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To: Forum Members: Nick Breach, Fiona Bridger-Wilkinson, Fadia Clarke, Jeanette Clifford, Kathryn Cockar, Paul Dick, Peter Fry, Reverend Mary Harwood, Jane Headland, Peter Hudson, Brian Jenkins, John Micklewhite (Vice-Chairman), Catherine Morley, Chris Prickett, David Ramsden, Clive Rothwell, Pam Slingsby, Graham Spellman, Maria Tillett, John Tyzack (Chairman), Keith Watts, Glyn Whiteford, Stacey Williams and Charlotte Wilson

Councillors: Councillor David Allen and Councillor Irene Neill

Officers: Carolyn Loosen, Ian Pearson and Claire White

SCHOOLS FORUM AGENDA

Monday, 15th July, 2013

5.00 pm Shaw House Church Road Newbury RG14 2DR

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Items for Information

None

Any Other Business

Date of next meeting 7 October 2013 5.00 pm at Shaw House

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Agenda Item 2

Minutes of a Meeting of the Schools Forum

Monday 10th June 2013

Shaw House

Present:	Bill Blythe	(substitute)	Finance Director	Newbury College
	Fiona Bridger-Wilkinson		Headteacher	Victoria Park Nursery School
	Jeanette Clifford		Governor	St Bartholomews School
	Kathryn Cockar		Headteacher	Kennet Valley Primary School
	Paul Dick		Headmaster	Kennet School
	Peter Fry		Headteacher	The Willink School
	Reverend Mary Harwood		Church of England Representative	Oxford Diocese
	Peter Hudson		Governor	Mortimer St Johns Infant School
	Brian Jenkins		Early Years PVI Representative	Jubilee Day Nursery
	John Micklewhite	(Vice Chair)	Headteacher	Birch Copse Primary School
	Chris Prickett		Headteacher	Streatley Primary School
	David Ramsden		Headteacher	Little Heath School
	Clive Rothwell		Governor	John O'Gaunt School
	Pam Slingsby		School Business Manager	Basildon Primary School
	Graham Spellman		Roman Catholic Representative	Portsmouth Diocese
	Maria Tillett		School Business Manager	Theale Green School
	John Tyzack	(Chair)	Governor	Falkland Primary School
	Glyn Whiteford		Headteacher	Denefield School
	Charlotte Wilson		Headteacher	Trinity School
	Councillor David Allen		Shadow Portfolio Holder for C&YP	
	Councillor Irene Neill		Executive Portfolio for C&YP	
	Shannon Coleman-Slaughter		Finance Manager Communities	
	Ian Pearson		Head of Education	
	Clare Warren		Schools' Finance Advisor	
	Claire White		Schools' Finance Manager	

Action

1. APOLOGIES RECEIVED

Nick Breach	Governor	Shaw cum Donnington Primary School
Fadia Clarke	Deputy Principal	Newbury College
Jane Headland	Headteacher	Brookfields Special School
Catherine Morley	Headteacher	Theale Primary School
Carolynn Loosen	Schools' Funding Officer	
Keith Watts	NUT Representative	
Stacey Williams	Headteacher	Reintegration Service

2. MINUTES OF PREVIOUS MEETING DATED 4TH MARCH 2013

The minutes of the meeting on 4th March were approved.

3. ACTIONS ARISING FROM PREVIOUS MEETINGS

There were no action points outstanding.

4. DECLARATIONS OF INTEREST

Reverend Mary Harwood declared an interest in agenda item 8 regarding the Scheme for Financing Schools, reporting on and control of the use of surplus balances.

5. MEMBERSHIP

Richard Blofeld, representing the Trade Unions has resigned from the Schools' Forum and has been replaced by Keith Watts.

The Forum welcomed Peter Hudson, the new primary governor representative.

6. SCHOOL FORUM MEMBERSHIP FROM SEPTEMBER 2013

Claire White presented three membership options to consider from September 2013, taking into account the approximate expected proportion of pupil numbers in maintained primary schools, maintained secondary schools and Academies. The options were based on a total membership of 24, 20 or 18. It was felt that the current membership of 24 worked well and was not too unwieldy, and it was rare for the full membership to be able to attend every meeting. 18 would be too small and may not generate as much debate on major issues. It was also noted that it was useful to have a SBM representative on the Forum, which may not be possible with a smaller membership number.

DECISION: The Schools' Forum agreed unanimously to the membership structure of Option 1 with a total membership of 24.

ACTIONS:

Primary Heads Forum to elect 3 representatives (including a SBM)

Secondary Heads Forum to elect 2 representatives

Governors to elect 3 representatives (2 primary and 1 secondary)

Academies to elect 1 governor representative

Nursery schools and special schools each to elect their own representative

Early Years Steering Group to elect 1 representative

I Pearson
I Pearson
I Pearson
Academy Reps
Nursery/Special
School Rep
EYSG

7. SCHOOLS FORUM CONSTITUTION

Claire White presented the proposed West Berkshire Schools' Forum constitution for 2013/14 which has been revised to incorporate changes in The Schools Forum Regulations 2012 which reflect the school funding reform changes. There were also amendments advised by the legal department.

DECISION: The constitution for 2013/14 was approved

ACTION: Website to be updated with revised constitution

C Loosen

8. SCHEME FOR FINANCING SCHOOLS 2013/14

Claire White presented the proposed West Berkshire Scheme for Financing Schools for 2013/14. The scheme had been sent to all Headteachers, Chairs of

Governors and School Business Managers for consultation and one response had been received (which had been approved by the Governors at that school), which objected to the inclusion of the clause “where schools in a federation operate a single budget, the sum/percentage threshold refers to a single budget and is not calculated for each individual school within the federation”. Their argument is that the federation operate a single budget for administrative ease but they are still two separate schools and should not be penalised for operating more efficiently. Much discussion followed, and Members felt that federated schools benefit from cost savings as they operate as one school. Members were also reminded that claw back is not automatic, and would be considered by the Forum after all circumstances are taken into account. A vote was taken with 1 eligible member voting to remove the clause, and 10 eligible members voting to leave this clause in.

DECISION: The Schools’ Forum agreed the scheme as presented and without the removal of the clause as put forward through the consultation with schools.

ACTION: Website to be updated with revised scheme

C Loosen

9. DSG OUTTURN 2013/14 AND USE OF UNDERSPEND

Shannon Coleman-Slaughter and Ian Pearson presented a report on DSG outturn for 2013/14. The total underspend was £2.2m, and £1.451m had already been allocated out to schools in March 2013, leaving a further balance of £0.756m. It was proposed that this should be held in the high needs budget due to the volatility of this area of spend and that spend in a number of new areas of responsibility including top up funding for PRUs and further education was still unknown.

A written question had been received from Stacey Williams (who was unable to attend the meeting) regarding Appendix A which showed that the Support Service Recharge for PRUs was £257k, and she had requested a breakdown of this charge. Shannon was compiling a response and would get back to her shortly.

DECISION: The Schools’ Forum agreed to the underspend being retained as a contingency in the High Needs Block

ACTIONS:

The £0.756m underspend to be added to the high needs contingency budget

S Coleman-Slaughter

A written response to be provided to Stacey Williams and copied to all SF members

S Coleman-Slaughter

10. SCHOOL BALANCES AS AT 31 MARCH 2013

Claire White presented a report on school balances as at 31 March 2013. Overall, balances have gone up by £325k from £3,991k to £4,316k, but this is largely due to John O’ Gaunt school having its deficit cleared at the end of 2012/13.

Generally school balances have stayed much the same with an average balance of 6% for primary and 3% for secondary.

One school closed with a deficit but has set a balanced budget for 2013/14. Two

schools had an excess surplus balance but these schools had contacted the Schools' Finance Manager early in the Spring Term and were deemed to be exceptional circumstances.

DECISION: The Schools' Forum agreed to the two schools with an excess surplus balance carrying forward their full surplus with no clawback. This is subject to the schools not retaining an excess surplus at the end of 2013/14.

11. ALLOCATION OF 6th FORM TEACHERS PAY GRANT FUNDING FROM EFA

2013/14 is the final year of the Teachers Pay Grant for 6th forms. Previously, schools received funding within their main formula allocation based on actual teachers receiving upper pay scale/leadership, and not based on the actual grant received. This funding has now been rolled into the AWPU. Therefore as a one off, this grant will be shared out to all schools with 6th forms. Ian Pearson presented the report and proposed that the allocation be based on actual 6th form pupil numbers as at January 2013 census.

DECISION: The Schools' Forum agreed to the allocation of the grant as proposed, but to also include PRUs (The Porch) in the distribution.

