

Public Document Pack

To: Forum Members: Fiona Bridger-Wilkinson, Patricia Brims, Sarah Brinkley, Nathan Butler- Broad, Fadia Clarke, Jeanette Clifford, Paul Dick, Reverend Mary Harwood, Jon Hewitt, Kate House, Peter Hudson, Brian Jenkins, Catherine Morley, Chris Prickett, David Ramsden, Clive Rothwell, Graham Spellman, John Tyzack, 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, 7th October, 2013

5.00 pm in the Shaw House Church Road Newbury RG14 2DR

Item and Presenting Officer	Page No.
1 Apologies	
2 Minutes of previous meeting dated 15 July 2013	1 - 6
3 Actions arising from previous meetings	
4 Declarations of Interest	
5 Appointment of Chair and Vice Chair	

Items for Decision

6 School Formula Proposal 2014/15 Ian Pearson / Claire White	7 - 28
7 De-Delegations / Buy Backs 2014/15 Ian Pearson / Shannon Coleman-Slaughter	29 - 32
8 Retained Funding Proposals Ian Pearson / Claire White	33 - 42
9 Additional SEN Funding Proposal Ian Pearson / Claire White	43 - 46
10 Funding of High Needs Students in FE Colleges Jane Seymour	47 - 50

Items for Discussion

11 DSG Budget Monitoring Month 5 Ian Pearson / Shannon Coleman-Slaughter	51 - 56
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Items for Information

12 **Benchmarking Data 2013/14**
Carolynn Loosen

57 - 66

Any Other Business

Agenda Item 2

Minutes of a Meeting of the Schools Forum

Monday 15th July 2013

Shaw House

Present:	Fiona Bridger-Wilkinson	Headteacher	Victoria Park Nursery School
	Paul Dick	Headmaster	Kennet School
	Reverend Mary Harwood	Church of England Representative	Oxford Diocese
	Jane Headland	Headteacher	Brookfields Special School
	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
	David Ramsden	Headteacher	Little Heath School
	Clive Rothwell	Governor	John O'Gaunt School
	Pam Slingsby	School Business Manager	Basildon Primary School
	Maria Tillett	School Business Manager	Theale Green School
	John Tyzack (Chair)	Governor	Falkland Primary School
	Stacey Williams	Headteacher	Reintegration Service
	Councillor David Allen	Shadow Portfolio Holder for C&YP	
	Shannon Coleman-Slaughter	Finance Manager Communities	
	Melanie Ellis	Chief Accountant	
	Carolynn Loosen	Schools' Funding Officer	
	Ian Pearson	Head of Education	
	Clare Warren	Schools' Finance Advisor	
	Claire White	Schools' Finance Manager	

Action

1. APOLOGIES RECEIVED

Peter Fry	Headteacher	The Willink School
Councillor Irene Neill	Executive Portfolio for C&YP	
Graham Spellman	Roman Catholic Representative	Portsmouth Diocese
Glyn Whiteford	Headteacher	Denefield School
Charlotte Wilson	Headteacher	Trinity School

ABSENT

Nick Breach	Governor	Shaw cum Donnington Primary School
Fadia Clarke	Deputy Principal	Newbury College
Jeanette Clifford	Governor	St Bartholomews School
Kathryn Cockar	Headteacher	Kennet Valley Primary School
Catherine Morley	Headteacher	Theale Primary School
Chris Prickett	Headteacher	Streatley Primary School
Keith Watts	Union Representative	

2. MINUTES OF PREVIOUS MEETING DATED 10TH JUNE 2013

Correction made to item 9 which should have read "DSG Outturn 2012/13" not 2013/14.

The minutes of the meeting on 10th June were approved.

3. ACTIONS ARISING FROM PREVIOUS MEETINGS

Shannon Coleman-Slaughter has written a response to Stacey Williams regarding Support Services Recharge for PRU's but this has not been circulated to the other members of the Schools' Forum.

Action: Response to be circulated to the Schools' Forum members and to be discussed at the next schools' Forum meeting.

S Coleman-Slaughter

4. DECLARATIONS OF INTEREST

None

5. MEMBERSHIP

Carolynn Loosen provided an update on the membership changes in preparation for the Autumn Term.

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

Waiting for confirmation of new members from the Primary Heads Forum. Melissa Fry the headteacher at Pangbourne School is co-ordinating the election.

Secondary Heads Forum to elect 2 representatives

Waiting for confirmation of new members from the Secondary Heads Forum. Val Houldey the headteacher at The Downs is co-ordinating the election.

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

The primary and secondary governor representative elections are in progress and the nominations are due to close on Friday 19th July.

Academies to elect 1 governor representative

Waiting for confirmation from the academies.

Nursery Schools representative

Fiona Bridger-Wilkinson will continue to represent the nursery schools on the Schools' Forum from September. Suzanne Taylor will be the substitute should Fiona not be able to attend.

Special Schools representative

Jon Hewitt of The Castle School will represent the Special Schools on the Schools' Forum from September. Jane Headland will be the substitute should Jon not be able to attend.

Early Years PVI representative

Waiting for confirmation from the Early Years Steering Group.

Action: Follow up with Early Years Steering Group.

B Jenkins

Thanks were expressed to the following Schools' Forum members for the work they have done for the Forum and who will not be restanding in the next academic year:

Nick Breach

Kathy Cockar

Maria Tillett

John Micklewhite

6. SCHOOL FORMULA PROPOSAL 2014/15

Claire White presented the analysis and recommendations from the Heads Funding Group on the various options for the school funding formula for 2014/15.

Sparsity Factor

The Sparsity factor is not targeting small schools just distance from the next school. Only a few schools would qualify for the funding (by just being over the 2 mile criteria) which would be at the expense of all other schools including the other small schools. It was agreed that this is not fair or equitable to the small primary schools.

DECISION: Propose that the sparsity factor is to be used in 2014/15 for both primary and secondary schools but based on a criterion of 3 miles and a lump sum of £100k. Just the smallest secondary school qualifies for funding.

Lump Sum Options

The other option for protecting small schools is through the lump sum, but the same lump sum has to be applied to each phase and cannot be varied by school size. Different lump sums were modelled but rather than moving funding away from larger school it was considered that a more radical solution outside the funding formula would be required for the few schools with less than 60 pupils that are most vulnerable with the current lump sum of £125k. Small schools working group is to be set up.

DECISION: Propose that the lump sum should remain unchanged at £125k in 2014/15.

Deprivation Models

Comprehensive modelling has been completed using various combinations of IDACI, FSM and Ever6 FSM to establish the most effective combination for targeting funding. It was agreed that the funding should not be reduced.

DECISION: Propose that the method used to allocate deprivation funding in 2014/15 be 25% IDACI 75% Ever6 FSM. Ever6 will also apply to 1/3 of the primary notional SEN budget.

Change to Prior Attainment Data

As the change to the KS2 data being used for secondary school prior attainment from English and Maths to English or Maths more than doubles the numbers of pupils included the unit funding, this will need to be decreased accordingly in order to maintain existing funding for the notional SEN budget.

Exceptional Premises Factor

It is not thought that any school qualifies for the exceptional premises factor.

DECISION: The Schools' Forum agreed the recommendations from the Heads Funding Group. A Funding Formula 2014/15 consultation document is to be sent to schools this week. The deadline for reply will be 20th September so that comments can be taken into account before the Schools' Forum determines their final proposal.

C White

7. DE-DELEGATIONS / BUY BACKS 2014/15

Ian Pearson presented a report on the proposed arrangements for 2014-15.

For 2014-15 funding for the support element for schools in financial difficulty continues to be delegated to schools but there is no option to pool; the service will be included as part of the Schools Accountancy buy-back.

The Primary and Secondary school representatives on the Schools' Forum are required to make the pooling decision for their own school phase, and their current proposals (subject to further consultation with the groups that they represent) are as follows:

Behavioural Support

Includes support for class teachers for individual pupils or groups, and training.

Primary: pool funding

Secondary: pool funding

Ethnic Minority Support

Includes assessment, advice, and support for pupils who speak English as an additional language and those from Gypsy, Roma and Traveller heritage.

Primary: pool funding

Secondary: pool funding

Trade Union local representation

This pays for release of staff as TU representatives, including provision of advice to individual members. Discussion took place on whether the unions should pay for this, or whether schools should just rely on regional or national representatives.

Primary: pool funding

Secondary: pool funding

Contingency for schools in financial difficulty

The provision of financial support to schools over and above their formula funding.

Primary: pool funding

Secondary: not to be pooled

Action: Details of the Behaviour Support and Ethnic Minority Support Service to be put on the website and not included with the consultation documentation.

C Loosen

8. INDIVIDUAL SCHOOL BUDGETS 2013/14

Clare Warren reported on the individual school budgets submitted. 71 schools have submitted surplus or balanced budgets and 3 schools have submitted a deficit budget.

JOG has submitted a deficit budget of £182k. The Head of Finance and Corporate Director for Communities have now met the school and a number of actions have been identified.

The Willows has submitted a deficit budget of £43k after taking account of the additional funding allocated by the Schools' Forum in March 2013. It has been difficult to budget with the ongoing uncertainty of pupil numbers but the LA continues to monitor and support the school. The school is currently budgeting to recover their deficit position by 2016-17.

Parsons Down Junior has submitted a deficit budget of £14k. They currently have a small year 6 so will experience an in-year growth of pupil numbers. The school is currently budgeting to recover their deficit position by 2017-18

Not all schools have submitted 3 year budgets at this stage as the deadline for year 2 and 3 budgets is 31st July.

All schools will be carefully monitored by the Schools Finance Team to ensure that their final outturn does not result in excess surplus balances.

ANY OTHER BUSINESS.

There was no other business

Meeting closed 6:15 p.m.

Date of next meeting: Monday 7th October 2013
Time: 5pm
Venue: Shaw House

West Berkshire Schools' Forum	
Title of Report:	School Formula 2014/15
Date of Meeting:	7th October 2013
Contact Officer(s)	Claire White & Ian Pearson
For Decision	

1. Introduction

- 1.1 At the last meeting of the Schools' Forum, minor amendments to the current formula were agreed, and this formed the basis of a consultation with all primary and secondary schools (maintained and academy).
- 1.2 The consultation was sent to all schools on 17th July 2013, with a closing date of 20th September 2013. Appendix A contains this document.
- 1.3 In the light of responses received, the Schools' Forum is required to finalise its recommended formula to the Council's Executive on 17th October for final approval, and will then be submitted to the Education Funding Agency before the deadline of 31st October 2013.

2. Consultation Responses

- 2.1 There were a total of 5 responses to the consultation – 3 from primary schools, 2 from secondary schools (both Academies).
- 2.2 Two respondents did not agree with part of the proposals, the reasons stated below:
- 1) The small school sparsity factor is not being used by West Berkshire in the way that the DfE intended and is unfair to those schools it was designed to help, running the risk of small rural schools becoming financially unviable and unsustainable. Note that the other Primary respondents were both from very small schools who do not qualify for sparsity funding and were commenting how disappointed they were that the sparsity factor does not help all small schools.
 - 2) The change to the deprivation measure (using 75% Ever 6 Free School Meals and 25% IDACI) does not target the schools with the most deprived pupils, and using Ever 6 means that schools are being funded twice using this method (also used for calculating the pupil premium). Note that the other Secondary respondent agreed with the revised measure being proposed and felt it was a better targeted and directed measure of deprivation.

2.3 The Heads Funding Group (HFG) considered and debated these responses, and determined that no changes should be made to the original proposal.

2.4 An option to change the sparsity factor was considered. This was to amend the sparsity formula for primary schools back to the DfE recommended 2 miles, but that the funding for primary schools only be tapered and based on £50,000 for schools with 100 pupils or less (see Appendix B). Four schools would receive additional funding using this method. However, HFG felt that the original decision was still valid in that it would not be equitable and fair to direct funding away from all other schools (including the other small schools) to support just these few schools, particularly where a school just over the 2 miles qualifies for funding whereas a school just under 2 miles receives no additional funding. Hence the original proposal to move the qualifying mileage to 3 miles to reflect a more realistic distance measure of sparsity. It should be noted that a further representation has been made to the Schools' Minister that in considering the future funding formula for schools there should be a small school protection factor that can be applied fairly to all small schools.

2.5 The arguments for changing the basis of deprivation funding to 75% based on pupils eligible for free school meals in the past 6 years and 25% based on IDACI were revisited. Only one school had disputed this change in method. HFG determined that using the Ever6 rather than current free school meal method captured children who may drift in and out of eligibility, and it is the method used and thus favoured by the Government. Due to doubts on the reliability of IDACI, its use should be reduced from 50% to 25% though should not be removed altogether. It was therefore agreed to keep to the original proposal.

3. The Proposed Formula

3.1 If accepting the recommendation from HFG, the proposed formula for 2014/15 is as follows:

3.1.1 Basic Entitlement (no change): £2,907 per primary pupil, £4,332 per secondary pupil

3.1.2 Deprivation (change to measure and %): 75% of total deprivation funding based on number of pupils ever eligible for Free School Meals in the last 6 years, 25% of total deprivation funding based on the Income Deprivation Affecting Children Index.

3.1.3 Prior Attainment as a proxy for pupils with low level special educational needs (DfE change to secondary measure): Primary based on number of pupils not achieving a score of 78 in the Early Years Foundation Stage Profile; Secondary based on number of pupils not achieving a level 4 in English or Maths.

3.1.4 English as an Additional Language (no change): number of pupils in the statutory school system for up to 3 years where English is not their first language.

- 3.1.5 Lump Sum (technical change): Fixed lump sum of £126,400 for all schools (additional amount of £667 due to an additional delegation from the centrally retained budget for schools finance to be added as part of the buy back service for 2014/15).
- 3.1.6 Sparsity (new factor introduced by DfE): Fixed sum of £100,000 for small secondary schools with 600 pupils or less where the average distance to pupil's second nearest school is more than 3 miles (applies to 1 secondary school), and a fixed sum of £100,000 for small primary schools with 150 pupils or less where the average distance to pupil's second nearest school is more than 3 miles (no schools qualify).
- 3.1.7 Rates (no change): Funded at actual cost to school.
- 3.2 The effect of the proposed formula for 2014/15 on the funding of individual schools compared to 2013/14 funding is relatively minor (see Appendix C), and is mainly as a result of realigning the funding for pupils from deprived backgrounds; the core funding a school receives per pupil has not changed.
- 3.3 Note that the final funding rates will be determined in January 2014 when the resources available from the schools block of the Dedicated Schools Grant are known (based on the October 2013 census).

Recommendation: Schools' Forum to agree the formula proposal as set out in this report, and to recommend it to the Council's Executive for approval

Appendices

Appendix A – Consultation Document to Schools

Appendix B – Option for Sparsity Funding

Appendix C – Revised Formula Exemplification (Appendix G in consultation document)

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Primary and Secondary Schools Proposed Funding Formula for 2014/15

Consultation Document for Schools 17th July 2013 to 20th September 2013

1. Introduction

- 1.1 The major formula changes introduced by the Department for Education (DfE) in 2013/14 were the first steps towards a national funding formula for schools, in that it introduced a semi prescriptive funding formula for local authorities. The DfE has reviewed and consulted on the impact of these changes and on 4th June 2013¹ announced further minor changes to the formula for 2014/15, to address some of the inflexibilities in the system. This and other documents relating to the school funding reforms can be accessed via the DfE website.²
- 1.2 The spending review on 26th June 2013 announced the intention to have a national funding formula in place for 2015/16. It states that the Government will “consult on how best to introduce a fair national funding formula for schools in 2015/16 – supporting schools reform and taking a vital step towards fixing the historic and unfair differences in funding between schools in different local authorities. In future the amount of funding a school receives will be based on a fair and rational assessment of the needs of its pupils – including how many are deprived”.
- 1.3 It should be noted that there is no additional funding available for schools, but the school budget has been protected in real terms from the widespread cuts seen across the rest of the public sector. Any formula change therefore has to be met from within the current overall funding quantum, and every change results in winners and losers.
- 1.4 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% *per pupil* (i.e. a school will not lose more than 1.5% of its *per pupil* funding). Due to the fact that further significant changes are likely in 2015/16, in order to give some stability to school budgets

¹ Department for Education: School Funding Reform: Findings from the Review of 2013-14, Arrangements and Changes for 2014-15

²

<http://www.education.gov.uk/schools/adminandfinance/financialmanagement/schoolsrevenuefunding/a00221523/review-of-2013-14-school-funding-arrangements>

for next year, only changes that are seen as necessary are proposed to be made.

