.
Primary	Headteacher	* How well do the hours stated in bands translate realistically to the school day? * Funding associated with each Band sufficient to deliver hours - especially when specialist support is needed. * How much additional funds have been used to boost funding in Bands + where have the funds come from? * Number of appeals of Bands?
Primary	Headteacher	Make sure appeals panels stick to class size prejudice guidelines and slit the "lump sum" grant to include guaranteed expenditure on
Primary	Headteacher	Moderation across schools? What is the current criteria used to assess impact?
Secondary	Headteacher	The school is not currently in position to provide an opinion on the SEN banding review.
Secondary	Headteacher	The impact of the change should be clear if each school's stated allocation is calculated according to 2002/3 SEN bands and prices and compared to what was received in 2003/4. Before 2004/5 statement funding was mean and had to be subsidised out of School Action Plans monies. Now provision for non-statemented SEN pupils is being jeopardised
Special	Headteacher	Change form 10 bandings to 5 not circulated to special schools and we are therefore unable to comment

**Question: 31 Do you have any simpler proposals to ensure there is sufficient funding to enable infant classes to be kept at or below 30 pupils per class?**

Sector	Contact	Comment
Primary	Headteacher	Reception class funding should be based on activity-led funding & provide for a teacher & nursery nurse for every reception class.
Primary	Headteacher	If schools are split on their stances show some "tough love" and tell them what's the solution they have to go with!

**Question: 32 Have you any suggestions as to how the issues of split site arrangements, swimming pools and new school funding are best dealt with this year or should they remain as present and considered as part of the activity-led funding review?**

Sector	Contact	Comment
Primary	Bursar	Remain as present.
Primary	Chair of Governors	Part of activity-led funding review.
Primary	Governor	Surely rationalisation of school sites and facilities - the physical capital - is a better way forward than adhoc funding to support expensive capital stock.
Primary	Headteacher	Activity-led funding will help to ensure a better allocation system.
Primary	Headteacher	f schools are split on their stances show some 'tough love' and tell them what's the solution they have to go with.
Primary	Headteacher	See no reason to change.
Secondary	Headteacher	They should remain as present and be considered as part of the activity-led funding review.
Secondary	Headteacher	But schools with playing fields also have mayn't. Issues and schools without playgrounds, playing fields or swimming pools have financial costs re transport and hire of accommodation.

**Question: 32 Have you any suggestions as to how the issues of split site arrangements, swimming pools and new school funding are best dealt with this year or should they remain as present and considered as part of the activity-led funding review?**

Sector	Contact	Comment
Secondary	Headteacher	You need to take account of schools which have a playing field and classroom some distance away, necessitating a groundsman/caretaker and costly travel arrangements - coaches, but we get NO FUNDING AT ALL for this. I would suggest 50% of
Special	Headteacher	Remain as present
Special	Headteacher	Insufficient knowledge based on above information to make an informed decision.