ACTION: Payments to be made to the relevant schools by the end of June

C Loosen

12. SCHOOL FORMULA 2014/15

Claire White presented a report setting out the main changes, actions required, and timetable of work following the publication by the DfE on 4th June of "School Funding Reform: Findings from the review of 2013-14 and Arrangements and Changes for 2014/15". It was noted that DfE deadlines gave very little time to review the formula options for 2014/15 in order to send a proposal out to schools before the end of the Summer Term. The main areas of remodelling to be carried out are in respect of the new sparsity factor for small rural schools, and a review of the lump sum. The impact of the new measures for prior attainment will also be reviewed. The level of deprivation being funded through the formula will also need review, and there was concern expressed regarding the accountability/impact of funding given to schools for deprivation and whether it was being used appropriately to close the attainment gap. It was asked why Forum Members had not been made aware of exceptional premises formula factors that can be applied to the DfE for permission to use (such as joint use of leisure centres), and it was explained that none of our schools are eligible as the cost would need to represent at least 1% of the total school budget and affect fewer than 5% of schools in the authority.

DECISION: The Schools' Forum agreed the actions required and timetable to complete them.

ACTION: Models will be considered at the next meeting of the Heads Funding Group on 4th July, with a proposal brought to the next meeting of the Schools' Forum.

C White

13. REVIEW OF SCHOOL FINANCIAL VALUE STANDARD 2012/13

Clare Warren introduced the report reviewing the School Financial Value Standard and responses received from schools. All schools had made a submission, and overall it was seen to have gone very well, with Governors using the standard as intended, as a self assessment tool to develop their statutory role of financial management. Most schools had identified actions. Where it was considered that a school had submitted a poor response, they had been contacted and given feedback and further advice.

ANY OTHER BUSINESS.

There was no other business

Meeting closed 6:30 p.m.

Date of next meeting: Monday 15th July 2013
Time: 5pm
Venue: Shaw House

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West Berkshire Schools' Forum	
Title of Report:	School Formula Proposal 2014/15
Date of Meeting:	15th July 2013
Contact Officer(s)	Claire White & Ian Pearson
For Decision	

1. Background

1.1 The formula changes introduced by the Department for Education (DfE) in 2013/14 were the first steps towards a national funding formula for schools. The Department has reviewed the impact of these changes and on 4th June announced further minor changes for 2014/15.

1.2 The spending review on 26th June announced the intention to have a national funding formula in place for 2015/16 and the consultation on this will commence shortly.

1.3 For 2014/15, the expectation is that local authorities will review their formula and tweak it where it is considered that funding is not reaching the schools and pupils that need it most. Formula changes will continue to be protected by a minimum funding guarantee of -1.5%. Due to the fact that further significant changes could be made in 2015/16, in order to give some stability to school budgets for next year, it is advisable that only changes that are seen as necessary are made.

1.4 It should be noted that there is no additional funding available – any change has to be met from within the current overall funding envelope.

1.5 The Heads Funding Group (HFG) met on 4th July, and this report details the changes and rationale for the proposed formula for 2014/15

2. Formula Review

2.1 The main concern raised by some West Berkshire schools was that the new formula does not deliver sufficient funding for very small schools. Many schools lobbied their MP's on this matter. The other concern is that West Berkshire schools overall are bottom in terms of attainment of pupils eligible for free school meals. These concerns need to be considered in addressing any changes to the existing formula.

2.2 Sparsity Factor

A sparsity factor has been introduced by the DfE for small rural schools. This funding is payable to schools where the average distance from where every pupil within the catchment area lives to their next nearest school is greater than 2 miles (or more) primary, 3 miles (or more) secondary “as the crow flies”. The distance can be increased, but not decreased. **Appendix A** models this factor using the data received from the DfE. Out of the 24 primary schools with less than 150 pupils, only 5 schools would qualify for the funding. The one secondary school with less than 600 pupils does qualify. The distances for the 5 primary schools are only just over 2 miles, yet the many schools just under 2 miles would receive no funding. It is therefore considered that this measure is not equitable or fair to our small schools, and it would not be right to redirect funding from all other schools to just these few schools. HFG also determined that the distance criteria should be increased to 3 miles which is the distance criteria for pupils over the age of 8 to qualify for free home to school transport. Under this measure, no primary school qualifies. HFG determined that the factor should be used for secondary schools, set at a lump sum of £100,000.

2.3 Lump Sum

From 2014/15 primary schools can have a different lump sum to secondary schools. HFG considered different lump sums (**Appendices B and C**) for both primary and secondary, looking at the effect of moving funding between the AWPU and lump sum, with a higher lump sum benefiting smaller schools at the cost of larger schools. HFG also looked at a small school model, and it is the schools with less than about 60 pupils which are most vulnerable under the current formula with a lump sum of £125,000. Rather than move funding away from larger schools it was considered that a more radical solution outside the funding formula would be required for the handful of schools with less than 60 pupils. Due to the probability of moving to a nationally determined formula including lump sum from 2015/16, it was determined that the lump sum should remain the same for 2014/15, particularly as at £125,000 it is close to the average lump sum (£131,000) set by all local authorities.

2.4 Deprivation

There has been no change to the measures, but the local authority and Schools' Forum is required to consider whether the funding being allocated through this factor is appropriate for the levels of deprivation within the local authority. Although the authority is in the bottom 5 of all local authorities in terms of levels of deprivation, those children's achievement is the lowest in the country. It was therefore determined that the amount of funding allocated should not be decreased, but consideration be given to the methodology and whether it is reaching the children who need it most. Various models were considered as follows (shown in **Appendix D**), each using more targeted funding through the IDACI indicator (10% of the IDACI funding going to band 1 (20 – 25% incidence), 30% of the IDACI funding going to band 2 (25 – 30% incidence), and 60% of the IDACI funding for bands 3 to 6 (above 30% incidence):

- Current model of 50% IDACI, 50% current FSM
- 50% IDACI, 50% Ever6 FSM
- 25% IDACI, 75% current FSM
- 25% IDACI, 75% Ever6 FSM
- 100% Ever6 FSM

The majority view of HFG was that as FSM Ever6 is the criteria used by the DfE in identifying the pupils and their outcomes, this should be used rather than the current FSM measure. It was also determined that more funding should be targeted through the FSM measure rather than IDACI, which is deemed as being unreliable in identifying the relevant pupils via their postcode, particularly for new housing developments. Therefore 25% IDACI, 75% FSM Ever6 is the recommended measure.

2.5 Prior Attainment

The DfE has changed the measure that has to be used for this factor. For primary, the EYFSP is to be retained, but for year 1 children the new profile will be used (children who have not achieved the expected level of development in all 12 prime areas of learning as well as maths and literacy). This data will be available in December 2013. For secondary the current measure is changing to children who fail to achieve a level 4 in English **or** Maths rather than English **and** Maths. This increases significantly the number of children counted in this measure. **Appendix E** illustrates this change based on 2012 data, and as the number of children qualifying for this funding more than doubles, the unit funding needs to be reduced accordingly in order to maintain the existing funding pot for the notional SEN budget. The appendix shows the effect that this has on secondary schools.

2.6 Exceptional Premises Factor

It had been raised whether the local authority should apply to the Secretary of State for an exceptional premises factor for joint use of leisure centres by contractual agreement. In order to apply, the school(s) in question need to demonstrate (by providing a copy of the contract containing the contract sum) that the additional cost incurred is greater than 1% of the school's total budget allocation and that such costs affect fewer than 5% of the schools in the authority. It is not thought that any school qualifies for this.

3. **Proposed 2014/15 Formula**

3.1 The Heads Funding Group is therefore recommending the following changes to the 2014/15 formula:

- Sparsity factor of £100,000, with a 3 mile qualifying distance for primary and secondary schools.
- Deprivation funding based on 25% IDACI and 75% Free School Meals Ever 6, with the IDACI element of funding targeted more to the higher bands: Primary £50 band 1, £150 band 2, £300 band 3 and above. Secondary £60 band 1, £180 band 2, £360 band 3 and above.
- Reduction in the rate for secondary prior attainment from £2,570 to £1,010 to reflect the increase in the numbers of pupils that the new measure covers.

3.2 **Appendix F** gives the actual formula detail, and **Appendix G** shows the effect of these changes on each individual school both before and after the Minimum Funding Guarantee (MFG) and capping of gains is applied. Note that for most schools the MFG/Capping reduction would have occurred anyway, and it is the column before MFG/Capping that shows the effect of the formula changes.

Recommendation: To send this proposal out to schools with a deadline of 20th September for them to return comments to be taken into account before the Schools' Forum determine their final proposal.