- 1.5 The Heads Funding Group (HFG) met on 4th July to go through the formula in detail and consider options, and made a recommendation to Schools Forum (SF). On 15th July SF endorsed their recommendation. This document sets out the changes and rationale for the proposed formula for 2014/15.
- 1.6 Schools are invited to make comments on the proposal. Responses should be sent to Claire White, Schools' Finance Manager cwhite@westberks.gov.uk by **20th September 2013**. In order for HFG and SF to consider a response which differs with their proposal, it should be accompanied by clear rationale on how the counter proposal is a better solution and fair and equitable for all schools in West Berkshire, and not just for your own individual school.

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 the viability of 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 (FSM). These concerns were therefore considered by HFG and SF in their formula review and how, if at all, changes to the existing formula could help resolve these issues.

a) Sparsity Factor

An optional sparsity factor has been introduced by the DfE for small rural schools. This would provide funding to small schools (less than 150 pupils primary, less than 600 pupils secondary) where the average distance to pupil's second nearest school is greater than 2 miles (or more) primary, 3 miles (or more) secondary "as the crow flies". The distance criteria can be increased, but not decreased, and the pupil numbers determining a small school can be decreased. **Appendix A** models this factor using the data received from the DfE. The funding can be up to a maximum of £100,000 and can be paid as a lump sum or tapered. 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 primary schools, and it would not be right to redirect funding from all other schools (including the other small schools) to just these few schools. It was 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 and is a more realistic distance measure of sparsity. Under this measure, no primary school qualifies. The proposal is therefore to use this factor but with a distance criteria of 3 miles, and set as a lump sum of £100,000. The smallest secondary school in West Berkshire therefore qualifies for this funding under this proposal.

b) Lump Sum / Pupil funding

From 2014/15 primary schools can have a different lump sum to secondary schools, and the maximum lump sum allowed has been reduced from £200,000 to £175,000. Different lump sums were reviewed for primary schools

(**Appendix B**) and secondary schools (**Appendix C**), looking at the effect of moving funding between pupil funding (the Age Weighted Pupil Unit) and the lump sum. With a higher lump sum, smaller schools benefit 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 significant funding away from larger schools for the benefit of a minority of small 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 (at £131,000) set by all local authorities.

c) Deprivation

There has been no change to the methodologies that can be used, but the local authority and Schools' Forum is required to consider whether the total 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 percentage of pupil's from deprived backgrounds, those pupil'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 in reallocating the funding using different methodologies as follows (results shown in **Appendix D**):

- Current model of allocating 50% of the funding using the IDACI indicator, and 50% allocated using current FSM
- 50% IDACI, 50% Ever 6 FSM
- 25% IDACI, 75% current FSM
- 25% IDACI, 75% Ever 6 FSM
- 100% Ever 6 FSM

The Income Deprivation Affecting Children Index (IDACI) is split into 6 bands increasing with the percentage likelihood of a pupil coming from an income deprived household. Each of the above models targets more funding than the current model through the higher bands of this indicator, with 60% of the allocated funding for this indicator targeted to schools with pupils from a postcode where there is a 30% or more chance of that pupil coming from a deprived family (very few children in West Berkshire fall into the bands of 40% and above). As well as modelling children currently eligible for FSM, the Ever 6 FSM indicator was also modelled – this is pupils who have ever been eligible for FSM in the last 6 years.

The majority view of HFG was that as FSM Ever 6 is the criteria used by the DfE in identifying the pupils and their outcomes, this should be used rather than the current FSM method. 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 mixed housing developments. However some funding should still be allocated using IDACI as not all children eligible are actually registered for FSM by their parents.

Although there are some large winners and losers, those schools losing the most, are the schools that gained significantly in the change to the deprivation methodology in 2013/14 (2012/13 allocations are shown in the appendix for comparison). SF agreed to the recommendation that 25% IDACI, 75% FSM Ever 6 should be the proposed measure.

Schools are reminded that although deprivation funding is not ring fenced, this element of funding should be used alongside the pupil premium in raising the attainment of pupils from deprived backgrounds, and not used to prop up the general school budget.

As FSM is also used as a third of the primary notional SEN budget, the Ever 6 measure has to be applied to this element too.

d) Prior Attainment

The DfE has changed the measure that has to be used for this factor. For primary, the Early Years Foundation Stage Profile (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. No changes are proposed for this factor, with prior attainment used as a third of the total primary notional SEN budget (alongside FSM and pupil numbers) and 100% of the secondary notional SEN budget, but as the number of secondary children qualifying for this funding more than doubles, the unit funding needs to be reduced accordingly in order to maintain the existing funding quantum for the notional SEN budget. **Appendix E** illustrates this change for secondary schools based on 2012 data.

e) Exceptional Premises Factor

It has 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

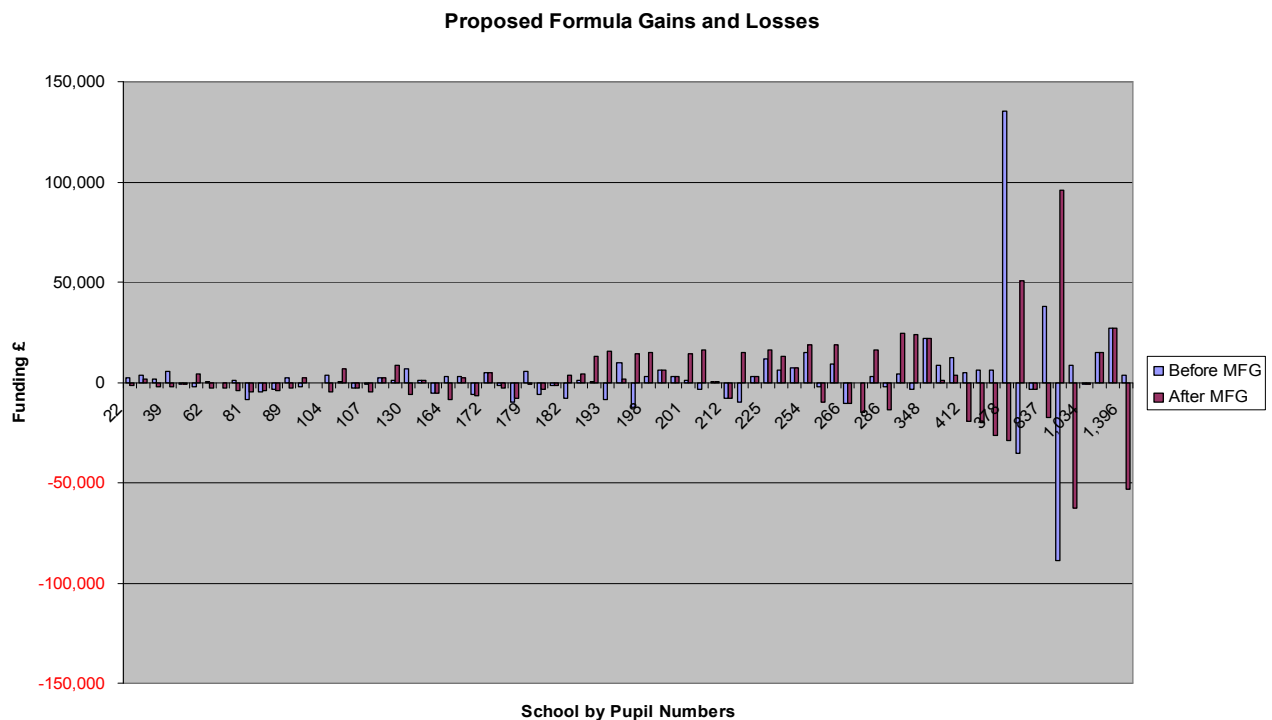
3.1 The Schools' Forum is therefore proposing the following minimal changes to the 2014/15 formula:

- 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.
- One third of the primary notional SEN budget based on Free School Meals Ever 6 rather than current free school meals eligibility.

- 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.

Note that the funding rates are indicative only, and the final rates are set in January when the October 2013 pupil numbers and other data is confirmed and the final Dedicated Schools Grant allocation for 2014/15 has been finalised.

3.2 **Appendix F** sets out the full proposed formula compared to the current formula (the changes are highlighted), and **Appendix G** (on a separate spreadsheet) shows the effect of these changes for each individual school both before and after the Minimum Funding Guarantee (MFG) and capping of gains is applied. 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. Capping of gains is required in order to meet the cost of MFG protection. The capping rate has been kept at 2.4% for the exemplification, but this may need to be amended depending on the effect of October pupil numbers on individual school budgets and whether the MFG requirement goes up or down. The DfE has stated that MFG will also apply in 2015/16 but no indication has been given on what the rate is likely to be. The following graph summarises the winners and losers both before and after MFG/capping:



Appendix G is a spreadsheet, and by entering the school cost centre in the orange box of the “school sheet” tab this will display the detailed formula for the school alongside the current funding received for each factor. Schools can also enter their expected pupil numbers for October 2013 (yellow boxes) to see their likely funding for 2014/15 and beyond. The sheets do not include any high needs funding for individual pupils i.e. top ups (and resource unit place funding), which is paid outside the formula, as top up funding is variable and follows the pupil. The top up funding rates will remain the same.

4. Additional Funding Outside the Formula

4.1 The funding regulations allow for a few exceptional circumstances to be funded outside the formula, and for each fund the Schools' Forum needs to agree the clear criteria setting out the circumstances in which a payment could be made and the basis for calculating the sum to be paid. These will be reviewed during the Autumn term with a final decision made in January 2014. Should schools have any comments on the current criteria applied they should respond as part of this consultation (these were circulated with the budget allocations in March 2013 and are available on the Schools' Finance website, alongside other documentation relating to the proposed formula).³

4.2 The funds to be reviewed are as follows:

- Growth Fund – support for schools required to provide extra places in order to meet basic need within the authority
- Falling Rolls Fund (new for 2014/15) – to support good or outstanding schools with falling rolls where local planning data shows that the surplus places will be needed in the near future
- Schools in Financial Difficulty
- Schools with a disproportionate number of high needs pupils which cannot be reflected adequately in their formula funding.

4.3 There are no proposals to change high needs funding (top ups, resource units). Place funding of £10,000 for resource units remains for 2014/15, though there will be a change to how place numbers are determined, with the aim to move to a system in 2015/16 of place funding based on actual places filled in the previous academic year.

5. De-delegations 2014/15

5.1 Last year schools received funding for newly delegated central services. For some services (where offered by the local authority), maintained primary and secondary schools can collectively opt for the service to be de-delegated – which means that the funding continues to be centrally retained for the benefit of all maintained primary and secondary schools, and individual schools cannot make that choice for themselves (Academies may be given the option to buy into the service, as can Nursery and Special schools and PRUs). The de-delegations need to be reconsidered on an annual basis.

5.2 The relevant Schools' Forum representatives for each phase will vote on whether each service is to be de-delegated or not. The current view (as expressed at SF on 15th July 2013) is as follows:

Service	Primary	Secondary
Behavioural Support	Yes	Yes
Ethnic Minority Support	Yes	Yes
Trade Union Local Representation	Yes	Yes
Contingency for schools in financial difficulty	Yes	No

³ [West Berkshire Council - Useful Resources and Newsletters](#)

5.3 **Appendix H** provides an indication of the likely charges – the unit charges per pupil and the total per school based on the data from the October 2012 census (final charges will be based on the October 2013 census data).

5.4 The final decision will be made by the Schools' Forum on 7th October. Schools may wish to contact their Schools' Forum representative direct to express their view, or respond as part of this consultation.

6. Timetable

6.1 The timetable for finalising the formula for 2014/15 is as follows:

Consultation with schools	17 th July to 20 th September 2013
Heads Funding Group consider the responses from schools and make recommendation to Schools' Forum	26 th September 2013
Schools' Forum agree the formula to recommend to the Council. Vote taken on de-delegations	7 th October 2013
Council's Executive agree school formula for 2014/15	17 th October 2013
Submission of formula to Education Funding Agency	31 st October 2013
Schools' Forum set the funding rates for the formula	20 th January 2014
Final formula submitted to Education Funding Agency	21 st January 2014
Confirmation of final budget allocations to maintained schools	28 th February 2014

Appendices

Appendix A – Sparsity Factor Model

Appendix B – Primary Lump Sum Modelling

Appendix C – Secondary Lump Sum Modelling

Appendix D – Deprivation Models

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

Appendix F – Proposed Formula - Summary

Appendix G – Proposed Formula - Exemplification for Individual Schools (see Appendix C post consultation report)

Appendix H – De-delegations proposed for 2014/15

Sparsity Factor Model

Small School Sparsity Modelling					
Cost Centre	SCHOOL	DfE Data	Oct-12	DfE Maximum Funding	
		Avg distance to next school	TOTAL NOR	£100,000 Lump sum	£100,000 OR Tapered
95600	Chaddleworth St Andrews Primary (federated)	1.55	31	0	0
95600	Shefford Primary School (federated)	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 Pri	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
 Can use this factor for one phase only.
 Can apply to SoS for EXCEPTION to exclude federated schools (as receiving 2 lump sums)

Primary Lump sum Model

PUPIL NO's	SCHOOL	Model 1: Primary lump sum £175k			Model 2: Primary lump sum £160k			Model 3: Primary lump sum £150k			Model 4: Primary lump sum £135k			Model 5: Primary lump sum £115k			Model 6: Primary lump sum £100k		
		Formula Budget	Change in Funding	%	Formula Budget	Change in Funding	%	Formula Budget	Change in Funding	%	Formula Budget	Change in Funding	%	Formula Budget	Change in Funding	%	Formula Budget	Change in Funding	%
22	Sheffield Church of England Primary School	233,131	43,444	22.9%	219,904	30,217	15.9%	211,086	21,399	11.3%	197,859	8,172	4.3%	180,222	-9,465	-5.0%	166,995	-22,682	-12.0%
31	Chaddleshall St. Andrew's Church of England Primary School	215,850	41,063	19.0%	244,410	28,560	13.2%	235,076	20,226	9.4%	223,574	7,724	3.6%	205,904	-8,946	-4.1%	194,402	-21,448	-9.9%
37	Brimpton Church of England Primary School	233,292	39,475	16.9%	260,748	27,496	11.9%	255,289	19,444	8.3%	240,717	7,428	3.2%	224,692	-8,600	-3.7%	212,674	-20,618	-8.6%
39	Purley Church of England Infants School	278,051	38,945	16.3%	266,194	27,088	11.3%	259,289	19,183	8.0%	246,932	7,325	3.1%	230,622	-8,484	-3.5%	218,784	-20,342	-8.5%
58	Enborne Church of England Primary School	304,333	33,917	11.5%	317,929	23,590	8.0%	316,598	16,706	5.5%	300,719	6,380	2.2%	286,950	-7,389	-2.5%	276,624	-17,715	-6.0%
60	The Ilesley's Primary School	333,540	33,387	11.1%	323,375	23,222	8.7%	316,598	16,445	5.5%	306,433	6,280	2.1%	292,879	-7,274	-2.4%	282,714	-17,439	-5.8%
62	305,967	32,858	10.4%	326,821	22,854	7.5%	322,152	16,185	5.3%	312,448	6,181	2.0%	298,809	-7,158	-2.3%	286,805	-17,162	-5.6%	
64	311,781	32,329	10.4%	334,267	22,848	7.2%	327,105	15,924	5.1%	317,862	6,081	2.0%	304,738	-7,043	-2.3%	294,885	-16,886	-5.4%	
78	381,102	28,623	8.1%	372,388	19,909	5.8%	366,578	14,089	4.0%	357,863	5,584	1.5%	346,243	-6,236	-1.8%	337,528	-14,951	-4.2%	
81	361,200	30,929	27,829	7.7%	394,171	19,356	5.4%	378,918	13,708	3.8%	366,435	5,238	1.4%	355,137	-6,063	-1.7%	346,684	-14,536	-4.0%
86	375,735	42,241	26,504	7.1%	394,171	18,436	4.9%	388,791	13,056	3.5%	376,921	5,999	1.3%	369,961	-5,774	-1.5%	361,880	-13,846	-3.7%
87	378,642	40,884	26,242	6.9%	396,894	18,252	4.8%	391,568	12,926	3.4%	383,578	4,936	1.3%	378,855	-5,711	-1.5%	364,936	-13,706	-3.6%
89	384,456	41,168	25,712	6.7%	402,340	17,884	4.7%	397,121	12,665	3.3%	389,292	4,836	1.3%	379,825	-5,601	-1.5%	371,026	-13,430	-3.5%
94	398,991	42,330	24,389	6.1%	415,954	16,963	4.3%	411,004	12,013	3.0%	403,572	4,587	1.1%	393,678	-5,313	-1.3%	386,252	-12,739	-3.2%
100	416,433	43,234	22,801	5.5%	432,292	15,859	3.8%	427,684	11,231	2.7%	420,722	4,289	1.0%	411,466	-4,967	-1.2%	404,524	-11,999	-2.9%
104	428,061	44,903	21,742	5.1%	443,184	15,123	3.5%	438,770	10,709	2.5%	432,151	4,090	1.0%	423,324	-4,737	-1.1%	416,705	-11,366	-2.7%
106	433,875	45,988	21,213	4.9%	448,629	14,754	3.4%	444,324	10,449	2.4%	437,865	3,990	0.9%	429,799	-4,621	-1.1%	422,799	-11,980	-2.6%
107	436,782	45,730	20,948	4.8%	451,352	14,570	3.3%	447,100	10,318	2.4%	440,722	3,940	0.9%	432,218	-4,954	-1.0%	425,840	-10,942	-2.5%
107	436,782	45,730	20,948	4.8%	451,352	14,570	3.3%	447,100	10,318	2.4%	440,722	3,940	0.9%	432,218	-4,954	-1.0%	425,840	-10,942	-2.5%
109	442,596	46,315	20,419	4.8%	458,798	14,202	3.2%	452,654	10,558	2.3%	446,437	3,841	0.9%	438,148	-4,448	-1.0%	431,931	-10,665	-2.4%
125	489,108	50,529	16,184	3.3%	500,365	11,257	2.3%	497,080	7,972	1.6%	492,152	3,044	0.6%	485,582	-3,526	-0.7%	480,655	-8,453	-1.7%
130	503,643	518,504	14,861	3.0%	513,979	10,336	2.1%	510,963	7,320	1.5%	506,438	2,795	0.6%	500,405	-3,238	-0.6%	495,881	-7,769	-1.5%
134	515,271	529,073	13,802	2.7%	524,871	9,600	1.9%	522,070	6,789	1.3%	517,867	2,598	0.5%	512,264	-3,007	-0.6%	509,082	-7,209	-1.4%
147	555,062	603,424	10,362	1.9%	560,269	7,207	1.3%	558,166	5,104	0.9%	555,011	1,949	0.4%	550,805	-2,257	-0.4%	547,650	-5,412	-1.0%
164	602,481	608,344	5,863	1.0%	606,599	4,078	0.7%	603,984	1,993	0.2%	601,204	-1,277	-0.2%	595,419	-3,062	-0.5%	589,419	-8,609	-1.4%
169	617,016	621,555	4,539	0.7%	620,173	3,157	0.5%	619,252	2,236	0.4%	617,870	854	0.1%	616,027	-889	-0.2%	614,645	-2,371	-0.4%
169	617,016	621,555	4,539	0.7%	620,173	3,157	0.5%	619,252	2,236	0.4%	617,870	854	0.1%	616,027	-889	-0.2%	614,645	-2,371	-0.4%
172	625,377	629,482	3,745	0.6%	630,511	2,053	0.3%	628,912	1,845	0.3%	626,441	705	0.1%	624,921	-816	-0.1%	623,781	-1,956	-0.3%
175	634,458	637,409	2,951	0.5%	636,511	1,454	0.2%	635,912	1,454	0.2%	635,013	555	0.1%	633,815	-643	-0.1%	632,916	-1,542	-0.2%
176	637,365	640,052	2,687	0.4%	639,234	1,889	0.3%	638,688	1,323	0.2%	637,870	505	0.1%	636,780	-685	-0.1%	635,982	-1,403	-0.2%
179	646,086	647,979	1,893	0.3%	647,402	1,312	0.2%	647,018	932	0.1%	646,442	368	0.1%	645,674	-412	-0.1%	645,097	-869	-0.2%
180	648,993	650,621	1,628	0.3%	650,125	1,132	0.2%	649,795	802	0.1%	649,289	305	0.0%	648,638	-355	-0.1%	648,143	-880	-0.2%
181	651,907	653,263	1,363	0.2%	652,848	948	0.1%	652,572	672	0.1%	652,156	256	0.0%	651,603	-297	0.0%	651,188	-712	-0.1%
182	654,807	655,906	1,099	0.2%	656,571	764	0.1%	655,348	541	0.1%	655,014	207	0.0%	654,568	-239	0.0%	654,233	-574	-0.1%
189	675,156	674,402	-754	-0.1%	674,632	-524	-0.1%	674,785	-371	-0.1%	674,914	-142	0.0%	675,220	164	0.0%	675,550	394	0.1%
190	678,063	677,044	-1,019	-0.1%	677,355	-708	-0.1%	677,561	-502	-0.1%	677,871	-192	0.0%	678,285	222	0.0%	678,595	532	0.1%
193	686,784	684,971	-1,813	-0.3%	685,523	-1,261	-0.2%	686,891	-863	-0.1%	688,443	-341	0.0%	687,179	395	0.1%	687,731	947	0.1%
196	695,505	692,888	-2,617	-0.4%	693,692	-1,813	-0.3%	694,221	-1,284	-0.2%	695,015	-490	-0.1%	696,073	568	0.1%	696,866	1,361	0.2%
197	701,319	698,183	-3,136	-0.4%	699,138	-2,181	-0.3%	699,774	-1,545	-0.2%	700,729	-590	-0.1%	702,002	683	0.1%	702,957	1,638	0.2%
198	704,226	700,826	-3,400	-0.5%	701,861	-2,365	-0.3%	702,551	-1,675	-0.2%	703,586	-640	-0.1%	704,967	741	0.1%	706,002	1,776	0.3%
199	710,040	706,110	-3,930	-0.6%	707,307	-2,733	-0.4%	708,104	-1,936	-0.3%	709,301	-739	-0.1%	710,896	856	0.1%	712,093	2,063	0.3%
201	730,389	724,607	-5,782	-0.8%	728,367	-4,022	-0.5%	727,541	-2,848	-0.4%	729,301	-1,088	-0.1%	731,613	1,260	0.2%	733,409	3,020	0.4%
208	733,298	727,249	-6,049	-0.8%	729,080	-4,209	-0.6%	730,317	-2,979	-0.4%	732,159	-1,137	-0.2%	734,613	1,317	0.2%	736,455	3,159	0.4%
212	742,017	735,176	-6,841	-0.9%	737,259	-4,758	-0.6%	738,647	-3,370	-0.5%	740,730	-1,287	-0.2%	743,507	1,490	0.2%	745,590	3,573	0.5%
216	753,645	745,745	-7,900	-1.0%	748,150	-5,495	-0.7%	749,574	-3,891	-0.5%	752,159	-1,588	-0.2%	755,366	1,721	0.2%	757,771	4,126	0.5%
218	759,459	751,030	-8,429	-1.1%	753,596	-5,863	-0.8%	755,307	-4,152	-0.5%	757,874	-1,565	-0.2%	761,959	1,836	0.2%	763,862	4,403	0.6%
225	779,808	769,526	-10,282	-1.3%	772,657	-7,151	-0.9%	774,744	-5,064	-0.6%	777,874	-1,934	-0.2%	782,048	2,240	0.3%	785,178	5,370	0.7%
225	779,808	769,526	-10,282	-1.3%	772,657	-7,151	-0.9%	774,744	-5,064	-0.6%	777,874	-1,934	-0.2%	782,048	2,240	0.3%	785,178	5,370	0.7%
230	794,343	782,738	-11,605	-1.5%	786,271	-8,072	-1.0%	788,627	-5,716	-0.7%	792,160	-2,183	-0.3%	796,821	2,528	0.3%	800,404	6,081	0.8%
254	864,111	846,154	-17,957	-2.1%	851,621	-12,489	-1.5%	855,266	-8,845	-1.0%	860,733	-3,378	-0.4%	868,023	3,912	0.5%	873,480	9,379	1.1%
256	869,925	851,439	-18,486	-2.1%	857,067	-12,858	-1.5%	860,819	-9,106	-1.0%	866,448	-3,477	-0.4%	873,952	4,027	0.5%	879,581	9,666	1.1%
266	898,995	871,832	-27,163	-3.0%	884,296	-14,689	-1.6%	886,586	-10,400	-1.2%	895,020	-3,975	-0.4%	903,599	4,604	0.5%	910,033	11,036	1.2%
269	902,751	886,769	-15,982	-1.8%	892,465	-15,251	-1.7%	896,790	-11,482	-1.2%	917,878	-4,373	-0.5%	927,316	5,065	0.5%	93		

Secondary Lump sum Model

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	Change in Funding		Formula Budget	Change in Funding		Formula Budget	Change in Funding		Formula Budget	Change in Funding		Formula Budget	Change in Funding		Formula Budget	Change in Funding		Formula Budget	Change in Funding	
			£	%		£	%		£	%		£	%		£	%		£	%		£	%
John O'Gaunt Community Technology College	378	1,687,720	-75,509	-4.3%	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%	1,763,229			1,792,816	29,587	1.7%
Trinity School & Performing Arts College	694	3,098,618	-33,523	-1.1%	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%	3,132,141			3,145,276	13,135	0.4%
The Willink School	836	3,747,285	-14,655	-0.4%	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%	3,747,285			3,753,028	5,743	0.2%
Park House School	837	3,737,095	-14,522	-0.4%	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%	3,751,617			3,757,307	5,690	0.2%
Denetield School	842	3,759,419	-13,858	-0.4%	3,767,665	-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%	3,773,277			3,778,707	5,430	0.1%
The Downs School	896	4,000,522	-6,683	-0.2%	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%	4,007,205			4,009,824	2,619	0.1%
Theale Green Community School	1,034	4,616,674	11,653	0.3%	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%	4,605,021			4,600,455	-4,566	-0.1%
St. Bartholomew's School	1,250	5,581,085	40,352	0.7%	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%	5,540,733			5,524,922	-15,811	-0.3%
Little Heath School	1,300	5,804,328	46,995	0.8%	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%	5,757,333			5,738,918	-18,415	-0.3%
Kennet School	1,396	6,232,956	59,751	1.0%	6,197,314	24,109	0.4%	6,178,306	5,101	0.1%	6,161,673	-11,632	-0.2%	6,149,792	-23,413	-0.4%	6,173,205			6,149,792	-23,413	-0.4%
SECONDARY TOTAL	9,463	42,251,046	0		42,251,046	0		42,251,046	0		42,251,046	0		42,251,046	0		42,251,046	0		42,251,046	0	