Appendices

Appendix A – Sparsity Factor Modelling

Appendix B – Lump Sum Primary Modelling

Appendix C – Lump Sum Secondary Modelling

Appendix D – Deprivation Models

Appendix E – Model Illustrating Changes due to Prior Attainment Data Change

Appendix F – Formula Recommendation

Appendix G – Recommended Formula Exemplification for Individual Schools

Small School Sparsity Modelling

Cost Centre	SCHOOL	DfE Data	Oct-12	DfE Suggested Funding		
		Avg distance to next school	TOTAL NOR	£100,000 Lump sum	£100,000 OR	£100,000 Tapered
95600	Chaddleworth St Andrews Primary	1.55	31	0		0
95600	Shefford Primary School	2.38	22	100,000		85,333
91700	Brimpton Church of England Primary School	1.58	37	0		0
91300	Beedon Church of England Controlled Primary School	1.98	39	0		0
94900	Purley Church of England Infants School	0.47	58	0		0
92800	Enborne Church of England Primary School	1.46	60	0		0
92700	The Ilsleys' Primary School	2.10	62	100,000		58,667
93800	Inkpen Primary School	1.80	64	0		0
97400	Yattendon Church of England Primary School	2.09	78	100,000		48,000
95100	Shaw-cum-Donnington Church of England Primary School	0.51	81	0		0
96700	Welford and Wickham Church of England Primary School	2.09	86	100,000		42,667
91400	Beenham Primary School	1.24	87	0		0
97300	Woolhampton Church of England Primary School	1.31	89	0		0
96400	Streatley Church of England Voluntary Controlled Primary School	1.08	94	0		0
91600	Brightwalton Church of England Aided Primary School	1.80	100	0		0
93500	Hampstead Norreys Church of England Primary School	1.82	104	0		0
92300	Curridge Primary School	1.25	106	0		0
92900	Englefield Church of England Primary School	1.14	107	0		0
96300	Stockcross Church of England Primary School	1.74	107	0		0
96500	Sulhamstead and Ufton Nervet Church of England Voluntary Aided	1.23	109	0		0
91800	Bucklebury Church of England Primary School	1.26	125	0		0
92200	Compton Church of England Primary School	1.82	130	0		0
91100	Basildon Church of England Primary School	2.19	134	100,000		10,667
93100	Fir Tree Primary School & Nursery	0.69	147	0		0
99000	John O Gaunt Secondary	6.75	378	100,000		63,000
TOTAL ADDITIONAL FUNDING				£600,000		£308,333

Options Given by DfE for use of this factor:

- Can INCREASE distance requirement but not reduce
- Can REDUCE pupil No's from 150 primary and 600 Secondary
- Can use LOWER sum than £100,000 but not greater
- Can use Lump Sum or Tapered, but same method to be used for all phases if applied
- Can use this factor for one phase only.
- Can apply to SoS for EXCEPTION for federated schools

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Lump Sum Modelling Sec'y		Current AWPU & LUMP SUM £125k	Model 1: Secondary lump sum £0k			Model 2: Secondary lump sum £50k			Model 3: Secondary lump sum £75k			Model 4: Secondary lump sum £115k			Model 5: Secondary lump sum £150k			Model 6: Secondary lump sum £175k		
SCHOOL	PUPIL NO's	Formula Budget	Formula Budget	Change in Funding £	Change in Funding %	Formula Budget	Change in Funding £	Change in Funding %	Formula Budget	Change in Funding £	Change in Funding %	Formula Budget	Change in Funding £	Change in Funding %	Formula Budget	Change in Funding £	Change in Funding %	Formula Budget	Change in Funding £	Change in Funding %
John O'Gaunt Community Technology College	378	1,763,229	1,687,720	-75,509	-4.3%	1,717,748	-45,481	-2.6%	1,732,761	-30,468	-1.7%	1,756,783	-6,446	-0.4%	1,777,803	14,574	0.8%	1,792,816	29,587	1.7%
Trinity School & Performing Arts College	694	3,132,141	3,098,618	-33,523	-1.1%	3,111,949	-20,192	-0.6%	3,118,615	-13,526	-0.4%	3,129,279	-2,862	-0.1%	3,138,611	6,470	0.2%	3,145,276	13,135	0.4%
The Willink School	836	3,747,285	3,732,630	-14,655	-0.4%	3,738,458	-8,827	-0.2%	3,741,372	-5,913	-0.2%	3,746,034	-1,251	0.0%	3,750,114	2,829	0.1%	3,753,028	5,743	0.2%
Park House School	837	3,751,617	3,737,095	-14,522	-0.4%	3,742,870	-8,747	-0.2%	3,745,757	-5,860	-0.2%	3,750,377	-1,240	0.0%	3,754,420	2,803	0.1%	3,757,307	5,690	0.2%
Denefield School	842	3,773,277	3,759,419	-13,858	-0.4%	3,764,930	-8,347	-0.2%	3,767,685	-5,592	-0.1%	3,772,094	-1,183	0.0%	3,775,952	2,675	0.1%	3,778,707	5,430	0.1%
The Downs School	896	4,007,205	4,000,522	-6,683	-0.2%	4,003,179	-4,026	-0.1%	4,004,508	-2,697	-0.1%	4,006,634	-571	0.0%	4,008,495	1,290	0.0%	4,009,824	2,619	0.1%
Theale Green Community School	1,034	4,605,021	4,616,674	11,653	0.3%	4,612,040	7,019	0.2%	4,609,723	4,702	0.1%	4,606,016	995	0.0%	4,602,772	-2,249	0.0%	4,600,455	-4,566	-0.1%
St. Bartholomew's School	1,250	5,540,733	5,581,085	40,352	0.7%	5,565,038	24,305	0.4%	5,557,015	16,282	0.3%	5,544,178	3,445	0.1%	5,532,945	-7,788	-0.1%	5,524,922	-15,811	-0.3%
Little Heath School	1,300	5,757,333	5,804,328	46,995	0.8%	5,785,640	28,307	0.5%	5,776,296	18,963	0.3%	5,761,345	4,012	0.1%	5,748,263	-9,070	-0.2%	5,738,918	-18,415	-0.3%
Kennet School	1,396	6,173,205	6,232,956	59,751	1.0%	6,209,195	35,990	0.6%	6,197,314	24,109	0.4%	6,178,306	5,101	0.1%	6,161,673	-11,532	-0.2%	6,149,792	-23,413	-0.4%
SECONDARY TOTAL	9,463	42,251,046	42,251,046	0		42,251,046	0		42,251,046	0		42,251,046	0		42,251,046	0		42,251,046	0	

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Cost Centre	DfE Ref	SCHOOL	2013/14 Prior Attainment			2014/15 Prior Attainment			Difference
			Secondary KS2		Primary:	Secondary KS2		Primary:	
			DfE %	No	£382	DfE %	No	£382	
					£2,570			£1,010	
								(reduce to same quantum)	
98900	5404	Denefield School	11.99%	100.96	259,459	29.43%	247.80	250,279	-9,180
98800	5406	The Downs School	7.10%	63.61	163,473	17.01%	152.41	153,934	-9,540
99000	4034	John O'Gaunt Community Technology College	11.27%	42.61	109,500	31.61%	119.49	120,681	11,181
99100	4042	Kennet School	11.55%	161.25	414,404	28.73%	401.07	405,082	-9,323
99200	4052	Little Heath School	6.45%	83.84	215,460	19.07%	247.91	250,389	34,929
99300	4038	Park House School	10.95%	91.65	235,542	29.49%	246.83	249,300	13,758
99800	5402	St. Bartholomew's School	5.67%	70.86	182,121	15.45%	193.13	195,056	12,935
99500	4054	Theale Green Community School	8.30%	85.81	220,529	22.43%	231.93	234,245	13,716
99900	4055	Trinity School & Performing Arts College	18.87%	130.99	336,636	42.44%	294.53	297,479	-39,157
99600	4031	The Willink School	8.53%	71.34	183,340	19.55%	163.44	165,072	-18,268
		PRIMARY TOTAL		0.00	768,631		0.00	768,631	0
		SECONDARY TOTAL		902.90	2,320,465		2,298.53	2,321,516	1,051
		TOTAL ALL SCHOOLS		902.90	3,089,096		2,298.53	3,090,147	1,051

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2014/15 School Formula Recommendation				
	2013/14 FINAL		2014/15 HFG Recommendation	
	RATE £	TOTAL FUNDING £	RATE £	TOTAL FUNDING £
PUPIL FUNDING				
Primary	2,844	34,941,384	2,844	34,941,384
Secondary	4,332	40,993,716	4,332	40,993,716
NOTIONAL SEN FUNDING				
Primary Prior Attainment	382	768,631	382	768,631
Primary FSM	700	766,199	700	766,199
Primary Pupil No's	63	774,018	63	774,018
Secondary Prior Attainment	2,570	2,320,465	1,010	2,321,539
DEPRIVATION				
Primary FSM / EVER6	460	503,502	450	755,100
Primary IDACI Band 1	150		50	
Primary IDACI Band 2	300		150	
Primary IDACI Band 3	400		300	
Primary IDACI Band 4	600		300	
Primary IDACI Band 5/6	600	502,683	300	288,838
Secondary FSM / EVER6	800	669,384	700	1,012,200
Secondary IDACI Band 1	200		60	
Secondary IDACI Band 2	400		180	
Secondary IDACI Band 3	600		360	
Secondary IDACI Band 4	800		360	
Secondary IDACI Band 5/6	1,000	670,597	360	342,776
EAL				
Primary	420	191,709	420	191,709
Secondary	420	27,890	420	27,890
RATES				
Primary		610,011		610,011
Secondary		400,145		400,145
LUMP SUM				
Primary	125,733	8,298,378	125,733	8,298,378
Secondary	125,733	1,257,330	125,733	1,257,330
SPARSITY				
Primary			100,000	
Secondary			100,000	100,000
MFG/CAP				
	cap 2.4%		cap 2.4%	
Primary	220,648		280,349	
Secondary	171,851	392,499	95,124	375,473
TOTAL ALLOCATION				
		94,088,541		94,225,337
PRIMARY	12,286	47,577,163	12,286	47,674,617
SECONDARY	9,463	46,511,378	9,463	46,550,720
Secondary:Primary Ratio		1.27		1.27
AVAILABLE FUNDING:				
GUF	4,359		4,359	
Pupil Numbers	21,736		21,736	
Total DSG		94,747,224		94,747,224
Add funding for NQT's		33,000		33,000
Less Centrally Retained		-671,000		-671,000
Total DSG Available		94,109,224		94,109,224
Balance		20,683		-116,113

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West Berkshire Schools' Forum	
Title of Report:	De-delegations / Buy Backs 2014-15
Date of Meeting:	15th July 2013
Contact Officer(s)	Shannon Coleman Slaughter / Ian Pearson
For Decision	

1. Introduction

1.1 A number of services which with approval from the School's Forum were centrally provided in financial year 13-14 through the pooling of delegations for maintained schools require review to determine if the pooled arrangements will continue for financial year 14-15. The Primary and Secondary school representatives on the Schools' Forum are required to make this decision for their own phase.

2. Services to be Delegated

2.1 **Appendix A** provides the detail of the likely amounts that will be delegated for each service. This will be an **additional delegation over and above the school formula**, and will not be subject to the Minimum Funding Guarantee (for maintained schools) but if the Schools' Forum decides to pool some of these services, funding from the maintained schools will be returned to the local authority (de-delegation) and they will continue to be centrally retained. Academies may be able to choose to buy into such services subject to service provider agreement.

2.2 Suggested methods of delegation are on a per pupil basis, apart from the service for support of schools in financial difficulty to be a fixed sum per school, and ethnic minority support to be based on the number of EAL pupils in their first, second or third year at school (data provided by the DfE).

2.3 For financial year 14-14 the Schools in Financial Difficulty is not offered as a pooled option, the funding will be delegated. Appendix A sets out the proposed delegation on the basis of a fixed sum.

3. Pooling of Services

3.1 The services where maintained schools have the option to pool back the funding to continue to be centrally provided on the basis of economies of scale or pooled risk are detailed below.

- a) Behavioural Support Appendix B
Includes support for class teachers for individual pupils or groups, and training.
- b) Ethnic Minority Support Appendix C
Includes assessment, advice, and support for pupils who speak English as an additional language and those from Gypsy, Roma, Traveller heritage.
- c) Trade Union local representation
This pays for release of staff as TU representatives, including provision of advice to individual members.
Primary: pool funding
Secondary: pool funding
- d) Contingency for schools in financial difficulty
The provision of financial support to schools over and above their formula funding.
Primary: in principle agree to pooling, but will need new rules around release of funding. Guidelines will be considered and agreed at a future meeting.
Secondary: not to be pooled

Action:

- 1. In respect of pooling Behavioural Support and Ethnic Minority delegations for financial year 14-15, school representatives to canvass colleagues and make a recommendation to the Schools Forum.**
- 2. In respect of Schools in Financial Difficulty Contingency and Trade Union costs, Heads Funding Group recommend that delegations are pooled on the basis set out in Appendix A.**

Behaviour Support Team: De-delegation 2014/15

It was previously agreed that schools would pool contributions in order to maintain a 'free at the point of delivery' service and training. This needs to be reviewed annually.

The evaluation of the BST's work is as follows:

1. Budget

14 – 15 Requirement	£207k
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2. The team

Primary: Penny Tripp 0.5fte
 Janet Norbury 0.5fte
 Angela Brand 0.5fte

Secondary: Dave Glare 0.5fte
 Manager: Darren Suffolk 0.4fte

3. Type of work delivered

Type of work (primary) delivered
Work with class teacher around an individual pupil
Work with teacher around a class or group
Whole school work
Attending network meetings
Training for whole school
Training for cluster of schools
Central training or conference
NQT training
Mid- day supervisor training
TA training
Work with parents
Training for governors
Risk assessments
Secondary work delivered
Work with individual students
Reintegration meetings
Work with parents
Support for Heads of Yr, pastoral staff

Primary support team	School visits approx	Schools receiving a visit	Training sessions delivered	Pupils referred approx	Class teacher contacts	Parent contacts
	367	61	106	195	288	183

4. Preventing exclusions

Primary permanent exclusions 0

Primary Fixed term exclusions terms 1-4 = 78, annual total likely to be slightly higher than last year.

Secondary exclusions 13 (reduced from 24 in 2010/11, 18 in 2011/12)

Secondary fixed term exclusions likely to be slightly higher than last year.

n.b. None of the pupils worked with by the Secondary Outreach Teacher have been permanently excluded subsequently.

5. Training

All training evaluated as good or excellent.

The following sessions were delivered:

- Attachment theory
- Low level disruption
- Positive behaviour strategies
- NQT modules
- SEN TA modules
- Positive parenting
- Draw and talk
- SDQ
- High End challenging behaviours
- Emotional development
- SEAL
- ADHD
- R time
- Behaviour 'tasters'
- Managing Feelings
- Making Lunchtimes Work
- Self Harm
- Peer mediation

6. National Policy Context and Legislation

- The **Ofsted Report on SEN** (2010) highlighted the wide variation in quality of provision for those with challenging behaviour, with some schools lacking the skills to identify, assess and make provision for these pupils. The *SEN draft legislation* picks up this theme.
- The BST plays an important role in improving standards and can focus support to schools where the behaviour of some children is challenging and to schools who have some inexperienced teachers or NQTs.
- Under the **1996 Education Act and SEN Code of Practice** the team helps to reduce the need for expensive out of area placements.
- The publication of the suite of DfE guidance documents on **Behaviour & Discipline (2011)** requires additional training and support for schools in meeting these new requirements.

- **'Statutory guidance on Exclusions' (2012), Preventing and Tackling Bullying (2011), Ensuring Good Behaviour in our schools (2012), Use of Reasonable Force (2011)** are all documents which may require additional support and training for schools.

Summary

The Behaviour Support Team offer experienced, evidence-based advice and support on a wide range of topics.

The number of requests for support and referrals are increasing.

A great deal of work this year has been supporting class teachers to develop effective behaviour strategies.

The vast majority of school Ofsted inspections report behaviour as good.'

Head teachers say they particularly appreciate the open referral system that allows quick and easy access.

Funding Implications

The 2014/15 anticipated delegations on a school by school basis using the EAL DFE data set are:

School Details	Delegation	Pupil Numbers Oct 12 Census
CUSTOMERS:		
Primary Schools		
Aldermaston CE Primary	2,373	169
Basildon CE Primary	1,882	134
Beedon CE (Controlled) Primary	548	39
Beenham Primary	1,222	87
Birch Copse Primary	5,786	412
Bradfield CE Primary	2,457	175
Brightwalton CE Primary	1,404	100
Brimpton CE Primary	520	37
Bucklebury CE Primary	1,755	125
Burghfield St Mary's CE Primary	2,415	172
Calcot Infant	2,921	208
Calcot Junior	3,033	216
Chaddleworth St Andrew's CE Primary	435	31
Chieveley Primary	2,514	179
Cold Ash St Mark's CE Primary	2,654	189
Compton CE Primary	1,826	130
Curridge Primary	1,489	106
Downsway Primary	2,935	209
Enborne CE Primary	843	60
Englefield CE Primary	1,503	107
Falkland Primary	5,996	427