Deprivation Model

Deprivation Funding Reworked		ACTUAL		ALLOCATION OPTIONS USING REVISED UNIT VALUES FOR IDACI									
Centre Cost	SCHOOL	Allocation 2012/13 (equivalent)	Allocation 2013/14 (excluding SEN element)	50/50 IDACI/Current FSM (current model)		50/50 IDACI/Ever6 FSM		25/75 IDACI/Current FSM		25/75 IDACI/Ever6 FSM		100 % Ever6 FSM	
				Funding	Change	Funding	Change	Funding	Change	Funding	Change	Funding	Change
91000	Aldermaston Church of England Primary School	13,464	12,001	11,731	-270	13,290	1,289	10,919	-1,082	13,264	1,263	13,237	1,236
91100	Basildon Church of England Primary School	8,020	4,312	4,123	-190	3,863	-449	5,764	1,452	5,380	1,067	6,896	2,584
91300	Beedon Church of England Controlled Primary	7,802	2,590	2,400	-190	3,980	1,390	3,038	448	5,410	2,820	6,840	4,250
91400	Beenham Primary School	7,181	4,740	4,699	-41	2,881	-1,859	6,485	1,745	3,763	-977	4,644	-96
91200	Birch Copse Primary School	18,904	15,197	15,314	117	16,518	1,321	15,026	-171	16,840	1,644	17,163	1,966
91500	Bradfield Church of England Primary School	14,138	7,880	7,683	-197	6,093	-1,786	10,936	3,056	8,560	680	11,027	3,147
91600	Brightwalton Church of England Aided Primary	8,136	2,300	2,300	0	1,706	-594	3,447	1,147	2,559	259	3,412	1,112
91700	Brimpton Church of England Primary School	5,634	700	856	156	1,572	872	428	-272	1,502	802	1,432	732
91800	Bucklebury Church of England Primary School	7,026	4,580	4,298	-282	4,019	-561	5,824	1,244	5,411	831	6,803	2,223
91900	Burghfield St. Mary's Church of England Primary	10,191	3,670	3,664	-6	4,706	1,036	5,048	1,378	6,614	2,944	8,522	4,852
92000	Calcot Infant School & Nursery	17,829	39,769	36,552	-3,213	35,464	-4,301	35,990	-3,775	34,380	-5,385	33,296	-6,469
92100	Calcot Junior School	18,545	40,885	35,746	-5,139	33,285	-7,600	34,413	-6,472	30,741	-10,144	28,198	-12,688
95600	Chaddlesholt St. Andrew's Church of England	5,229	2,300	2,300	0	3,113	813	3,447	1,147	4,670	2,370	6,227	3,927
92400	Chieveley Primary School	8,993	4,787	4,877	90	6,453	1,666	5,211	424	7,578	2,791	8,703	3,916
95900	Cold Ash St. Mark's Church of England Primary	7,284	1,150	1,119	-31	1,684	534	560	-590	1,407	257	1,129	-21
92200	Compton Church of England Primary School	11,053	5,060	5,060	0	6,340	1,280	7,584	2,524	9,509	4,449	12,679	7,619
92300	Curridge Primary School	5,220	1,160	1,225	65	1,350	190	1,072	-88	1,259	99	1,169	9
92500	Downsway Primary School	14,566	13,682	15,216	1,534	14,792	1,109	14,500	817	13,871	189	12,951	-732
92800	Enborne Church of England Primary School	5,284	3,980	3,976	-4	2,696	-1,284	5,664	1,684	3,749	-231	4,801	821
92900	Englefield Church of England Primary School	7,909	3,992	4,357	365	3,540	-452	3,597	-395	2,372	-1,620	1,204	-2,788
93000	Falkland Primary School	19,815	7,570	8,378	808	10,386	2,816	7,405	-165	10,420	2,850	10,455	2,885
93100	Fir Tree Primary School & Nursery	28,213	62,706	73,239	10,533	71,394	8,688	58,673	-4,034	55,932	-6,774	40,470	-22,237
93200	Francis Baily Primary School	31,707	23,596	20,956	-2,641	21,464	-2,132	25,639	2,043	26,420	2,824	31,377	7,781
93400	Garland Junior School	22,896	20,058	19,674	-384	17,489	-2,569	28,214	8,156	24,960	4,902	32,431	12,372
93500	Hampstead Norreys Church of England Primary	4,740	2,300	2,300	0	2,957	657	3,447	1,147	4,435	2,135	5,913	3,613
93600	Hermitage Primary School	11,698	1,849	1,849	0	3,498	1,649	2,772	922	5,247	3,398	6,996	5,147
93700	Hungerford Primary School	30,984	18,610	18,606	-4	19,370	759	27,585	8,975	28,752	10,142	38,135	19,524
92700	The Isleys' Primary School	7,721	2,300	2,300	0	1,998	-302	3,447	1,147	2,997	697	3,997	1,697
93800	Inkpen Primary School	5,341	2,750	2,744	-6	2,301	-449	3,669	919	3,007	257	3,713	963
93900	John Rankin Infant & Nursery School	10,415	9,099	10,421	1,322	10,910	1,811	8,427	-672	9,164	64	7,417	-1,682
94000	John Rankin Primary School	15,655	12,830	13,590	760	17,473	4,643	12,768	-62	18,599	5,769	19,725	6,895
94100	Kennet Valley Primary School	20,331	19,297	19,635	338	19,579	282	21,763	2,466	21,693	2,396	23,808	4,511
94200	Kintbury St. Mary's Church of England Primary	13,265	8,492	8,582	90	8,602	110	10,763	2,271	10,800	2,308	12,998	4,506
94300	Lambourne Church of England Primary School	20,434	33,015	25,398	-7,616	25,728	-7,286	21,428	-11,586	21,934	-11,080	18,140	-14,875
94400	Long Lane Primary School	17,876	14,100	15,502	1,402	15,260	1,160	16,940	2,840	16,588	2,488	17,916	3,816
95800	Mortimer St. Johns Church of England Infant S	11,780	6,130	6,128	-2	2,471	-3,659	9,037	2,907	3,559	-2,571	4,646	-1,484
97500	Mortimer St. Mary's Church of England Junior S	15,507	5,200	5,159	-41	6,805	1,605	7,174	1,974	9,648	4,448	12,491	7,291
94500	Mrs. Bland's Infant & Nursery School	15,319	14,631	14,530	-100	11,607	-3,024	21,125	6,494	16,757	2,126	21,906	7,276
94600	Pangbourne Primary School	12,819	6,895	7,368	473	9,941	3,046	8,764	1,869	12,630	5,734	15,318	8,423
94700	Parsons Down Infant School	17,788	17,666	19,143	1,477	17,018	-648	20,773	3,107	17,599	-67	18,180	514
94800	Parsons Down Junior School	21,199	17,967	19,374	1,407	22,909	4,942	20,714	2,746	26,030	8,062	29,150	11,183
94900	Purley Church of England Infants School	5,075	2,940	3,255	315	2,840	-100	3,465	525	2,845	-95	2,850	-90
95000	Robert Sandilands Primary School & Nursery	24,245	44,590	37,380	-7,210	37,263	-7,327	32,014	-12,576	31,854	-12,736	26,446	-18,144
95100	Shaw-cum-Domnington Church of England Prim	8,664	11,976	12,304	328	8,411	-3,564	14,422	2,446	8,593	-3,383	8,774	-3,201
95200	Sheffield Church of England Primary School	6,023	2,140	2,046	-94	2,406	266	2,861	721	3,404	1,264	4,401	2,261
95300	Speenhamland Primary School	28,183	42,540	41,422	-1,118	38,672	-3,868	38,487	-4,053	34,383	-8,156	30,995	-12,445
95400	Springfield Primary School	21,843	16,125	15,840	-285	14,528	-1,596	16,680	555	14,723	-1,402	14,018	-1,207
95500	Spurcroft Primary School	28,961	15,218	15,672	455	20,771	5,554	20,812	5,595	28,477	13,259	36,182	20,965
95700	St. Finian's Catholic Primary School	9,879	7,870	7,311	-569	7,519	-351	6,871	-999	7,188	-682	6,857	-1,013
97700	St. John the Evangelist Infant & Nursery School	14,024	20,020	19,605	-415	19,395	-625	15,315	-4,705	15,008	-5,012	10,621	-9,399
97800	St. Joseph's Catholic Primary School	18,028	33,601	31,707	-1,894	29,968	-3,632	24,165	-9,435	21,568	-12,033	13,167	-20,433
96200	St. Nicolas Church of England Junior School	21,784	27,605	28,383	778	32,981	5,375	22,461	-5,144	29,368	1,763	25,755	-1,850
96100	St. Pauls Catholic Primary School	22,295	27,885	31,025	3,139	31,884	3,999	20,121	-7,765	21,416	-6,470	10,947	-16,938
96300	Stockcross Church of England Primary School	6,157	3,478	4,297	820	3,849	372	3,567	89	2,896	-581	1,943	-1,534
96400	Strealey Church of England Voluntary Control	4,033	2,733	2,896	163	1,695	-1,038	3,770	1,037	1,971	-762	2,247	-486
96500	Sulhamstead and Upton Nervet Church of Engle	7,356	1,380	1,380	0	1,843	463	2,068	688	2,765	1,385	3,687	2,307
99700	Thatcham Park Church of England Primary Sch	35,329	41,457	34,952	-6,056	38,230	-3,227	35,445	-6,013	40,385	-1,073	42,539	1,082
96600	Theale Church of England Primary School	21,009	10,862	10,408	-454	9,909	-953	14,469	3,608	13,732	2,871	17,556	6,694
96700	Welford and Wickham Church of England Prim	6,025	3,510	3,320	-190	1,495	-2,015	4,417	907	1,683	-1,827	1,871	-1,639
96800	Westwood Farm Infant School	14,081	17,043	19,177	2,133	16,182	-862	15,461	-1,582	10,976	-6,068	5,770	-11,274
96900	Westwood Farm Junior School	18,611	10,830	13,280	2,450	15,905	5,076	8,438	-2,392	12,378	1,549	8,851	-1,979
97000	Whitelands Park Primary School	32,925	40,977	39,018	-1,959	36,547	-4,430	49,464	8,487	45,794	4,817	55,041	14,064
98700	The Willows Primary School	35,462	67,600	81,187	13,587	77,175	9,575	68,159	559	62,176	-5,424	47,177	-20,423
99400	The Winchcombe School	42,139	66,791	63,348	-3,443	64,242	-2,549	58,482	-8,309	59,855	-6,935	55,469	-11,322
97300	Woolhampton Church of England Primary School	8,457	5,067	4,855	-212	5,506	439	5,216	149	6,194	1,128	6,883	1,816
97400	Yattendon Church of England Primary School	4,770	152	150	-2	460	308	75	-77	540	388	620	468
98900	Denefield School	150,110	279,461	285,032	5,570	232,248	-47,214	277,097	-2,364	197,740	-81,721	163,233	-116,229
98800	The Downs School	76,533	39,802	39,830	28	40,124	322	58,367	18,565	58,756	18,954	77,388	37,587
99000	John O'Gaunt Community Technology College	57,469	42,400	41,060	-1,340	52,252	9,852	50,170	7,770	66,919	24,519	81,585	39,185
99100	Kennet School	189,662	142,495	138,535	-3,959	130,888	-11,606	167,873	25,378	156,269	13,775	181,650	39,156
99200	Little Heath School	194,485	156,669	156,478	-191	158,967	2,298	144,729	-11,941	148,373	-8,297	137,778	-18,891
99300	Park House School	116,518	115,436	118,337	2,901	138,188	22,752	108,836	-6,600	138,545	23,109	138,902	23,466
99800	St. Bartholomew's School	157,929	148,175	146,913	-1,262	163,821	15,646	127,930	-20,245	153,218	5,043	142,616	-5,560
99500	Theale Green Community School	154,035	179,248	179,723	475	179,847	599	164,228	-15,020	164,314	-14,934	148,781	-30,467
99900	Trinity School & Performing Arts College	152,856	181,863	179,521	-2,342	187,692	5,830	172,922	-8,941	185,067	3,204	182,442	579
99600	The Willink School	99,979	54,433	53,950	-483	55,953	1,520	67,830	13,397	70,780	16,347	85,607	31,174
PRIMARY TOTAL		1,003,259	1,006,182	1,006,595	413	1,006,182	0	1,006,182	0	1,006,182	0	1,006,182	0
SECONDARY TOTAL		1,349,577	1,339,981	1,339,378	-603	1,339,981	0	1,339,981	0	1,339,981	0	1,339,981	0
TOTAL ALL SCHOOLS		2,352,835	2,346,164	2,346,973	-190	2,346,164	0	2,346,164	0	2,346,164	0	2,346,164	0

Appendix E

Change to Secondary Prior Attainment

Cost Centre	DfE Ref	SCHOOL	2013/14 Prior Attainment			2014/15 Prior Attainment			Difference
			Secondary KS2		Primary: £382	Secondary KS2		Primary: £382	
		DfE % No		Secondary: £2,570	DfE % No		Secondary: £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

Proposed Formula 2014/15

2014/15 School Formula Recommendation							
	2014/15	2013/14 FINAL			2014/15 School Forum Recommendation		
	PROPOSED CHANGE	RATE £	UNITS	ACTUAL TOTAL FUNDING £	RATE £	UNITS	ESTIMATED TOTAL FUNDING £
PUPIL FUNDING							
Primary		2,844	12,286	34,941,384	2,844	12,286	34,941,384
Secondary		4,332	9,463	40,993,716	4,332	9,463	40,993,716
NOTIONAL SEN FUNDING							
Primary Prior Attainment		382	2,012	768,631	382	2,012	768,631
Primary FSM / EVER 6	Wider range of pupils (FSM Ever 6) so reduce funding rate accordingly	700	1,095	766,199	442	1,734	766,516
Primary Pupil No's		63	12,286	774,018	63	12,286	774,018
Secondary Prior Attainment	Wider range of pupils so reduce funding rate accordingly	2,570	903	2,320,465	1,010	2,299	2,321,539
DEPRIVATION							
Primary FSM / EVER 6	Increase proportion of funding via FSM, and using Ever 6 widens the range of pupils	460	1,095	503,502	450	1,734	780,390
Primary IDACI Band 1	Reduce proportion of funding via IDACI, and targetted to higher bandings	150	340		50	340	
Primary IDACI Band 2		300	733		150	733	
Primary IDACI Band 3		400	460		300	460	
Primary IDACI Band 4		600	79		300	79	
Primary IDACI Band 5/6		600	1	502,683	300	1	288,835
Secondary FSM / EVER6	Increase proportion of funding via FSM, and using Ever 6 widens the range of pupils	800	837	669,384	700	1,421	994,777
Secondary IDACI Band 1	Reduce proportion of funding via IDACI, and targetted to higher bandings	200	317		60	317	
Secondary IDACI Band 2		400	574		180	574	
Secondary IDACI Band 3		600	572		360	572	
Secondary IDACI Band 4		800	34		360	34	
Secondary IDACI Band 5/6		1,000	7	670,597	360	7	343,124
EAL							
Primary		420	456	191,709	420	456	191,709
Secondary		420	66	27,890	420	66	27,890
RATES							
Primary			Actual	610,011		Actual	610,011
Secondary			Actual	400,145		Actual	400,145
LUMP SUM							
Primary		125,733	66	8,298,378	125,733	66	8,298,378
Secondary		125,733	10	1,257,330	125,733	10	1,257,330
SPARSITY							
Primary	New factor				100,000	0	0
Secondary	New factor				100,000	1	100,000
MFG/CAP							
Primary	(cap @ 2.4%)	220,648			(cap @ 2.4%)	269,526	
Secondary		171,851		392,499	94,625		364,151
TOTAL ALLOCATION							
PRIMARY				94,088,541			94,222,544
SECONDARY		12,286		47,577,163	12,286		47,689,398
Secondary:Primary Ratio		9,463		46,511,378	9,463		46,533,146
				1.27			1.27
AVAILABLE FUNDING:							
Guaranteed Unit of Funding		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			-113,320

Appendix H

Proposed De-delegations 2014/15

Cost Centre	School	De-Delegations per School from April 2014							
		Data		Behaviour Support	Ethnic Minority Support	Trade Union Representation	Contingency Financial diff	TOTAL	
		Pupil No's Oct-12	EAL Pupils	Method: Primary £: Sec'y £: Total £:	Pupil No's £14.04 £3.62	EAL Pupils £426.18 £349.80	Pupil no's £2.06 £3.50	Pupil No's £9.53 £30.66	
Primary Schools									
91000	Aldermaston Church of England Primary School	169	8		2,373	3,550	348	1,611	7,882
91100	Basildon Church of England Primary School	134	0		1,882	0	276	1,277	3,435
91300	Beedon Church of England Controlled Primary School	39	0		548	0	80	372	1,000
91400	Beenham Primary School	87	1		1,222	545	179	829	2,775
91200	Birch Copse Primary School	412	4		5,786	1,509	849	3,926	12,070
91500	Bradfield Church of England Primary School	175	0		2,457	0	361	1,668	4,486
91600	Brightwalton Church of England Aided Primary School	100	0		1,404	0	206	953	2,563
91700	Brimpton Church of England Primary School	37	0		520	0	76	353	948
91800	Bucklebury Church of England Primary School	125	1		1,755	498	258	1,191	3,702
91900	Burghfield St. Mary's Church of England Primary School	172	1		2,415	513	354	1,639	4,921
92000	Calcot Infant School & Nursery	208	22		2,921	9,546	428	1,982	14,878
92100	Calcot Junior School	216	5		3,033	2,131	445	2,058	7,668
95600	Chaddleworth St. Andrew's Church of England Primary School	31	0		435	0	64	295	795
92400	Chieveley Primary School	179	4		2,514	1,546	369	1,706	6,135
95900	Cold Ash St. Mark's Church of England Primary School	189	1		2,654	494	389	1,801	5,339
92200	Compton Church of England Primary School	130	1		1,826	513	268	1,239	3,845
92300	Curridge Primary School	106	1		1,489	496	218	1,010	3,213
92500	Downsway Primary School	209	2		2,935	995	431	1,992	6,352
92800	Enborne Church of England Primary School	60	1		843	511	124	572	2,049
92900	Englefield Church of England Primary School	107	1		1,503	512	220	1,020	3,255
93000	Falkland Primary School	427	8		5,996	3,471	880	4,069	14,411
93200	Francis Baily Primary School	522	12		7,330	5,045	1,075	4,975	18,425
93400	Garland Junior School	198	4		2,780	1,705	408	1,887	6,780
93500	Hampstead Norreys Church of England Primary School	104	1		1,460	492	214	991	3,158
93600	Hermitage Primary School	198	1		2,780	499	408	1,887	5,575
93700	Hungerford Primary School	402	5		5,645	2,077	828	3,831	12,381
92700	The Ilsleys' Primary School	62	0		871	0	128	591	1,589
93800	Inkpen Primary School	64	0		899	0	132	610	1,640
93900	John Rankin Infant & Nursery School	201	19		2,823	8,123	414	1,916	13,275
94000	John Rankin Junior School	225	2		3,160	856	464	2,144	6,624
94100	Kennet Valley Primary School	199	21		2,794	8,980	410	1,896	14,081
94200	Kintbury St. Mary's Church of England Primary School	164	1		2,303	522	338	1,563	4,725
94300	Lambourne Church of England Primary School	169	10		2,373	4,116	348	1,611	8,448
94400	Long Lane Primary School	274	10		3,848	4,307	564	2,611	11,331
95800	Mortimer St. Johns Church of England Infant School	182	9		2,556	3,878	375	1,734	8,543
97500	Mortimer St. Mary's Church of England Junior School	230	1		3,230	426	474	2,192	6,322
94500	Mrs. Bland's Infant & Nursery School	181	6		2,542	2,593	373	1,725	7,232
94600	Pangbourne Primary School	196	1		2,752	500	404	1,868	5,524
94700	Parsons Down Infant School	256	22		3,595	9,429	527	2,440	15,990
94800	Parsons Down Junior School	254	7		3,567	2,983	523	2,421	9,494
94900	Purley Church of England Infants School	58	5		814	1,951	119	553	3,438
95000	Robert Sandilands Primary School & Nursery	212	14		2,977	5,957	437	2,020	11,391
95100	Shaw-cum-Donnington Church of England Primary School	81	1		1,137	515	167	772	2,591
95200	Shefford Church of England Primary School	22	1		309	469	45	210	1,033
95300	Speenhamland Primary School	266	22		3,735	9,244	548	2,535	16,062
95400	Springfield Primary School	286	5		4,016	1,998	589	2,726	9,329
95500	Spurcroft Primary School	348	13		4,887	5,704	717	3,316	14,624
95700	St. Finian's Catholic Primary School	190	0		2,668	0	391	1,811	4,870
97700	St. John the Evangelist Infant & Nursery School	180	17		2,528	7,032	371	1,715	11,646
97800	St. Joseph's Catholic Primary School	197	22		2,766	9,495	406	1,877	14,545
96200	St. Nicolas Church of England Junior School	256	4		3,595	1,705	527	2,440	8,267
96100	St. Pauls Catholic Primary School	327	52		4,592	22,360	674	3,116	30,742
96300	Stockcross Church of England Primary School	107	1		1,503	512	220	1,020	3,255
96400	Streatley Church of England Voluntary Controlled Primary School	94	0		1,320	0	194	896	2,409
96500	Sulhamstead and Ufton Nerve Church of England Voluntary School	109	1		1,531	499	225	1,039	3,293
99700	Thatcham Park Church of England Primary School	353	6		4,957	2,567	727	3,364	11,616
96600	Theale Church of England Primary School	218	7		3,061	3,080	449	2,078	8,668
96700	Welford and Wickham Church of England Primary School	86	1		1,208	495	177	820	2,700
96800	Westwood Farm Infant School	176	11		2,472	4,526	363	1,677	9,038
96900	Westwood Farm Junior School	225	4		3,160	1,668	464	2,144	7,435
97000	Whitelands Park Primary School	326	10		4,578	4,071	672	3,107	12,428
98700	The Willows Primary School	193	20		2,710	8,546	398	1,839	13,493
99400	The Wincombe School	269	30		3,777	12,978	554	2,564	19,873
97300	Woolhampton Church of England Primary School	89	0		1,250	0	183	848	2,281
97400	Yattendon Church of England Primary School	78	0		1,095	0	161	743	1,999
Secondary Schools									
98800	The Downs School	896	2		3,247	700	3,136	27,471	34,554
99000	John O'Gaunt Community Technology College	378	1		1,370	350	1,323	11,589	14,632
99200	Little Heath School	1,300	7		4,710	2,450	4,550	39,858	51,569
99600	The Willink School	836	2		3,029	700	2,926	25,632	32,287
Academies (not part of dedelegation)									
98900	Denefield School	842	15		3,051	5,247	2,947	25,816	37,061
93100	Fir Tree Primary School & Nursery	147	14		2,064	5,791	303	1,401	9,559
99100	Kennet School	1,396	4		5,058	1,369	4,886	42,801	54,114
99300	Park House School	837	11		3,033	3,857	2,930	25,662	35,482
99800	St. Bartholomew's School	1,250	10		4,529	3,504	4,375	38,325	50,733
99500	Theale Green Community School	1,034	1		3,747	345	3,619	31,702	39,413
99900	Trinity School & Performing Arts College	694	13		2,515	4,707	2,429	21,278	30,929
PRIMARY TOTAL		12,139	443		170,464	188,737	25,006	115,685	499,892
SECONDARY TOTAL		3,410	12		12,356	4,199	11,935	104,551	133,041
ACADEMY TOTAL		6,200	68		23,997	24,820	21,488	186,986	257,291
TOTAL ALL SCHOOLS		21,749	523		206,816	217,757	58,430	407,221	890,224