Francis Baily Primary	7,330	522
Garland Junior	2,780	198
Hampstead Norreys CE Primary	1,460	104
Hermitage Primary	2,780	198
Hungerford Primary	5,645	402
Ilseleys' Primary	871	62
Inkpen Primary	899	64
John Rankin Infant	2,823	201
John Rankin Junior	3,160	225
Kennet Valley Primary	2,794	199
Kintbury St Mary's CE Primary	2,303	164
Lambourn CE Primary	2,373	169
Long Lane Primary	3,848	274
Mortimer St Johns CE Infant	2,556	182
Mortimer St Mary's CE Junior	3,230	230
Mrs. Bland's Infant	2,542	181
Pangbourne Primary	2,752	196
Parsons Down Infant	3,595	256
Parsons Down Junior	3,567	254
Purley CE Infants	814	58
Robert Sandilands Primary	2,977	212
Shaw-cum-Donnington CE Primary	1,137	81
Shefford CE Primary	309	22
Speenhamland Primary	3,735	266
Springfield Primary	4,016	286
Spurcroft Primary	4,887	348
St. Finian's Catholic Primary	2,668	190
St. John the Evangelist CE Infant	2,528	180
St. Joseph's Catholic Primary	2,766	197
St Nicholas CE Junior School	3,595	256
St. Paul's Catholic Primary	4,592	327
Stockcross CE Primary	1,503	107
Streatley CE Primary	1,320	94
Sulhamstead and Ufton Nervet CE Primary	1,531	109
Thatcham Park CE Primary	4,957	353
Theale CE Primary	3,061	218
Welford and Wickham CE Primary	1,208	86
Westwood Farm Infant	2,472	176
Westwood Farm Junior	3,160	225
Whitelands Park Primary	4,578	326
Willows Primary School	2,710	193
Winchcombe School	3,777	269
Woolhampton CE Primary	1,250	89
Yattendon CE Primary	1,095	78
Primary Total	170,464	12,139
Secondary Schools		
Downs. The	3,247	896
John O'Gaunt	1,370	378
Little Heath	4,710	1,300
Willink, The	3,029	836
Secondary Total	12,356	3,410

Academy Schools		
Denefield	3,051	842
Fir Tree Primary	2,064	147
Kennet	5,058	1,396
Park House	3,033	837
St. Bartholomew's	4,529	1,250
Theale Green Community	3,747	1,034
Trinity	2,515	694
Academy Total	23,997	6,200
All Schools Total	206,816	21,749
Cost	0	
Total Delegation	206,816	

Cathy Burnham

Principle Education Psychologist

Ethnic Minority and Traveller Achievement Service (EMTAS)

Context

Since April 2012, the EMTAS service has been funded through a de-delegation process as agreed with the Heads Funding Group. Historically the Ethnic Minority Achievement Service was provided to West Berkshire Schools through a consortium arrangement hosted through Reading Borough Council and the Gypsy, Roma and Traveller Service was through a consortium hosted through Wokingham District Council. The EMA service was brought in house several years ago and the GRT service became a West Berkshire Service in 2009. All of the support for Black Minority Ethnic pupils and Gypsy Roma Traveller pupils is provided by the EMTAS Service.

2014/15 Requirement	£218k
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Current Structure

The current service is led by a Team Manager (0.8FTE). They are supported by a Learning Support Adviser (a qualified teacher) for 0.6 FTE. There are 5 part time Pupil Support Officers (Teaching Assistant level posts) who are employed for a total of 2.5FTE. The service has administrative support for 1 day per week.

The Team Manager is responsible for the day to day management of the service. This includes:

- Organisation of English language assessments of new arrivals and advanced bilingual speakers;
- arranging advice and support for individual pupils including those with EaL and SEN and staff
- Arranging support for first language GCSE/AS/A2 papers;
- Arranging in- house school INSET linked to teaching and learning, equality and diversity and community cohesion;
- LA wide INSET around issues such as the Equality Act 2010.
- Organisation of tailored packages of support to schools meets the needs of ethnic minority pupils, pupils who speak English as an additional language and those from Gypsy, Roma, Traveller heritage.
- Advice and guidance papers to schools.

The Learning Support Adviser is responsible for providing support to schools. This includes:

- Carrying out the English language assessments for new arrivals. West Berkshire assessment requests have remained steady at approximately 100 per academic year.
- Providing assessment reports are with recommendations and guidance for classroom teachers
- Leading training for teachers and teaching assistants on EaL/BME issues.
- Support and guidance to schools with GRT pupils and managing the GRea121T project which trains teaching assistants to work on short term intensive programmes of learning to enable GRT pupils to narrow the gap in attainment with their peers.

The Pupil Support Officers all work in schools supporting individual and small groups of pupils.

- Support is provided for Polish, Bengali, Hindi and a small group of Unaccompanied Asylum Seeking young people.
- Support is focused on helping pupils to access the curriculum and can be pre-teaching of concepts; support for written work; translations; support for external examinations and translation work.
- Support schools with parent meetings and have also enabled Common Assessment Forms to be completed by family members in first languages.
- The Pupil Support Officer for GRT pupils has a wider brief involving intensive liaison between families and staff as well as supporting pupils in schools. Work is focused on attendance, achievement and attainment.

Number of EAL assessments completed in the last three years

In the academic year of 2010/11, 106 assessments were carried out in 47 schools and in 2011/12 this was 82 assessments in 53 primary schools, all of the secondary schools, both nurseries and both special schools. So far in this academic year 105 assessments have been carried out in 41 primary schools and 6 secondary schools. This number will continue to rise during the rest of the term to approximately 120. This means that the current academic year has seen the highest number of new arrivals since the service provision came into West Berkshire.

Number of BME children supported by Pupil Support Officers (PSOs)

PSO (Bengali/Hindi)

8 pupils in the following schools this year.

Lambourn	St Nicolas Juniors
Victoria Park Nursery	Speenhamland
St. John the Evangelist	

Schools have also received assistance with first language assessments, CAF completion, SEN issues and parental interviews in many other settings. Support has been placed in these schools for longer periods of time as a number of the children receiving this level of targeted support have also had SEN issues.

PSO (Polish/Spanish)

19 pupils in the following schools have received regular Polish bilingual PSO support in this academic year. (No. of pupils in brackets)

John Rankin Infant (2)	St. Joseph's (2)
Long Lane Primary (1)	The Winchcombe (1)
Parsons Down Infant (1)	Kennet (2)
Parsons Down Junior (1)	John O'Gaunt (1)
Purley Infants (2)	Little Heath (1)
Robert Sandilands (1)	The Downs (1)
St. John the Evangelist (1)	Trinity School (2)

EMTAS has provided support for 3 GCSE Polish examinations this year: 2 students at Kennet School and 1 pupil at John O'Gaunt. Trinity and The Downs have students who will be taking this qualification in 2014.

PSO (UASC)

4 students from Eritrea, SE Asia and Afghanistan who are all Looked After Children being educated in Park House, The Key and St. Bart's. Support is provided in lessons and in tutoring time. This PSO also attends Personal Education Planning meetings, liaising with SENCOs, Heads of Year, Connexions and LACES members.

Summary of PSO work

Total number of schools receiving (or have received) bilingual or UASC PSO support:
23

Number of TA funded hours given to schools hours

2010/11	2011/12	2012/13
1,170 hours	660 hours <i>This number is lower because we do not support to the secondaries that have become academies. 19 pupils were supported in transition from FS2 to Y1 with 380 hours of TA support</i>	735 hours <i>This figure is likely to rise further this term. It will also include further transition work from FS2 to Y1 which will be approximately 18 pupils with 360 hours of TA support</i>

Schools in receipt of GReaT 1 to 1 project funding during 2012/13 (hours included in the figures above)

Garland Junior	Sulhamstead and UN
Kennet Valley	Thatcham Park
Mrs Bland's Infant	Whitelands Park
Mortimer St Mary Junior	(work due to begin with The Willink shortly)

Number of training sessions (both general and school specific)

General courses

2010/11	2011/12	2012/13
Collaborative Learning	New Arrivals with EAL	New Arrivals with EAL
New Arrivals with EAL	NQT	NQT
GTP	Equality Act: Heads/SIAs	GTP
Equality Act: Secondary SIPs	GTP	EY Quality team and preschool counsellors
NQT	Global education: Olympic Games	

School INSET (approx. no. of staff in brackets)

2010/11	2011/12	2012/13
St. Joseph's (5) EAL	Long Lane (9) TAs	Curridge (all staff)
Winchcombe (16) Culturally Inclusive Curriculum	Lambourn (7) TAs MSJ: group (7) TAs	St Joseph's (all staff) The Willows (TAs)
Joint Mrs Bland's/ Garland Junior (40) GRT	Winchcombe Foundation stage (6) EAL SUN School (6) GRT	Chieveley (TAs)
Willows (18) Talk for Writing	The Downs School GRT Q & A (16)	
Kennet School (25) EAL	Brookfields EAL & Diversity (48)	
Willows (12) TAs	St. Joseph's Teachers (12) EAL	
St. John's (8) TAs	St. Joseph's TAs (10)	
St. Bart's (10) TAs		
St. Paul's (13) TAs		
Little Heath (30) EAL		
Willink (80) Race Equality		

Number of families supported by PSO (GRT)

Approximately 28 families 10/11 and 11/12 and work has continued this year with new families being ascribed to GRT status. As a result, the service has provided support for nearly 40 families. Transition support has been provided between schools and also when pupils have been transferring from out of West Berkshire into our schools. This work is in year changes as well as end of Key Stage transitions. Children from Circus families have been supported in accessing education whilst in the LA

Number of families supported in Early Years settings or Children's Centres: Approx. 14 +

Number of schools supported with GRT pupils

(64 GRT pupils have been supported at some point over the last year. Many of the pupils/schools are receiving ongoing support from EMTAS)

Aldermaston	Sulhamstead and UN
Calcot Infants	St Joseph's

Garland Junior	Thatcham Park
Hermitage	Whitelands Park
Hungerford	Brookfields
Kennet Valley	Lighthouse Project
Mortimer St Mary's Junior	Denefield
Mortimer St John's Infants	The Willink
Mrs Bland's Infants	Trinity

Total number of schools receiving (or have received) GRT, bilingual or UASC PSO support: 36 schools

Number of pupils who have attended the GRT site activities in the holidays

Adventure Dolphin Project 2012 – This was a cross generational project with approx 15 boys and girls from 7 years up to 15 yrs. Parents and grandparents attended which enabled the team to develop positive relationships with the community. The project included 3 days of activities including a day linked to the Health Activist work.