Small School Sparsity Modelling - Post Consultation

Cost Centre	SCHOOL	DfE Data Avg distance school	Oct-12 TOTAL NOR	Current - 3	Option 1:	Option 2: 100
				mile parameter £100,000 Lump sum	150 pupils £100,000 Tapered	pupils & reduce funding £50,000 Tapered
95600	Chaddleworth St Andrews Primary (federated)	1.55	31	0	0	0
95600	Shefford Primary School (federated)	2.38	22	0	85,333	39,000
91700	Brimpton Church of England Primary School	1.58	37	0	0	0
91300	Beedon Church of England Controlled Primary School	1.98	39	0	0	0
94900	Purley Church of England Infants School	0.47	58	0	0	0
92800	Enborne Church of England Primary School	1.46	60	0	0	0
92700	The Ilsleys' Primary School	2.10	62	0	58,667	19,000
93800	Inkpen Primary School	1.80	64	0	0	0
97400	Yattendon Church of England Primary School	2.09	78	0	48,000	11,000
95100	Shaw-cum-Donnington Church of England Primary School	0.51	81	0	0	0
96700	Welford and Wickham Church of England Primary School	2.09	86	0	42,667	7,000
91400	Beenham Primary School	1.24	87	0	0	0
97300	Woolhampton Church of England Primary School	1.31	89	0	0	0
96400	Streatley Church of England Voluntary Controlled Primary School	1.08	94	0	0	0
91600	Brightwalton Church of England Aided Primary School	1.80	100	0	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 Nerve Church of England Voluntary Aided Prim	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	0	10,667	
93100	Fir Tree Primary School & Nursery	0.69	147	0	0	
99000	John O Gaunt Secondary	6.75	378	100,000		
TOTAL ADDITIONAL FUNDING				£100,000	£245,333	£76,000

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
- Can use this factor for one phase only.
- Can apply to SoS for EXCEPTION to exclude federated schools (as receiving 2 lump sums)

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**SUMMARY DATA - 2014/15 Budget Allocations Compared to 2013/14 Equivalent
2014/15 School Formula Proposal - Schools' Forum October 2013**

Cost Centre	SCHOOL	2013/14 ACTUAL FORMULA (prior to MFG/Capping)			2014/15 NEW FORMULA Exemplification			Change due to Formula (Same pupil no's)	MFG / (CAP)			Overall Change (inc. Protection)
		Formula Budget	Pupil No's (Oct 2012)	Per Pupil Funding	Formula Budget	Pupil No's (Oct 2012)	Per Pupil Funding		Before MFG	2013/14	2014/15	
95200	Shefford Church of England Primary School	199,199	22	9,054.51	201,843	22	9,174.67	2,643	16,468	12,538	-3,930	-1,286
95600	Chaddleworth St. Andrew's Church of England Primary School	226,573	31	7,308.81	231,013	31	7,452.04	4,440	2,324	0	-2,324	2,117
91700	Brimpton Church of England Primary School	237,260	37	6,412.44	239,829	37	6,481.86	2,568	25,773	21,190	-4,582	-2,014
91300	Beedon Church of England Controlled Primary School	249,411	39	6,395.14	255,554	39	6,552.67	6,143	18,159	9,927	-8,232	-2,089
94900	Purley Church of England Infants School	304,383	58	5,247.99	304,392	58	5,248.14	9	0	0	0	9
92800	Enborne Church of England Primary School	313,051	60	5,217.52	311,618	60	5,193.64	-1,433	-7,221	-1,495	5,726	4,294
92700	The Ilsleys' Primary School	319,554	62	5,154.09	320,565	62	5,170.40	1,011	3,518	0	-3,518	-2,507
93800	Inkpen Primary School	321,819	64	5,028.43	322,095	64	5,032.73	276	14,221	10,837	-3,384	-3,108
97400	Yattendon Church of England Primary School	354,316	78	4,542.51	355,835	78	4,561.98	1,519	33,495	28,069	-5,426	-3,907
95100	Shaw-cum-Donnington Church of England Primary School	395,799	81	4,886.41	387,709	81	4,786.53	-8,090	46,664	50,080	3,416	-4,674
96700	Welford and Wickham Church of England Primary School	390,123	86	4,536.32	386,307	86	4,491.94	-3,816	20,435	20,051	-383	-4,200
91400	Beenham Primary School	400,110	87	4,598.97	397,177	87	4,565.25	-2,933	1,024	0	-1,024	-3,958
97300	Woolhampton Church of England Primary School	398,488	89	4,477.39	401,282	89	4,068.79	2,794	5,053	0	-5,053	-2,258
96400	Strealey Church of England Voluntary Controlled Primary School	414,805	94	4,412.82	412,962	94	4,393.22	-1,843	-4,824	0	4,824	2,981
91600	Brightwalton Church of England Aided Primary School	425,084	100	4,250.84	425,196	100	4,251.96	112	0	0	0	112
93500	Hampstead Norreys Church of England Primary School	446,507	104	4,293.33	450,465	104	4,331.39	3,958	10,223	1,443	-8,780	-4,821
92300	Curridge Primary School	442,974	106	4,179.00	444,027	106	4,188.94	1,053	-6,028	0	6,028	7,082
92900	Englefield Church of England Primary School	449,994	107	4,205.55	448,057	107	4,187.45	-1,936	0	0	0	-1,936
96300	Stockcross Church of England Primary School	446,319	107	4,171.21	445,879	107	4,167.09	-440	4,830	409	-4,421	-4,861
96500	Sulhamstead and Ufton Nervet Church of England Voluntary Controlled Primary School	453,616	109	4,161.61	456,471	109	4,187.81	2,855	0	0	0	2,855
91800	Bucklebury Church of England Primary School	513,931	125	4,111.45	515,327	125	4,122.62	1,396	-9,827	-2,352	7,475	8,871
92200	Compton Church of England Primary School	529,739	130	4,074.92	537,139	130	4,131.84	7,400	17,980	4,370	-13,610	-6,210
91100	Basildon Church of England Primary School	536,766	134	4,005.72	538,383	134	4,017.79	1,617	0	0	0	1,617
93100	Fir Tree Primary School & Nursery	670,606	147	4,561.95	665,629	147	4,528.09	-4,978	0	0	0	-4,978
94200	Kintbury St. Mary's Church of England Primary School	637,350	164	3,886.28	640,855	164	3,907.65	3,505	53,963	42,099	-11,864	-8,359
91000	Aldermaston Church of England Primary School	670,107	169	3,965.13	673,838	169	3,987.21	3,731	991	0	-991	2,740
94300	Lambourn Church of England Primary School	693,130	169	4,101.36	687,508	169	4,068.09	-5,622	332	0	-332	-5,954
91900	Burghfield St. Mary's Church of England Primary School	643,890	172	3,743.55	649,240	172	3,774.65	5,349	0	0	0	5,349
91500	Bradfield Church of England Primary School	670,024	175	3,828.71	669,318	175	3,824.67	-707	1,573	0	-1,573	-2,280
96800	Westwood Farm Infant School	680,141	176	3,864.44	670,979	176	3,812.38	-9,162	0	988	988	-8,174
92400	Chieveley Primary School	682,585	179	3,813.32	688,829	179	3,848.20	6,244	6,585	0	-6,585	-341
97700	St. John the Evangelist Infant & Nursery School	700,195	180	3,889.97	694,971	180	3,860.95	-5,224	-2,359	0	2,359	-2,866
94500	Mrs. Bland's Infant & Nursery School	711,441	181	3,930.61	710,341	181	3,924.54	-1,100	0	0	0	-1,100
95800	Mortimer St. Johns Church of England Infant School	693,546	182	3,810.69	686,176	182	3,770.20	-7,370	-11,392	0	11,392	4,023
95900	Cold Ash St. Mark's Church of England Primary School	699,503	189	3,701.08	701,407	189	3,711.15	1,903	-2,785	0	2,785	4,688
95700	St. Finian's Catholic Primary School	708,106	190	3,726.88	709,145	190	3,732.34	1,039	-28,684	-16,490	12,194	13,232
98700	The Willows Primary School	849,473	193	4,401.41	841,769	193	4,361.50	-7,704	-61,031	-37,828	23,202	15,499
94600	Pangbourne Primary School	743,620	196	3,793.98	754,308	196	3,848.51	10,688	8,327	0	-8,327	2,361
97800	St. Joseph's Catholic Primary School	767,510	197	3,895.99	755,925	197	3,837.19	-11,585	-42,335	-16,443	25,892	14,307
93400	Garland Junior School	777,605	198	3,927.30	780,826	198	3,943.56	3,221	-16,825	-5,107	11,718	14,939
93600	Hermitage Primary School	739,706	198	3,735.89	746,466	198	3,770.03	6,759	0	0	0	6,759
94100	Kennet Valley Primary School	775,116	199	3,895.06	778,909	199	3,914.12	3,792	0	0	0	3,792
93900	John Rankin Infant & Nursery School	756,564	201	3,764.00	758,152	201	3,771.90	1,588	-18,230	-5,329	12,901	14,489
92000	Calcot Infant School & Nursery	837,977	208	4,028.74	835,118	208	4,014.99	-2,859	-34,649	-15,862	18,786	15,928
92500	Downsway Primary School	777,988	209	3,722.43	778,855	209	3,726.58	866	0	0	0	866
95000	Robert Sandilands Primary School & Nursery	842,601	212	3,974.53	835,285	212	3,940.02	-7,316	0	0	0	-7,316
92100	Calcot Junior School	855,436	216	3,960.35	846,137	216	3,917.30	-9,299	-80,322	-55,814	24,508	15,209
96600	Theale Church of England Primary School	809,967	218	3,715.44	813,414	218	3,731.26	3,447	0	0	0	3,447
94000	John Rankin Junior School	829,593	225	3,687.08	842,356	225	3,743.80	12,763	-19,461	-16,065	3,396	16,159
96900	Westwood Farm Junior School	827,056	225	3,675.80	833,929	225	3,706.35	6,873	-6,893	0	6,893	13,766
97500	Mortimer St. Mary's Church of England Junior School	819,886	230	3,564.72	827,856	230	3,599.38	7,970	0	0	0	7,970
94800	Parsons Down Junior School	941,147	254	3,705.30	956,530	254	3,765.87	15,383	-9,312	-5,843	3,469	18,852
94700	Parsons Down Infant School	941,814	256	3,678.96	940,152	256	3,672.47	-1,661	7,414	0	-7,414	-9,075
96200	St. Nicolas Church of England Junior School	941,651	256	3,678.32	951,497	256	3,716.78	9,846	-22,760	-13,720	9,040	18,886
95300	Speenhamland Primary School	1,005,265	266	3,779.19	995,388	266	3,742.06	-9,877	0	0	0	-9,877
99400	The Wincombe School	1,069,060	269	3,974.20	1,069,219	269	3,974.79	159	80,012	64,766	-15,246	-15,087
94400	Long Lane Primary School	974,082	274	3,555.04	977,593	274	3,567.86	3,512	-13,302	0	13,302	16,814
95400	Springfield Primary School	1,013,335	286	3,543.13	1,011,602	286	3,537.07	-1,733	21,066	9,389	-11,677	-13,410
97000	Whitelands Park Primary School	1,215,945	326	3,729.89	1,220,589	326	3,744.14	4,644	-34,915	-14,864	20,052	24,696
96100	St. Pauls Catholic Primary School	1,153,236	327	3,526.71	1,150,471	327	3,518.26	-2,765	-28,753	-2,102	26,651	23,886
95500	Spurcroft Primary School	1,229,116	348	3,531.94	1,251,939	348	3,597.53	22,823	0	0	0	22,823
99700	Thatcham Park Church of England Primary School	1,278,112	353	3,620.71	1,287,377	353	3,646.96	9,266	7,763	0	-7,763	1,503
93700	Hungerford Primary School	1,404,414	402	3,493.57	1,417,347	402	3,525.74	12,933	8,723	0	-8,723	4,210
91200	Birch Copse Primary School	1,382,009	412	3,354.39	1,387,450	412	3,367.60	5,441	34,358	9,744	-24,614	-19,173
93000	Falkland Primary School	1,410,637	427	3,303.60	1,417,508	427	3,319.69	6,870	79,312	52,180	-27,133	-20,263
93200	Francis Baily Primary School	1,756,146	522	3,364.26	1,762,564	522	3,376.56	6,418	151,971	119,170	-32,802	-26,384
99000	John O'Gaunt Community Technology College	1,983,791	378	5,248.12	2,119,743	378	5,607.78	135,952	245,853	80,876	-164,977	-29,025
99900	Trinity School & Performing Arts College	3,681,711	694	5,305.06	3,647,231	694	5,255.38	-34,479	-85,793	0	85,793	51,314
99600	The Willink School	4,054,452	836	4,849.82	4,051,512	836	4,846.31	-2,940	0	0	0	-2,940
99300	Park House School	4,123,164	837	4,926.12	4,161,873	837	4,972.37	38,709	55,369	0	-55,369	-16,660
98900	Denefield School	4,338,466	842	5,152.57	4,250,228	842	5,047.78	-88,238	-191,200	-6,941	184,259	96,022
98800	The Downs School	4,224,419	896	4,714.75	4,233,865	896	4,725.30	9,446	90,775	18,693	-72,082	-62,635
99500	Theale Green Community School	5,130,132	1,034	4,961.44	5,129,731	1,034	4,961.06	-401	0	0	0	-401
99800	St. Bartholomew's School	5,901,960	1,250	4,721.57	5,917,763	1,250	4,734.21	15,803	0	0	0	15,803
99200	Little Heath School	6,155,763	1,300	4,735.20	6,183,221	1,300	4,756.32	27,458	0	0	0	27,458
99100	Kennet School	6,745,671	1,396	4,832.14	6,750,025	1,396	4,835.26	4,354	56,847	0	-56,847	-52,493
	PRIMARY TOTAL	47,356,514	12,286	3,855	47,463,894	12,286	3,863	107,379	220,648	247,936	27,288	134,667
	SECONDARY TOTAL	46,339,528	9,463	4,897	46,445,191	9,463	4,908	105,664	171,851	92,628	-79,223	26,441
	TOTAL ALL SCHOOLS	93,696,042	21,749		93,909,085	21,749		213,043	392,499	340,564	-51,935	161,108

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West Berkshire Schools' Forum	
Title of Report:	De-delegations 2014-15
Date of Meeting:	7th October 2013
Contact Officer(s)	Ian Pearson & Shannon Coleman-Slaughter
For Decision	

1. Introduction

1.1 In financial year 2013-14 schools received funding for newly delegated central services. For some services (where offered by the local authority), maintained primary and secondary schools can collectively (reviewed annually), opt for the service to be de-delegated. Where the decision is taken to de – delegate a service the funding for that service continues to be held centrally by the Local Authority (i.e. retained) for the benefit of all maintained primary and secondary schools. Individual schools cannot choose to opt in or out of the service. Academies may be given the option to buy into the service, as can Nursery and Special schools and Pupil Referral Units. The relevant Schools' Forum representatives for each phase will vote on whether each service is to be de-delegated or not

1.2 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
Includes support for class teachers for individual pupils or groups, and training.
- b) Ethnic Minority Support
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.
- d) Contingency for schools in financial difficulty
The provision of financial support to schools over and above their formula funding.

2. The Proposal

2.1 The current view (as expressed at SF on 15th July 2013) is as follows:

Service	Primary	Secondary
Behavioural Support	Yes	Yes
Ethnic Minority Support	Yes	Yes
Trade Union Local Representation	Yes	Yes
Contingency for schools in financial difficulty	Yes	No

2.2 No further views have been expressed either as a response to the School Formula consultation or by schools contacting their School Forum representative.

Action: The relevant Schools' Forum Members to take a final vote on whether each service is to be de-delegated for 2014/15.

Appendices

Appendix A – provides an indication of the likely charges – the unit charges per pupil and the total per school based on the data from the October 2012 census (final charges will be based on the October 2013 census data).

Proposed De-delegations 2014/15

Cost Centre	School	De-Delegations per School from April 2014						
		Data		Behaviour Support	Ethnic Minority Support	Trade Union Representation	Contingency Financial diff	TOTAL
		Pupil No's Oct-12	EAL Pupils	Pupil No's	EAL Pupils	Pupil no's	Pupil No's	
				£14.04	£426.18	£2.06	£9.53	
				£3.62	£349.80	£3.50	£30.66	
	Primary Schools							
91000	Aldermaston Church of England Primary School	169	8	2,373	3,550	348	1,611	7,882
91100	Basildon Church of England Primary School	134	0	1,882	0	276	1,277	3,435
91300	Beedon Church of England Controlled Primary School	39	0	548	0	80	372	1,000
91400	Beenham Primary School	87	1	1,222	545	179	829	2,775
91200	Birch Copse Primary School	412	4	5,786	1,509	849	3,926	12,070
91500	Bradfield Church of England Primary School	175	0	2,457	0	361	1,668	4,486
91600	Brightwalton Church of England Aided Primary School	100	0	1,404	0	206	953	2,563
91700	Brimpton Church of England Primary School	37	0	520	0	76	353	948
91800	Bucklebury Church of England Primary School	125	1	1,755	498	258	1,191	3,702
91900	Burghfield St. Mary's Church of England Primary School	172	1	2,415	513	354	1,639	4,921
92000	Calcot Infant School & Nursery	208	22	2,921	9,546	428	1,982	14,878
92100	Calcot Junior School	216	5	3,033	2,131	445	2,058	7,668
95600	Chaddleworth St. Andrew's Church of England Primary Sc	31	0	435	0	64	295	795
92400	Chieveley Primary School	179	4	2,514	1,546	369	1,706	6,135
95900	Cold Ash St. Mark's Church of England Primary School	189	1	2,654	494	389	1,801	5,339
92200	Compton Church of England Primary School	130	1	1,826	513	268	1,239	3,845
92300	Curridge Primary School	106	1	1,489	496	218	1,010	3,213
92500	Downsway Primary School	209	2	2,935	995	431	1,992	6,352
92800	Enborne Church of England Primary School	60	1	843	511	124	572	2,049
92900	Englefield Church of England Primary School	107	1	1,503	512	220	1,020	3,255
93000	Falkland Primary School	427	8	5,996	3,471	880	4,069	14,416
93200	Francis Baily Primary School	522	12	7,330	5,045	1,075	4,975	18,425
93400	Garland Junior School	198	4	2,780	1,705	408	1,887	6,780
93500	Hampstead Norreys Church of England Primary School	104	1	1,460	492	214	991	3,158
93600	Hermitage Primary School	198	1	2,780	499	408	1,887	5,575
93700	Hungerford Primary School	402	5	5,645	2,077	828	3,831	12,381
92700	The Ilsleys' Primary School	62	0	871	0	128	591	1,589
93800	Inkpen Primary School	64	0	899	0	132	610	1,640
93900	John Rankin Infant & Nursery School	201	19	2,823	8,123	414	1,916	13,275
94000	John Rankin Junior School	225	2	3,160	856	464	2,144	6,624
94100	Kennet Valley Primary School	199	21	2,794	8,980	410	1,896	14,081
94200	Kimbury St. Mary's Church of England Primary School	164	1	2,303	522	338	1,563	4,725
94300	Lambourn Church of England Primary School	169	10	2,373	4,116	348	1,611	8,448
94400	Long Lane Primary School	274	10	3,848	4,307	564	2,611	11,331
95800	Mortimer St. Johns Church of England Infant School	182	9	2,556	3,878	375	1,734	8,543
97500	Mortimer St. Mary's Church of England Junior School	230	1	3,230	426	474	2,192	6,322
94500	Mrs. Bland's Infant & Nursery School	181	6	2,542	2,593	373	1,725	7,232
94600	Pangbourne Primary School	196	1	2,752	500	404	1,868	5,524
94700	Parsons Down Infant School	256	22	3,595	9,429	527	2,440	15,990
94800	Parsons Down Junior School	254	7	3,567	2,983	523	2,421	9,494
94900	Purley Church of England Infants School	58	5	814	1,951	119	553	3,438
95000	Robert Sandilands Primary School & Nursery	212	14	2,977	5,957	437	2,020	11,391
95100	Shaw-cum-Donnington Church of England Primary School	81	1	1,137	515	167	772	2,591
95200	Shefford Church of England Primary School	22	1	309	469	45	210	1,033
95300	Speenhamland Primary School	266	22	3,735	9,244	548	2,535	16,062
95400	Springfield Primary School	286	5	4,016	1,998	589	2,726	9,329
95500	Spurcroft Primary School	348	13	4,887	5,704	717	3,316	14,624
95700	St. Finian's Catholic Primary School	190	0	2,668	0	391	1,811	4,870
97700	St. John the Evangelist Infant & Nursery School	180	17	2,528	7,032	371	1,715	11,646
97800	St. Joseph's Catholic Primary School	197	22	2,766	9,495	406	1,877	14,545
96200	St. Nicolas Church of England Junior School	256	4	3,595	1,705	527	2,440	8,267
96100	St. Pauls Catholic Primary School	327	52	4,592	22,360	674	3,116	30,742
96300	Stockcross Church of England Primary School	107	1	1,503	512	220	1,020	3,255
96400	Streatley Church of England Voluntary Controlled Primary	94	0	1,320	0	194	896	2,409
96500	Sulhamstead and Ufton Nerve Church of England Volunta	109	1	1,531	499	225	1,039	3,293
99700	Thatcham Park Church of England Primary School	353	6	4,957	2,567	727	3,364	11,616
96600	Theale Church of England Primary School	218	7	3,061	3,080	449	2,078	8,668
96700	Welford and Wickham Church of England Primary School	86	1	1,208	495	177	820	2,700
96800	Westwood Farm Infant School	176	11	2,472	4,526	363	1,677	9,038
96900	Westwood Farm Junior School	225	4	3,160	1,668	464	2,144	7,435
97000	Whitelands Park Primary School	326	10	4,578	4,071	672	3,107	12,428
98700	The Willows Primary School	193	20	2,710	8,546	398	1,839	13,493
99400	The Winchcombe School	269	30	3,777	12,978	554	2,564	19,873
97300	Woolhampton Church of England Primary School	89	0	1,250	0	183	848	2,281
97400	Yattendon Church of England Primary School	78	0	1,095	0	161	743	1,999
	Secondary Schools							
98800	The Downs School	896	2	3,247	700	3,136	27,471	34,554
99000	John O'Gaunt Community Technology College	378	1	1,370	350	1,323	11,589	14,632
99200	Little Heath School	1,300	7	4,710	2,450	4,550	39,858	51,569
99600	The Willink School	836	2	3,029	700	2,926	25,632	32,287
	Academies (not part of dedelegation)							
98900	Denefield School	842	15	3,051	5,247	2,947	25,816	37,061
93100	Fir Tree Primary School & Nursery	147	14	2,064	5,791	303	1,401	9,559
99100	Kennet School	1,396	4	5,058	1,369	4,886	42,801	54,114
99300	Park House School	837	11	3,033	3,857	2,930	25,662	35,482
99800	St. Bartholomew's School	1,250	10	4,529	3,504	4,375	38,325	50,733
99500	Theale Green Community School	1,034	1	3,747	345	3,619	31,702	39,413
99900	Trinity School & Performing Arts College	694	13	2,515	4,707	2,429	21,278	30,929
	PRIMARY TOTAL	12,139	443	170,464	188,737	25,006	115,685	499,892
	SECONDARY TOTAL	3,410	12	12,356	4,199	11,935	104,551	133,041
	ACADEMY TOTAL	6,200	68	23,997	24,820	21,488	186,986	257,291
	TOTAL ALL SCHOOLS	21,749	523	206,816	217,757	58,430	407,221	890,224

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West Berkshire Schools' Forum	
Title of Report:	Retained Funding Proposals
Date of Meeting:	7th October 2013
Contact Officer(s)	Claire White & Ian Pearson
For Decision	

1. Introduction

1.1 Under the current school funding regulations, no in-year adjustments to funding allocations are permitted and all funding to schools has to be allocated through the approved formula. There are, however, two circumstances for which funding can be retained centrally before the formula is calculated:

- 1) A growth fund for the purpose of supporting growth in pre-16 pupil numbers to meet basic need, to support additional classes needed to meet infant class size regulation, and to meet the costs of new schools.
- 2) A falling rolls fund where a population bulge is expected in the future but where a good and necessary school or academy currently has surplus places and faces an unmanageable funding shortfall in the short term.

1.2 West Berkshire currently operates a growth fund, but more detailed guidelines have been produced by the DfE for 2014/15 which necessitates a revision of the current scheme. The falling rolls fund is a new optional fund for 2014/15.

1.3 Both funds must be used on the same basis for the benefit of both maintained schools and academies.

1.4 Any funds remaining at the end of the financial year must be added to the following year's DSG and reallocated to maintained schools and academies through the local formula.

1.5 Local authorities are required to produce criteria on which any growth funding or falling rolls fund is to be allocated. These should provide a transparent and consistent basis (with differences permitted between phases) for the allocation of the funding. The criteria should both set out the circumstances in which a payment could be made and provide a basis for calculating the sum to be paid.

1.6 Schools' Forum is required to agree the criteria and be consulted on the total sum to be top sliced from the DSG. The Schools Forum will receive regular updates on the use of the funding.

2. Growth Fund

2.1 Appendix A sets out each circumstance and the proposed criteria where a school may be allocated additional funding from the growth fund.

2.2 It is recommended that £250,000 be top sliced from the DSG to cover these circumstances in 2014/15.

3. Falling Rolls Fund

3.1 Appendix B sets out the proposed criteria where a school may be allocated additional funding from the falling rolls fund.

3.2 The DfE has restricted the use of this fund to population increases in 2-3 years in necessary schools which are classed by OFSTED as good or outstanding. It cannot be used to prop up unpopular or failing schools.

3.3 It is recommended that £120,000 be top sliced from the DSG for this fund in 2014/15.

Recommendation: Schools' Forum to agree the criteria and sums to be top sliced from the DSG for 2014/15

Appendices

Appendix A – Growth Fund Criteria

Appendix B – Falling Rolls Fund Criteria

Growth Fund Criteria (2014/15)

1 Background

- 1.1 Under 2013 and 2014 School Funding Reform, local authorities can set up a growth fund from the DSG in advance of allocating school budget shares. The purpose of the growth fund is to support maintained schools and Academies which are required to provide extra places in order to meet basic need within the authority, including pre-opening and reorganisation costs. It can also include funding schools where very limited pupil number growth requires an additional class as required by infant class size regulations.
- 1.2 The growth fund is ring-fenced so that it can only be used for the purpose of supporting growth in pre 16 pupil numbers to meet basic need. Any funds remaining at the end of the financial year must be added to the following year's DSG and reallocated to maintained schools and Academies through the local formula.
- 1.3 Local authorities are required to provide on a transparent and consistent basis the criteria on which any growth funding is to be allocated. The criteria should both set out the circumstances in which a payment could be made and provide a basis for calculating the sum to be paid.
- 1.4 The Schools' Forum is required to agree the criteria and the total sum to be top sliced from each phase, and will receive regular reports on the use of the funding.
- 1.5 The criteria and funding as agreed by the Schools' Forum at its meeting on 7th October 2013 is set out below.

2 Growth Fund Criteria

2.1 New School

Start-up costs are payable to a new school for pre-opening costs (such as Headteacher and other staffing and recruitment costs prior to opening), and initial equipping allowance *where the school is opening in response to basic need in the area*.

Funding will be actual cost of the Headteacher prior to the school opening for up to one full term, plus a fixed lump sum of £25,000

2.2 Extending Age Range

This is payable to a school which has extended its age range in agreement with the authority *in response to basic need in the area*. Funding is payable from the growth fund where the new pupil numbers have not been added to the school formula funding in agreement with the DfE (i.e. the deadline for such agreement was missed) or the new pupil numbers are greater than the number agreed with the DfE.

Funding will be total AWPU per additional pupil in the new class (pro rata for the remainder of the financial year) plus a fixed lump sum of £10,000 per new class for set up costs

2.3 Provision of an Extra Class

This is payable where a school has agreed with the authority to provide an extra class *in order to meet basic need in the area* (either as a bulge class or as an ongoing commitment).

Funding will be total AWPU per additional pupil in the new class up to a maximum of £50,000 per class (approx. 17 pupils in primary, 11 pupils in secondary) pro rata for the remainder of the financial year. £50,000 will pay for a full time teacher at MS3, a term time only Teaching Assistant, and approximately £9,000 for other costs.

2.4 Increase in Pupil Admission Number (PAN)

This is payable where a school has increased its admission number by 5 or more pupils in agreement with the authority, but this has not necessitated an additional class, or is not in response to basic need for a bulge class or general pupil number growth in the area.

Funding will be 50% of the AWPU per additional pupil up to a maximum of £25,000 (approx. 17 pupils in primary, 11 pupils in secondary) pro rata for the remainder of the financial year.

2.5 KS1 Classes (infant class size)

This is payable to a school with infant classes which is required to set up an additional class in the Autumn term as required by infant class size regulations, and the school cannot accommodate all its additional reception and Key Stage 1 pupils in classes of 30 or less i.e. the total number of pupils in the 3 year groups exceeds a multiple of 30. (see Appendix A for examples).

In order to qualify for the additional funding, the school must have set up an additional class and employed an additional teacher, and must not have exceeded its admission number unless requested to by the LA.

Funding will be a fixed sum of £40,000 for each new class (to pay for a mid grade TMS teacher plus a teaching assistant), pro rata for the remainder of the financial year.