Plans are in place to develop the project further in Summer 2103 to include children from the housed Traveller community. These numbers will include resident West Berks children and families travelling; staying on the transit part of the site.

Number of pupils attending the Autumn 2012 Michaelmas Fair School

23 pupils over three days ranging from 4 to 14 years (including one child on the autistic spectrum and 2 profoundly deaf) attended the school and carried out a project on the local area alongside receiving support with their long distance learning packs. Feedback from parents and Northcroft Leisure Centre staff was 100% positive. This is booked to be repeated using the facilities at Northcroft this autumn.

Number of sessions run by the Learning Bus

11 sessions have been delivered from April 2012 to March 2013 on the Learning Bus that has been situated on the 2 GRT sites in West Berkshire. These sessions have enabled schools to make contact with hard to reach families through working alongside EMTAS. As a result of this work, more families have taken up early years provision and have developed better working relationships with local school staff. This is enabling parents to feel confident in approaching the schools and attending education drop in sessions etc.

Funding Implications

The 2014/15 anticipated delegations on a school by school basis using the EAL DFE data set are:

School Details	Delegation amount (£)	EAL Data Set (DfE)

CUSTOMERS:		
Primary Schools		
Aldermaston CE Primary	3,550	8.3
Basildon CE Primary	0	0.0
Beedon CE (Controlled) Primary	0	0.0
Beenham Primary	545	1.3
Birch Copse Primary	1,509	3.5
Bradfield CE Primary	0	0.0
Brightwalton CE Primary	0	0.0
Brimpton CE Primary	0	0.0
Bucklebury CE Primary	498	1.2
Burghfield St Mary's CE Primary	513	1.2
Calcot Infant	9,546	22.4
Calcot Junior	2,131	5.0
Chaddleworth St Andrew's CE Primary	0	0.0
Chieveley Primary	1,546	3.6
Cold Ash St Mark's CE Primary	494	1.2
Compton CE Primary	513	1.2
Curridge Primary	496	1.2
Downsway Primary	995	2.3
Enborne CE Primary	511	1.2
Englefield CE Primary	512	1.2
Falkland Primary	3,471	8.1
Francis Baily Primary	5,045	11.8
Garland Junior	1,705	4.0
Hampstead Norreys CE Primary	492	1.2
Hermitage Primary	499	1.2
Hungerford Primary	2,077	4.9
Ilseleys' Primary	0	0.0
Inkpen Primary	0	0.0
John Rankin Infant	8,123	19.1
John Rankin Junior	856	2.0
Kennet Valley Primary	8,980	21.1
Kintbury St Mary's CE Primary	522	1.2
Lambourn CE Primary	4,116	9.7
Long Lane Primary	4,307	10.1
Mortimer St Johns CE Infant	3,878	9.1
Mortimer St Mary's CE Junior	426	1.0
Mrs. Bland's Infant	2,593	6.1
Pangbourne Primary	500	1.2
Parsons Down Infant	9,429	22.1
Parsons Down Junior	2,983	7.0
Purley CE Infants	1,951	4.6
Robert Sandilands Primary	5,957	14.0
Shaw-cum-Donnington CE Primary	515	1.2
Shefford CE Primary	469	1.1
Speenhamland Primary	9,244	21.7
Springfield Primary	1,998	4.7
Spurcroft Primary	5,704	13.4
St. Finian's Catholic Primary	0	0.0
St. John the Evangelist CE Infant	7,032	16.5
St. Joseph's Catholic Primary	9,495	22.3
St Nicholas CE Junior School	1,705	4.0

St. Paul's Catholic Primary	22,360	52.5
Stockcross CE Primary	512	1.2
Streatley CE Primary	0	0.0
Sulhamstead and Ufton Nerve CE Primary	499	1.2
Thatcham Park CE Primary	2,567	6.0
Theale CE Primary	3,080	7.2
Welford and Wickham CE Primary	495	1.2
Westwood Farm Infant	4,526	10.6
Westwood Farm Junior	1,668	3.9
Whitelands Park Primary	4,071	9.6
Willows Primary School	8,546	20.1
Winchcombe School	12,978	30.5
Woolhampton CE Primary	0	0.0
Yattendon CE Primary	0	0.0
Primary Total	188,737	442.9
Secondary Schools		
Downs. The	700	2.0
John O'Gaunt	350	1.0
Little Heath	2,450	7.0
Willink, The	700	2.0
Secondary Total	4,199	12.0
Academy Schools		
Denefield	5,247	15.0
Fir Tree Primary	5,791	13.6
Kennet	1,369	3.9
Park House	3,857	11.0
St. Bartholomew's	3,504	10.0
Theale Green Community	345	1.0
Trinity	4,707	13.5
Academy Total	24,820	68.0
All Schools Total	217,757	522.9
Cost	0	
Surplus / (Deficit)	217,757	

Schools receive a high quality level of support in West Berkshire which has been highly valued by those that have used the service. The centrally funded service has allowed all schools to receive the level of support that they need which has not been directly linked to the number of pupils in schools.

If schools did not support a centrally delivered service to meet the needs of English as an additional language learners/Black Minority Ethnic pupils and those from the Gypsy Roma Traveller community they could expect to have to purchase support at the following rates:

An EaL assessment and report	£500-£600
Support for individual pupils by a Pupil Support Officer	£200 a day

Training on Equality and Diversity including Equality Act requirements; cultural awareness; bilingualism, meeting the needs of GRT pupils tailored to schools	
Requirements	£600-£800 a day
Tailored support provided by staff with relevant expertise	£400-£500 a day