Before setting up an additional class and employing an additional teacher, schools should be aware that this additional in-year payment is temporary one-off funding for the remainder of the financial year in order to meet the pupil's basic need until full per pupil funding is received the following April. Schools will be required to meet the costs of the additional class from their formula pupil funding and lump sum from the following financial year. Schools accessing the infant class size funding where pupil numbers are just 2 or 3 above the limit, should carefully consider the longer term financial implications of employing an additional teacher (11 additional pupils are needed to pay for a M3 teacher, or 9 additional pupils for a M1 teacher).

3 Funding to be Top sliced from DSG

3.1 The sum to be set aside in 2014/15 is as follows:

Estimated Requirement	Calculation	Total
New School (none expected 2014/15)		£0
Extending Age Range (none expected 2014/15)		£0
Additional Classes x 6	$£50,000 \times 6 \times 7/12$	£175,000
Increase in PAN – 10 pupils x £1,454	$£14,540 \times 7/12$	£8,480
Infant classes x 2	$£40,000 \times 2 \times 7/12$	£46,670
Contingency		£19,850
TOTAL DSG REQUIREMENT		£250,000

- 3.2 Funding requests from schools are to be submitted to Schools' Finance who will make payment following approval by the Head of Education if he is satisfied that the criteria are met. All approvals will be reported to Schools' Forum.
- 3.3 Any overspends in year will be met from a top slice of the following years DSG allocation. Any underspends will be carried forward and reallocated to all schools through the following years funding formula.

Annex A – Examples of Infant Class Size Additional In-Year Funding

Examples of Infant Class Size Additional In-Year Funding

Example 1

	October 2013 Census	October 2014 Census
Reception Pupil Numbers	23	31
Year 1 Pupil Numbers	20	25
Year 2 Pupil Numbers	22	20
Total Pupil Numbers	65	76
Number of Classes run by school	3	3

Although pupil numbers have increased by 11, and the reception class exceeds 30, under infant class size regulations the school is still only required to run 3 classes, therefore no additional in-year funding will be payable. Total pupil numbers would need to exceed 90 to trigger the requirement for a 4th class.

Example 2

	October 2013 Census	October 2014 Census
Reception Pupil Numbers	20	21
Year 1 Pupil Numbers	20	20
Year 2 Pupil Numbers	19	20
Total Pupil Numbers	59	61
Number of Classes run by school	3	3

Total pupil numbers have increased by 2 taking the total over 60 and requiring 3 classes. However the school is already running and funding 3 classes within their existing budget, so no additional in-year funding will be payable – their budget requirement for the year has not changed by the admission of these 2 pupils.

Example 3

	October 2013 Census	October 2014 Census
Reception Pupil Numbers	20	21
Year 1 Pupil Numbers	20	20
Year 2 Pupil Numbers	19	20
Total Pupil Numbers	59	61
Number of Classes run by school	2	3

Same pupil numbers as the above example, except the school were operating with 2 classes. The school is therefore eligible for additional in-year funding if they operate a third class. However if their budget with just 2 extra pupils would not sustain the cost of an additional teacher beyond the following April, then they would need to carefully consider the implications of accepting an additional pupil taking them over 60 (unless exceptions to the regulations apply, such as pupils with a statement of SEN naming the school or pupils moving into the area outside the normal admission round).

Example 4

	October 2013 Census	October 2014 Census
Reception Pupil Numbers	20	30
Year 1 Pupil Numbers	20	20
Year 2 Pupil Numbers	19	21
Total Pupil Numbers	59	71
Number of Classes run by school	2	3

The school were running and funding 2 classes before the September admissions took them over 60 pupils. Additional in-year funding would therefore be payable for the additional class, and the additional 12 pupils will generate enough funding to sustain the cost of the additional teacher from April 2015.

Falling Rolls Fund Criteria (2014/15)

1 Background

- 1.1 From 2014/15, local authorities may top slice the DSG in order to create a small fund to support good schools with falling rolls. This is for where a population bulge is expected in the future but where a good and necessary school or academy currently has surplus places and faces an unmanageable funding shortfall in the short term.
- 1.2 The falling rolls fund is ring-fenced. Any funds remaining at the end of the financial year must be added to the following year's DSG and reallocated to maintained schools and Academies through the local formula.
- 1.3 It is mandatory that the falling rolls fund is restricted to population increases expected in 2-3 years in necessary schools which are classed by OFSTED as good or outstanding.
- 1.4 Local authorities are required to provide on a transparent and consistent basis the criteria on which any falling rolls funding is to be allocated. The criteria should both set out the circumstances in which a payment could be made and provide a basis for calculating the sum to be paid.
- 1.5 The Schools' Forum is required to agree the criteria and the total sum to be top sliced from each phase, and will receive regular reports on the use of the funding.
- 1.6 The criteria and funding as agreed by the Schools' Forum at its meeting on 7th October 2013 is set out below.

2 Falling Rolls Criteria

- 2.1 School must have been judged good or outstanding at their last OFSTED inspection.
- 2.2 Surplus capacity exceeds 10% of the published total school capacity.
- 2.3 Local planning data shows a requirement for at least 50% of the surplus places within the next 3 years
- 2.4 Without additional funding, the school will need to reorganise (reduce the number of classes) and make redundancies in order to avoid going into deficit and contain spending within its formula budget allocation based on the current pupil numbers and the staffing structure that this supports. This will need to be visible in the school's forward budget plan.
- 2.5 Where a school meets the above criteria, funding will be provided equivalent to the staffing cost of continuing to run the additional class(s) at a fixed sum of £40,000 per class. This will be pro rata for the remainder of the financial year.

3 Funding to be Top sliced from DSG

3.1 The sum to be set aside in 2014/15 is as follows:

Number of schools that may possibly meet the criteria $3 \times £40,000 = £120,000$

3.2 Funding requests from schools are to be submitted to Schools' Finance who will make payment following approval by the Head of Education if he is satisfied that the criteria are met. All approvals will be reported to Schools' Forum.

3.3 Any overspends in year will be met from a top slice of the following years DSG allocation. Any underspends will be carried forward and reallocated to all schools through the following years funding formula.

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West Berkshire Schools' Forum	
Title of Report:	Additional SEN Funding Proposal
Date of Meeting:	7th October 2013
Contact Officer(s)	Claire White & Ian Pearson
For Decision	

1. Introduction

1.1 Local authorities can provide additional targeted support to schools from its high needs block where it would be unreasonable to expect the first £6,000 of additional support for all high needs pupils to be provided due to an exceptional number of such pupils on roll.

1.2 In 2013/14 West Berkshire made a payment to schools where the actual SEN formula funding received plus top ups was less than the actual cost of statements (recalculated once a term). The difference was paid plus an allowance for non stated pupils based on the size of the school.

1.3 For 2014/15 the DfE has stated that the additional funding paid to schools should be formulaic based on the number of high needs pupils in each school. The formula or criteria should be simple and transparent, and should be devised so that additional funds are targeted only to a minority of schools which have particular difficulties because of their disproportionate number of high needs pupils or their characteristics.

1.4 Heads Funding Group considered three options for consideration (each set out below). Each use 2013/14 funding data and the October 2012 census for pupil numbers. The final calculation would use the most up to date information.

1.5 All formula options target mostly the same schools as the current "actual" method. Heads Funding Group recommendation is to use Option 1.

2. Option 1

2.1 A payment to schools where the actual number of high needs pupils is significantly above the average.

2.2 Where the actual number of high needs pupils per school is above 2% primary (1 high needs pupil in every 50) or 4% secondary (1 high needs pupil in every

100), rounded up, each additional pupil will attract the first £6,000 as additional funding alongside the top up.

2.3 This is the simplest of the three options, and by calculating on whole pupil numbers it ensures that schools receive the full funding for all high needs pupils they have on roll *above the average number that can be expected* and for which they are unlikely to have been funded in full for through the formula. Although it is the method which least correlates with the current additional funding it is more transparent as it clearly states how many pupils it is assumed each school is funded for and what each school then receives for additional pupils over this.

3. Option 2

3.1 A payment to schools where the actual number of high needs pupils is significantly above the average.

3.2 The actual number of high needs pupils per school is expressed as a percentage of the total number of pupils. Where the percentage is greater than 0.75% above the average (2.35% primary, 3.09% secondary), the school receives a payment of £6,000 per percentage point above that.

3.3 Although more complex, this method funds on a sliding scale according to percentage points above the average, rather than in multiples of £6,000.

4. Option 3

4.1 A payment to schools where the total cost of their high needs pupils is above the average notional SEN budget allocation.

4.2 Of the total delegated budget allocation, 5% is the total notional SEN budget. If 1.5% is allowed for non-statemented pupils needs below £6k, this leaves 3.5% of the allocation for the first £6k of high needs pupils. For schools where the cost of the first £6k of its high needs pupils cannot be met from 3.5% of their total budget allocation, the difference is paid (if allowed by DfE rules) or a calculated amount.

4.3 Although simplistic and the closest correlation to current additional funding, it assumes an average level of low needs costs, and the funding for SEN per school is based on an average, which could result in schools receiving additional funding when they are already adequately funded through their SEN formula.

Recommendation: Schools' Forum to approve Option 1 as a means of funding schools with disproportionate SEN costs in 2014/15

Appendices

Appendix A – Additional SEN Funding Options per School compared to current method.

Additional Funding for Schools with Disproportional Large Numbers of High Needs Pupils (using April 2013 data)

Cost Centre	SCHOOL	2014/15 Option 1				2014/15 Option 2				2014/15 Option 3					2013/14 Funding				
		Total Pupil No.s	Pupil No.s Receiving Top Ups	No. of Pupils Formula Funded	No. Add'l Top Up Pupils	Total Pupil No.s	Pupil No.s Receiving Top Ups	Percent	Above Average Percentage	Total Delegated Budget	3.50%	Total Cost of Statements (including top ups)	Less Top Ups	Total Cost to School Budget	Percent	Difference to Allocate	Funding Required to Make up Loss for statements	Funding Required to Make up minimum for Low Level AEN	TOTAL PAID
		£6,000				£6,000				£6,000									
	Primary			2.00%				2.35%											
	Secondary			4.00%				3.09%											
91000	Aldermaston Church of England Primary School	169	4	4	0	0	2.37%	0.02%	101	671,098	23,488	29,920	5,920	24,000	3.58%	512	0	0	0
91100	Basildon Church of England Primary School	134	5	3	2	12,000	3.73%	1.38%	8,288	536,766	18,787	40,190	16,190	24,000	4.47%	5,213	4,723	2,000	6,723
91300	Beedon Church of England Controlled Primary School	39	2	1	1	6,000	5.13%	2.78%	16,669	267,569	9,365	18,640	6,640	12,000	4.48%	2,635	3,763	1,000	4,763
91400	Beenham Primary School	87	0	2	0	0	0.00%	0.00%	0	401,135	14,040	0	0	0	0.00%	0	0	0	0
91200	Birch Copse Primary School	412	5	9	0	0	1.21%	0.00%	0	1,416,366	49,573	44,840	13,130	31,710	2.24%	0	0	0	0
91500	Bradfield Church of England Primary School	175	3	4	0	0	1.71%	0.00%	0	671,597	23,506	14,480	1,720	12,760	1.90%	0	0	0	0
91600	Brightwalton Church of England Aided Primary School	100	0	2	0	0	0.00%	0.00%	0	425,084	14,878	0	0	0	0.00%	0	0	0	0
91700	Brimpton Church of England Primary School	37	2	1	1	6,000	5.41%	3.06%	18,332	263,033	9,206	15,490	2,730	12,760	4.85%	3,554	9,546	1,000	10,546
91800	Bucklebury Church of England Primary School	125	3	3	0	0	2.40%	0.05%	300	504,105	17,644	25,300	6,540	18,760	3.72%	1,116	0	1,232	1,232
91900	Burghfield St. Mary's Church of England Primary School	172	3	4	0	0	1.74%	0.00%	0	643,890	22,536	22,200	4,200	18,000	2.80%	0	0	0	0
92000	Calcot Infant School & Nursery	208	0	5	0	0	0.00%	0.00%	0	803,329	28,117	0	0	0	0.00%	0	0	0	0
92100	Calcot Junior School	216	2	5	0	0	0.93%	0.00%	0	775,114	27,129	16,450	4,450	12,000	1.55%	0	0	0	0
95600	Chaddleworth St. Andrew's C of E Primary School	31	0	1	0	0	0.00%	0.00%	0	228,897	8,011	0	0	0	0.00%	0	0	0	0
92400	Chieveley Primary School	179	1	4	0	0	0.56%	0.00%	0	689,170	24,121	7,720	1,720	6,000	0.87%	0	0	0	0
95900	Cold Ash St. Mark's Church of England Primary School	189	4	4	0	0	2.12%	0.00%	0	696,718	24,385	23,160	3,440	19,720	2.83%	0	0	0	0
92200	Compton Church of England Primary School	130	2	3	0	0	1.54%	0.00%	0	547,719	19,170	17,490	5,490	12,000	2.19%	0	0	0	0
92300	Curridge Primary School	106	0	3	0	0	0.00%	0.00%	0	436,946	15,293	0	0	0	0.00%	0	0	0	0
92500	Downsway Primary School	209	7	5	2	12,000	3.35%	1.00%	5,996	777,988	27,230	43,440	6,680	36,760	4.73%	9,530	5,587	3,000	8,587
92800	Enborne Church of England Primary School	60	0	2	0	0	0.00%	0.00%	0	305,830	10,704	0	0	0	0.00%	0	0	0	0
92900	Englefield Church of England Primary School	107	1	3	0	0	0.93%	0.00%	0	449,994	15,750	6,760	0	6,760	1.50%	0	0	0	0
93000	Falkland Primary School	427	5	9	0	0	1.17%	0.00%	0	1,489,950	52,148	38,650	4,200	34,450	2.31%	0	0	0	0
93100	Fir Tree Primary School & Nursery	147	2	3	0	0	1.36%	0.00%	0	670,606	23,471	13,520	1,520	12,000	1.79%	0	0	0	0
93200	Francis Baily Primary School	522	9	11	0	0	1.72%	0.00%	0	1,908,117	66,784	69,140	20,380	48,760	2.56%	0	0	0	0
93400	Garland Junior School	198	6	4	2	12,000	3.03%	0.68%	4,082	760,779	26,627	39,780	4,960	34,820	4.58%	8,193	0	0	0
93500	Hampstead Norreys Church of England Primary School	104	3	3	0	0	2.88%	0.53%	3,208	456,730	15,986	23,290	760	22,530	4.93%	6,544	9,222	2,000	11,222
93600	Hermitage Primary School	198	4	4	0	0	2.02%	0.00%	0	739,706	25,890	24,250	6,250	18,000	2.43%	0	0	0	0
93700	Hungerford Primary School	402	6	9	0	0	1.49%	0.00%	0	1,413,137	49,460	54,500	18,500	36,000	2.55%	0	0	0	0
92700	The Ilsleys' Primary School	62	1	2	0	0	1.61%	0.00%	0	323,072	11,308	7,720	1,720	6,000	1.86%	0	0	0	0
93800	Inkpen Primary School	64	0	2	0	0	0.00%	0.00%	0	336,041	11,761	0	0	0	0.00%	0	0	0	0
93900	John Rankin Infant & Nursery School	201	3	5	0	0	1.49%	0.00%	0	738,334	25,842	25,300	1,720	23,580	3.19%	0	0	0	0
94000	John Rankin Junior School	225	2	5	0	0	0.89%	0.00%	0	810,132	28,355	18,540	6,540	12,000	1.48%	0	0	0	0
94100	Kennet Valley Primary School	199	3	4	0	0	1.51%	0.00%	0	775,116	27,129	22,200	4,200	18,000	2.32%	0	0	0	0
94200	Kintbury St. Mary's Church of England Primary School	164	8	4	4	24,000	4.88%	2.53%	15,168	691,313	24,196	67,130	15,360	51,770	7.49%	27,574	23,225	2,000	25,225
94300	Lambour Church of England Primary School	169	4	4	0	0	2.37%	0.02%	101	693,462	24,271	26,310	8,310	18,000	2.60%	0	0	0	0
94400	Long Lane Primary School	274	1	6	0	0	0.36%	0.00%	0	960,780	33,627	9,770	3,770	6,000	0.62%	0	0	0	0
95800	Mortimer St. Johns Church of England Infant School	182	5	4	1	6,000	2.75%	0.40%	2,384	682,154	23,875	33,020	9,020	24,000	3.52%	125	0	0	0
97500	Mortimer St. Mary's Church of England Junior School	230	5	5	0	0	2.17%	0.00%	0	819,886	28,696	37,690	7,690	30,000	3.66%	1,304	0	625	625
94500	Mrs. Bland's Infant & Nursery School	181	1	4	0	0	0.55%	0.00%	0	711,441	24,900	3,088	1,720	1,368	0.19%	0	0	0	0
94600	Pangbourne Primary School	196	6	4	2	12,000	3.06%	0.71%	4,267	751,947	26,318	59,460	16,700	42,760	5.69%	16,442	8,807	2,000	10,807
94700	Parsons Down Infant School	256	5	6	0	0	1.95%	0.00%	0	949,227	33,223	43,710	13,710	30,000	3.16%	0	0	0	0
94800	Parsons Down Junior School	254	4	6	0	0	1.57%	0.00%	0	931,835	32,614	38,170	13,410	24,760	2.66%	0	0	0	0
94900	Purley Church of England Infants School	58	1	2	0	0	1.72%	0.00%	0	304,383	10,653	9,770	3,770	6,000	1.97%	0	0	0	0
95000	Robert Sandilands Primary School & Nursery	212	3	5	0	0	1.42%	0.00%	0	842,601	29,491	22,200	4,200	18,000	2.14%	0	0	0	0
95100	Shaw-cum-Donnington Church of England Primary School	81	1	2	0	0	1.23%	0.00%	0	442,463	15,486	9,770	1,720	8,050	1.82%	0	0	0	0
95200	Shefford Church of England Primary School	22	0	1	0	0	0.00%	0.00%	0	215,667	7,548	0	0	0	0.00%	0	0	0	0
95300	Speenhamland Primary School	266	6	6	0	0	2.26%	0.00%	0	1,005,265	35,184	60,820	24,820	36,000	3.58%	816	0	0	0
95400	Springfield Primary School	286	3	6	0	0	1.05%	0.00%	0	1,034,402	36,204	31,460	13,460	18,000	1.74%	0	0	0	0
95500	Spurcroft Primary School	348	3	7	0	0	0.86%	0.00%	0	1,229,116	43,019	15,440	1,720	13,720	1.12%	0	0	0	0
95700	St. Finian's Catholic Primary School	190	3	4	0	0	1.58%	0.00%	0	679,422	23,780	27,400	9,400	18,000	2.65%	0	0	0	0
97700	St. John the Evangelist Infant & Nursery School	180	0	4	0	0	0.00%	0.00%	0	697,837	24,424	0	0	0	0.00%	0	0	0	0
97800	St. Joseph's Catholic Primary School	197	3	4	0	0	1.52%	0.00%	0	725,175	25,381	15,440	3,440	12,000	1.65%	0	0	0	0
96200	St. Nicolas Church of England Junior School	256	4	6	0	0	1.56%	0.00%	0	918,891	32,161	43,280	19,280	24,000	2.61%	0	0	0	0
96100	St. Pauls Catholic Primary School	327	1	7	0	0	0.31%	0.00%	0	1,124,483	39,357	7,720	1,720	6,000	0.53%	0	0	0	0
96300	Stockcross Church of England Primary School	107	0	3	0	0	0.00%	0.00%	0	451,148	15,790	0	0	0	0.00%	0	0	0	0
96400	Streatley Church of England VC Primary School	94	1	2	0	0	1.06%	0.00%	0	409,982	14,349	0	0	0	0.00%	0	0	0	0
96500	Sulhamstead and Ufton Nerve C of E VA Primary School	109	3	3	0	0	2.75%	0.40%	2,414	453,616	15,877	22,200	4,200	18,000	3.97%	2,123	3,085	2,000	5,085
99700	Thatcham Park Church of England Primary School	353	5	8	0	0	1.42%	0.00%	0	1,285,874	45,006	37,640	7,640	30,000	2.33%	0	0	0	0
96600	Theale Church of England Primary School	218	2	5	0	0	0.92%	0.00%	0	809,967	28,349	6,760	2,480	4,280	0.53%	0	0	0	0
96700	Welford and Wickham Church of England Primary School	86	0	2	0	0	0.00%	0.00%	0	410,558	14,370	0	0	0	0.00%	0	0	0	0
96800	Westwood Farm Infant School	176	1	4	0	0	0.57%	0.00%	0	680,141	23,805	11,880							