Maxine Slade
Joint Principal Adviser for School Improvement
25.06.13

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New Delegations Per School

Item 4, Appendix A

Cost Centre	School	Delegations to Schools from April 2014							
		Data		Behaviour Support	Ethnic Minority Support	Financial Diff Support	Trade Union Representation	Contingency Financial diff	TOTAL
		Pupil No's	EAL Pupils	Pupil No's	EAL Pupils	Lump sum	Pupil no's	Pupil No's	
		Oct-12		£14.04	£426.18	£733.00	£2.06	£9.53	
		Method: Primary £: Sec'y £: Total £:	£3.62	£349.80	£733.00	£3.50	£30.66		
91000	Aldermaston Church of England Primary School	169	8	2,373	3,550	733	348	1,611	8,615
91100	Basildon Church of England Primary School	134	0	1,882	0	733	276	1,277	4,168
91300	Beedon Church of England Controlled Primary School	39	0	548	0	733	80	372	1,733
91400	Beenham Primary School	87	1	1,222	545	733	179	829	3,508
91200	Birch Copse Primary School	412	4	5,786	1,509	733	849	3,926	12,803
91500	Bradfield Church of England Primary School	175	0	2,457	0	733	361	1,668	5,219
91600	Brightwalton Church of England Aided Primary School	100	0	1,404	0	733	206	953	3,296
91700	Brimpton Church of England Primary School	37	0	520	0	733	76	353	1,681
91800	Bucklebury Church of England Primary School	125	1	1,755	498	733	258	1,191	4,435
91900	Burghfield St. Mary's Church of England Primary School	172	1	2,415	513	733	354	1,639	5,654
92000	Calcot Infant School & Nursery	208	22	2,921	9,546	733	428	1,982	15,611
92100	Calcot Junior School	216	5	3,033	2,131	733	445	2,058	8,401
95600	Chaddleworth St. Andrew's Church of England Primary School	31	0	435	0	733	64	295	1,528
92400	Chieveley Primary School	179	4	2,514	1,546	733	369	1,706	6,868
95900	Cold Ash St. Mark's Church of England Primary School	189	1	2,654	494	733	389	1,801	6,072
92200	Compton Church of England Primary School	130	1	1,826	513	733	268	1,239	4,578
92300	Curridge Primary School	106	1	1,489	496	733	218	1,010	3,946
92500	Downsway Primary School	209	2	2,935	995	733	431	1,992	7,085
92800	Enborne Church of England Primary School	60	1	843	511	733	124	572	2,782
92900	Englefield Church of England Primary School	107	1	1,503	512	733	220	1,020	3,988
93000	Falkland Primary School	427	8	5,996	3,471	733	880	4,069	15,149
93200	Francis Baily Primary School	522	12	7,330	5,045	733	1,075	4,975	19,158
93400	Garland Junior School	198	4	2,780	1,705	733	408	1,887	7,513
93500	Hamstead Norreys Church of England Primary School	104	1	1,460	492	733	214	991	3,891
93600	Hermitage Primary School	198	1	2,780	499	733	408	1,887	6,308
93700	Hungerford Primary School	402	5	5,645	2,077	733	828	3,831	13,114
92700	The Ilsleys' Primary School	62	0	871	0	733	128	591	2,322
93800	Inkpen Primary School	64	0	899	0	733	132	610	2,373
93900	John Rankin Infant & Nursery School	201	19	2,823	8,123	733	414	1,916	14,008
94000	John Rankin Junior School	225	2	3,160	856	733	464	2,144	7,357
94100	Kennet Valley Primary School	199	21	2,794	8,980	733	410	1,896	14,814
94200	Kintbury St. Mary's Church of England Primary School	164	1	2,303	522	733	338	1,563	5,458
94300	Lambourn Church of England Primary School	169	10	2,373	4,116	733	348	1,611	9,181
94400	Long Lane Primary School	274	10	3,848	4,307	733	564	2,611	12,064
95800	Mortimer St. Johns Church of England Infant School	182	9	2,556	3,878	733	375	1,734	9,276
97500	Mortimer St. Mary's Church of England Junior School	230	1	3,230	426	733	474	2,192	7,055
94500	Mrs. Bland's Infant & Nursery School	181	6	2,542	2,593	733	373	1,725	7,965
94600	Pangbourne Primary School	196	1	2,752	500	733	404	1,868	6,257
94700	Parsons Down Infant School	256	22	3,595	9,429	733	527	2,440	16,723
94800	Parsons Down Junior School	254	7	3,567	2,983	733	523	2,421	10,227
94900	Purley Church of England Infants School	58	5	814	1,951	733	119	553	4,171
95000	Robert Sandilands Primary School & Nursery	212	14	2,977	5,957	733	437	2,020	12,124
95100	Shaw-cum-Donnington Church of England Primary School	81	1	1,137	515	733	167	772	3,324
95200	Shefford Church of England Primary School	22	1	309	469	733	45	210	1,766
95300	Speenhamland Primary School	266	22	3,735	9,244	733	548	2,535	16,795
95400	Springfield Primary School	286	5	4,016	1,998	733	589	2,726	10,062
95500	Spurcroft Primary School	348	13	4,887	5,704	733	717	3,316	15,357
95700	St. Finian's Catholic Primary School	190	0	2,668	0	733	391	1,811	5,603
97700	St. John the Evangelist Infant & Nursery School	180	17	2,528	7,032	733	371	1,715	12,379
97800	St. Joseph's Catholic Primary School	197	22	2,766	9,495	733	406	1,877	15,278
96200	St. Nicolas Church of England Junior School	256	4	3,595	1,705	733	527	2,440	9,000
96100	St. Pauls Catholic Primary School	327	52	4,592	22,360	733	674	3,116	31,475
96300	Stockcross Church of England Primary School	107	1	1,503	512	733	220	1,020	3,988
96400	Streatley Church of England Voluntary Controlled Primary School	94	0	1,320	0	733	194	896	3,142
96500	Sulhamstead and Ufton Nerve Church of England Voluntary Controlled Primary School	109	1	1,531	499	733	225	1,039	4,026
99700	Thatcham Park Church of England Primary School	353	6	4,957	2,567	733	727	3,364	12,349
96600	Theale Church of England Primary School	218	7	3,061	3,080	733	449	2,078	9,401
96700	Welford and Wickham Church of England Primary School	86	1	1,208	495	733	177	820	3,433
96800	Westwood Farm Infant School	176	11	2,472	4,526	733	363	1,677	9,771
96900	Westwood Farm Junior School	225	4	3,160	1,668	733	464	2,144	8,168
97000	Whitelands Park Primary School	326	10	4,578	4,071	733	672	3,107	13,161
98700	The Willows Primary School	193	20	2,710	8,546	733	398	1,839	14,226
99400	The Winchcombe School	269	30	3,777	12,978	733	554	2,564	20,606
97300	Woolhampton Church of England Primary School	89	0	1,250	0	733	183	848	3,014
97400	Yattendon Church of England Primary School	78	0	1,095	0	733	161	743	2,732
98800	The Downs School	896	2	3,247	700	733	3,136	27,471	35,287
99000	John O'Gaunt Community Technology College	378	1	1,370	350	733	1,323	11,589	15,365
99200	Little Heath School	1,300	7	4,710	2,450	733	4,550	39,858	52,302
99600	The Willink School	836	2	3,029	700	733	2,926	25,632	33,020
98900	Denefield School	842	15	3,051	5,247	733	2,947	25,816	37,794
93100	Fir Tree Primary School & Nursery	147	14	2,064	5,791	733	303	1,401	10,292
99100	Kennet School	1,396	4	5,058	1,369	733	4,886	42,801	54,847
99300	Park House School	837	11	3,033	3,857	733	2,930	25,662	36,215
99800	St. Bartholomew's School	1,250	10	4,529	3,504	733	4,375	38,325	51,466
99500	Theale Green Community School	1,034	1	3,747	345	733	3,619	31,702	40,146
99900	Trinity School & Performing Arts College	694	13	2,515	4,707	733	2,429	21,278	31,662
PRIMARY TOTAL		12,139	443	170,464	188,737	47,645	25,006	115,685	547,537
SECONDARY TOTAL		3,410	12	12,356	4,199	2,932	11,935	104,551	135,973
ACADEMY TOTAL		6,200	68	23,997	24,820	5,131	21,488	186,986	262,422
TOTAL ALL SCHOOLS		21,749	523	206,816	217,757	55,708	58,430	407,221	945,932

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West Berkshire Schools' Forum	
Title of Report:	School Budgets 2013-14
Date of Meeting:	15th July 2013
Contact Officer(s)	Clare Warren
For Information	

1. Summary

1.1 The attached Appendix A shows the budgets submitted by schools for 2013-14.

1.2 Of the 74 budgets submitted:

	No of schools	% of total
Surplus budget	61	82%
Balanced budget	10	14%
Deficit budget	3	4%

1.3 The schools with deficit budgets are:

	Opening balance	Closing deficit budget
John O'Gaunt	£124,392	-£182,497
The Willows	£84,120	-£43,240
Parsons Down Junior	£51,200	-£16,484

2. John O'Gaunt School

2.1 The submitted a deficit budget of £182,497 is much larger than anticipated from the reviewed draft budgets as the school has included a £55k upgrade of the 10-year-old wireless infrastructure, as well as the planned redundancies.

2.2 The 2012/13 carried forward surplus includes an additional allocation of £187k and an amount of £85k included for redundancies as agreed by the Schools' Forum in March 2013.

2.3 Pupil number assumptions continue to be modest with 2013/14 funding based on 378 rising to 441 in 2017/18.

2.4 The Head of Finance and Corporate Director for Communities are meeting the school to discuss this budget further as there is no deficit recovery position.

3. The Willows Primary School

3.1 The 2012/13 carried forward surplus includes additional funding of £59k as agreed by the Schools' Forum in March 2013.

3.2 The school will gain additional funding from the in-year growth of pupil numbers but it is difficult to predict the exact impact due to the nature of the school catchment area. A conservative estimate has been included in the budget but this could be higher.

3.3 The current 5-year budget shows that the school will recover this deficit position by 2016-17.

4. Parsons Down Junior School

4.1 The school has been impacted by the capping of the increase in funding under the funding formula reforms but they have included in their budget an amount from in-year growth of pupil numbers. The school also need to undergo a 3-year programme of ICT refurbishment so have budgeted a deficit recovery by 2016/17.

4.2 With regards to pupil numbers the school have been funded for 254 pupils with only 36 in the current year 6 but this will rise to 298 for 2014/15 and 342 by 2017/18.

Appendices

Appendix A - School budgets 2013-14

School Budgets - Outturn 2012/13 and Budget Plan 2013/14 (plus 2 years where submitted)

Item 8 - Appendix A

School Budget Summary (excluding Capital and Community Focussed)	Current year (Oct 2012)		Capacity (per CC paper)	% Full	2012/13 Outturn	2013/14	2014/15	2015/16	13/14 budget as % of funding
NURSERY SCHOOLS									
Hungerford Nursery School & Centre for Children & Families					22,465	0	0	0	
Victoria Park Nursery School & Children's Centre					42,679	180	-34,529	-74,359	
TOTAL NURSERY SCHOOLS					65,144	180	-34,529	-74,359	
<i>As a % of the 2012/13 outturn position</i>						0.3%			
PRIMARY SCHOOLS									
Aldermaston Church of England Primary School	169	168	101%		39,370	17,180	-25,501	-71,212	2.6%
Basildon Church of England Primary School	134	133	101%		38,802	14,580	18,780	15,600	2.7%
Beedon Church of England Controlled Primary School	39	52	75%		23,054	7,190	-28,240	-67,090	2.7%
Beenham Primary School	87	105	83%		2,217	0	32,750	63,600	0.0%
Birch Copse Primary School	412	392	105%		50,035	38,370	17,980	970	2.7%
Bradfield Church of England Primary School	175	175	100%		28,460	6,670	10,150	10,150	1.0%
Brightwalton Church of England Aided Primary School	100	105	95%		29,269	13,730	27,460	32,360	3.2%
Brimpton Church of England Primary School	37	51	73%		26,668	2,990	-23,900	-81,690	1.1%
Bucklebury Church of England Primary School	125	126	99%		7,126	100	9,780	270	0.0%
Burghfield St. Mary's Church of England Primary School	172	210	82%		15,006	1,140	14,720	56,321	0.2%
The Calcots	424	456	93%		96,489	45,470	76,200	223,460	2.9%
Chieveley Primary School	179	210	85%		20,204	0	-35,720	-58,321	0.0%
Cold Ash St. Mark's Church of England Primary School	189	196	96%		57,112	7,820	-10,240	-30,170	1.1%
Compton Church of England Primary School	130	180	72%		27,908	39,080	34,032	15,406	7.1%
Curridge Primary School	106	105	101%		19,694	4,480			1.0%
Downsway Primary School	209	210	100%		58,627	15,170	-45,370	-132,200	1.9%
Enborne Church of England Primary School	60	70	86%		26,443	5,490	9,419	5,591	1.8%
Englefield Church of England Primary School	107	105	102%		29,678	15,510	7,970	-11,480	3.4%
Falkland Primary School	427	420	102%		121,029	152,880	119,090	6,880	10.3%
Francis Baily Primary School	522	525	99%		101,184	75,060	47,500	-135,260	3.9%
Garland Junior School	198	240	83%		66,385	58,370	47,890	33,555	7.7%
Hampstead Norreys Church of England Primary School	104	84	124%		25,209	14,380	2,190	-27,610	3.1%
Hermitage Primary School	198	189	105%		33,708	17,880	8,590	-25,240	2.4%
Hungerford Primary School	402	392	103%		95,942	45,710	16,310	-20,090	3.2%
The Ilsleys' Primary School	62	84	74%		22,541	7,590	-14,446	-40,970	2.3%
Inkpen Primary School	64	98	65%		17,777	7,140	17,370	14,600	2.1%
John Rankin Infant & Nursery School	201	180	112%		57,262	0			0.0%
John Rankin Junior School	225	240	94%		30,041	0			0.0%
Kennet Valley Primary School	199	210	95%		58,193	20,070	16,370	11,380	2.6%
Kintbury St. Mary's Church of England Primary School	164	210	78%		54,113	31,170	12,380	-71,800	4.5%
Lambourn Church of England Primary School	169	196	86%		60,117	25,730			3.7%
Long Lane Primary School	274	284	96%		100,301	23,960	-28,760	-126,770	2.5%
Mortimer St. Johns Church of England Infant School	182	180	101%		44,831	9,130	4,191	-38,981	1.3%
Mortimer St. Mary's Church of England Junior School	230	240	96%		67,757	14,550			1.8%
Mrs. Bland's Infant & Nursery School	181	177	102%		42,085	11,950	7,388	5,705	1.7%
Pangbourne Primary School	196	196	100%		33,220	24,030	34,880	27,850	3.2%
Parsons Down Infant School	256	240	107%		57,597	10,090	8,422	6,579	1.1%
Parsons Down Junior School	254	320	79%		51,199	-16,490	-13,479	-6,569	-1.8%
Purley Church of England Infants School	58	51	114%		27,441	5,530	-14,500	-40,790	1.8%
Robert Sandilands Primary School & Nursery	212	210	101%		73,877	30,140	33,090	29,370	3.6%
Shaw-cum-Donnington Church of England Primary School	81	77	105%		16,810	13,330	21,840	3,310	3.0%
Chaddleworth & Shefford Federated School	53	146	36%		27,851	9,200			2.1%

School Budgets - Outturn 2012/13 and Budget Plan 2013/14 (plus 2 years where submitted)

Item 8 - Appendix A

School Budget Summary (excluding Capital and Community Focussed)	Current year (Oct 2012)	Capacity (per CC paper)	% Full	2012/13 Outturn	2013/14	2014/15	2015/16	13/14 budget as % of funding
Speenhamland Primary School	266	315	84%	70,340	13,890	17,950	3,870	1.4%
Springfield Primary School	286	280	102%	85,357	16,680	23,780	32,947	1.6%
Spurcroft Primary School	348	315	110%	74,508	24,450	25,768	28,847	2.0%
St. Finian's Catholic Primary School	190	196	97%	33,835	2,320	315	4,218	0.3%
St. John the Evangelist Infant & Nursery School	180	165	109%	8,398	70	26,640	44,010	0.0%
St. Joseph's Catholic Primary School	197	210	94%	53,655	1,170	4,505	20,900	0.2%
St. Nicolas Church of England Junior School	256	256	100%	52,724	30,950			3.4%
St. Pauls Catholic Primary School	327	315	104%	43,390	64,430	127,530	178,037	5.7%
Stockcross Church of England Primary School	107	105	102%	9,098	3,900	-7,470	-30,860	0.9%
Streatley Church of England Voluntary Controlled Primary	94	112	84%	32,932	13,910	6	3,130	3.4%
Sulhamstead and Ufton Nerve Church of England Volunte	109	105	104%	34,288	7,510	11,190	14,546	1.7%
Thatcham Park Church of England Primary School	353	420	84%	127,483	46,170	34,930	-3,050	3.6%
Theale Church of England Primary School	218	225	97%	68,742	700	-48,790	-81,540	0.1%
Welford and Wickham Church of England Primary School	86	84	102%	29,809	5,150	-25,525	-87,177	1.3%
Westwood Farm Infant School	176	180	98%	48,329	3,690	-7,080	-27,410	0.5%
Westwood Farm Junior School	225	240	94%	103,541	20,000	-37,830	-126,381	2.4%
Whitelands Park Primary School	326	378	86%	107,746	69,700	36,134	10,267	5.9%
The Willows Primary School	193	380	51%	84,119	-43,240	-71,180	-62,730	-5.5%
The Winchcombe School	269	315	85%	39,686	10,540	-7,110	-49,530	0.9%
Woolhampton Church of England Primary School	89	105	85%	27,721	0	0	0	0.0%
Yattendon Church of England Primary School	78	70	111%	22,664	13,900	17,507	-7,721	3.6%
TOTAL PRIMARY SCHOOLS	12,139	13,009	93%	3,040,997	1,132,260	537,856	-558,912	
<i>As a % of the 2012/13 outturn position</i>					37.2%			
SECONDARY SCHOOLS								
The Downs School	896	1141	79%	324,209	100,710	112,607	105,145	2.3%
John O'Gaunt Community Technology College	378	680	56%	166,255	-182,500			-8.2%
Little Heath School	1,300	1661	78%	113,755	49,030			0.8%
Theale Green Community School	1,034	1389	74%	236,099	18,590	-163,620	-575,080	0.4%
The Willink School	836	1044	80%	199,355	25,650	-265,209	-659,408	0.6%
TOTAL SECONDARY SCHOOLS	4,444	5,915	75%	1,039,673	11,480	-316,222	-1,129,343	
<i>As a % of the 2012/13 outturn position</i>					1.1%			
SPECIAL SCHOOLS								
Brookfields Special School				213,794	43,760	48,610	49,590	
The Castle School				-43,730	52,200	106,300	115,400	
TOTAL SPECIAL SCHOOLS				170,064	95,960	154,910	164,990	
<i>As a % of the 2012/13 outturn position</i>					56.4%			
OTHER								
Alternative Curriculum				0	10,100			
Reintegration Service				0	1,690			
TOTAL OTHER				0	11,790			
TOTAL FOR ALL SCHOOLS				4,315,878	1,251,670	342,015	-1,597,624	

29.0%