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West Berkshire Schools' Forum	
Title of Report:	Funding of High Needs Students in FE Colleges
Date of Meeting:	7th October 2013
Contact Officer(s)	Jane Seymour
For Decision	

1. Introduction

- 1.1 Responsibility for funding students with SEN in FE Colleges sat with the Education Funding Agency until 2012-13 but transferred to Local Authorities with effect from 2013-14. Funding was put in to the Post 16 High Needs Block for this purpose but this was based on a formula and did not fully reflect need.
- 1.2 Funding for High Needs Students in FE Colleges is composed of Elements 1, 2 and 3. Element 1 (£4,000) is provided by the EFA and represents the general costs associated with the student's placement in college (similar to the Age Weighted Pupil Unit in mainstream schools). Element 2 (£6,000) is provided by the EFA (but is top sliced from the Local Authority's High Needs Block). Only those students who require funding over £10,000 will attract Element 3 or "top up" funding from the Local Authority. These will almost always be students who had a Statement of Educational Needs when they were in school, although there may be a small number of exceptions to this.
- 1.3 FE Colleges were funded up to July 2013 by the EFA, so in the current financial year the DSG will only bear a part year cost equivalent to two terms of funding, i.e. two thirds of the full year cost of each placement.
- 1.4 Historically, students with SEN who were funded in FE colleges when their statements lapsed at age 19 were usually funded for a maximum of 3 years ie. to the age of 22. However, there is now a legal duty to fund High Needs Students potentially up to the age of 25 if a case can be made that additional time in FE would enable the student to achieve their identified objectives such as accessing employment.

2. Demands on budget for High Needs Students in FE Colleges

- 2.1 It has not been possible to make an accurate estimate of the cost of HNS in FE colleges until now, as this depends on a number of factors at the start of an academic year such as whether existing students will continue on the same course, change to a different course or leave college and which new students will take up places on which courses in which colleges. Some of these decisions can be made well in advance and anticipated but others are made late in the academic year because of changes in students' preferences, students not meeting the entry criteria for courses etc. Top up fees levied for

students by different colleges have also been subject to negotiation and discussion over the course of the summer term.

- 2.2 Now that the academic year has started we have been able to make a more accurate estimate of costs than was previously possible, although this could still be subject to change if students fail to sustain courses or if late applications for entry to courses are received.
- 2.3 Most West Berkshire High Needs Students who are funded in FE colleges attend local FE colleges such as Newbury College, Reading College, Berkshire College of Agriculture, Sparsholt College and Berkshire College of Technology.
- 2.4 In some cases, where a student's needs are highly complex and cannot be met in a local college, placement in an Independent Specialist College (ISP) may be agreed.
- 2.5 The cost of HNS in 2013-14 is estimated as follows:

Type of placement	Number of HNS	Cost £
Independent Specialist Placements	10	489,162
Local FE Colleges	50	850,439
Total annual cost	60	1,339,601
Pro rata cost 1.9.13 to 31.3.14		893,067

3. 2013-14 Budget for High Needs Students

- 3.1 The current budget for High Needs Students in FE Colleges in cost centre 90580 is £183,750. The shortfall to meet costs in the current financial year is therefore £709,317.
- 3.2 Funding in the High Needs Block contingency will need to be vired to cost centre 90580 to meet this unavoidable cost.

4. Implications for 2014 – 15

- 4.1 Whilst the immediate issue to be addressed is the shortfall in the current financial year, it should also be noted that there will be a significant pressure on the High Needs Block for HNS in FE Colleges in future years.
- 4.2 The full year cost of the current cohort of students would be in the region of 1.34 million. There will obviously be changes in the student cohort in the 2014-15 financial year because of leavers and new joiners, but if we assume a similar number of students and a similar level of need, there will be a need for significantly higher budget provision for High Needs Students of the order of £1.34 million.
- 4.3 Officers have worked closely with the FE Colleges to ensure that costs for individual students can be justified and represent value for money, and will continue to do so.

4.4 West Berkshire currently has 10 students in Independent Specialist Colleges because their needs could not be met in local FE colleges. These placements are significantly more expensive than placements in local FE Colleges. The aim is to reduce the need for these placements by building local capacity in 19 to 25 provision. However, this process will take time and it should be anticipated that in the short to medium term we may continue to need a similar level of external placements. It should also be noted that from September 2014 parents will have a legal right of appeal to the SEN and Disability Tribunal in cases where a Local Authority refuses the FE college placement of the parents' choice, and if the appeal is upheld the Authority would be directed to fund the placement. These legal rights do not currently exist in respect of placements in FE colleges so this will potentially create an additional pressure.

Recommendation:

Schools' Forum to agree to a virement of funds totalling £709,320 from the High Needs Block contingency in to the budget for High Needs Students in FE Colleges to meet unavoidable costs in 2013-14.

Schools' Forum be aware of the need to take in to account pressures on the budget for High Needs Students in FE Colleges in 2014-15.

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West Berkshire Schools' Forum	
Title of Report:	DSG Monitoring 2013-14, Month 5
Date of Meeting:	7th October 2013
Contact Officer(s)	Ian Pearson, Shannon Coleman-Slaughter
For Discussion	

1. Background

1.1 The main source of funding for schools is the Dedicated Schools Grant (DSG). It is a ring fenced specific grant and can only be used on school/pupil activity.

1.2 The grant is calculated by multiplying a guaranteed unit of funding per pupil (set by the DfE) by the actual pupil numbers from the January census count (so January 2013 census for 2013/14 budget).

1.3 The use of the grant is split between:

- a. The Individual School's Budget – the ISB or delegated budget.
- b. The Centrally Retained School's Budget – the non delegated budget

1.4 The Local Authority uses a local formula to distribute the ISB to schools.

1.5 Centrally Retained Overspends, unless funded from outside the DSG, are carried forward and top sliced from the following year's DSG allocation. Underspends must be carried forward to support the school's budget in future years.

1.6 The Authority and Schools' Forum are responsible for ensuring that the DSG is deployed correctly, and monitoring of spend against the DSG needs to take place regularly to enable decision making on overspends/underspends and to inform future year budget requirements.

2. Monitoring Position as at Month 5 (31st August 2013)

2.1 The following is the position as at the end of August 2013. A further analysis per cost centre is shown in Appendix A:

	Total Budget £m	Actual Spend Forecast £m	Forecast Outturn Variance £m
ISB Delegated Budget	77.672	77.897	0.225
Centrally Retained Budget	15.052	15.381	0.328
Support Service Recharges	0.721	0.721	0
Total Expenditure	93.445	93.999	0.554
DSG Grant	-93.445	-93.999	-.0554
Net Budget	0	0	0

- 2.2 All delegated (ISB) money is transferred to schools, and any overspends or underspends on individual schools budgets are carried forward on the schools budget.
- 2.3 The Centrally Retained Budget is currently showing a net over spend of £0.3m and the ISB an overspend of £0.2m. The ISB overspend will be corrected through an adjustment against Two Year Old Funding in the Centrally Retained budget which is currently showing an under spend of £0.2m.
- 2.4 The Centrally Retained Budget is under pressure from the Top Up cost centres. The most significant area of forecast pressure is against Further Education Top Ups due to higher than anticipated demand. It has been proposed in another report on this agenda that funds are vired from the Special Needs Contingency budgets into the Further Education Top Ups Budget.

Appendices

Appendix A – DSG 2013/14 Budget Monitoring Report

Appendix A

Dedicated School's Grant (DSG) 2013-14 Budget Monitoring

Budget manager	Cost Centre	Description	Budget for Year	Actual	Variance	Comments
Ian Pearson	90010	Nursery Schools	827,960	827,960	0	
Ian Pearson	90020	Primary Schools	46,397,350	46,397,350	0	
Ian Pearson	90025	Secondary Schools	21,826,160	21,826,160	0	
Ian Pearson	90540	Special Schools	3,530,000	3,530,000	0	
Maria Shepherd	90036	Early Years Funding for PVI	3,961,810	4,187,284	225,474	Mis coding to be corrected, cost centre 90018
Ian Pearson	90037	Early Yrs Funding Maintained Sector	1,128,610	1,128,610	0	
Ian Pearson	90038	Pupil Premium	0	0	0	
DELEGATED ISB TOTAL			77,671,890	77,897,364	225,474	
Maria Shepherd	90017	Early Years Support Team	109,010	114,600	5,590	Salary pressure
Maria Shepherd	90018	Expenditure on 2 year olds	1,033,550	808,076	-225,474	Will be offset by correction against 90036
Ian Pearson	90019	DSG Servicing of Schools' Forum	95,320	84,320	-11,000	Savings on supplies and services budgets
Ian Pearson	90026	Academy SEN Payments	368,360	368,360	0	
Adrian Slaughter	90028	Schools Carbon Reduction Commitment	105,000	100,439	-4,561	Reduced Carbon Reduction Commitment allowances
Ian Pearson	90112	Special Costs Primary	25,010	25,010	0	
Ian Pearson	90117	Special Costs Secondary	15,550	15,550	0	
Ian Pearson	90230	Schools in Financial Difficulty	115,680	115,680	0	
Jane Seymour	90231	Non Delegated Contingency	0	0	0	Funding now delegated to schools
Ian Pearson	90235	School Delegated Contingency	100,000	100,000	0	
Ian Pearson	90236	Managed Moves/Exclusions Contingency	0	0	0	
Jane Seymour	90237	Special Needs Delegated Contingency	1,374,910	779,510	-595,400	
Rhian Ireland	90238	Sen Pre School Childrn	38,220	50,220	12,000	Based on estimated demand for Autumn and Spring Terms. Lower demand for services than anticipated.
Anne Cooper	90240	Applied Behaviour Analysis	136,580	106,000	-30,580	
Maxine Slade	90255	Virtual School Service	171,410	171,410	0	
Rhian Ireland	90280	Spec Needs Spprt Team	311,370	315,370	4,000	Pressure on salary budgets

Jane Seymour	90290	Sensory Impairment	227,420	227,420	0	
Cathy Burnham	90315	Home Tuition	148,270	218,270	70,000	Pressure due to need to provide full time support to children.
Cathy Burnham	90320	Pupil Referral Units	672,000	672,000	0	
Cathy Burnham	90341	Ed Psychology - DSG	0	0	0	
Anne Cooper	90548	Non WBC Special Schools - Top Up Funding	520,000	447,000	-73,000	Based on current demand levels
Cathy Burnham	90349	Behaviour Support - DSG	150,110	150,110	0	
Ian Pearson	90515	Willink Sports Centre	0	3,800	3,800	Residual costs for Energy prior to 31st march 2013 post recharges.
Anne Cooper	90539	Special Schools - Top Up Funding	2,420,120	2,496,083	75,963	Based on current demand levels
Rhian Ireland	90555	LAL Funding	134,600	134,600	0	
Anne Cooper	90565	Equipment For SEN Pupils	38,470	38,470	0	
Anne Cooper	90575	Non LEA Special School (OofA)	1,655,270	1,655,270	0	
Jane Seymour	90577	SEN Commissioned Provision	448,890	448,890	0	
Anne Cooper	90579	Independent Special School Place & Top Up	832,070	932,000	99,930	Based on current demand levels
Anne Cooper	90580	Further Education Colleges Top Up	183,750	1,166,490	982,740	Based on current demand levels
Cathy Burnham	90582	PRU Outreach	76,880	76,880	0	
Caroline Corcoran	90583	CLA/MPA Licences	47,000	47,000	0	
Anne Cooper	90584	Resourced Units - Place Funding (70)	680,000	680,000	0	
Jane Seymour	90585	HN Outreach Special Schools	105,650	105,650	0	
Anne Cooper	90605	Recoupment Special Schools	0	0	0	
Anne Cooper	90610	Hospital Tuition	0	0	0	
Anne Cooper	90615	Recoupment Resourced Units	0	0	0	
Anne Cooper	90617	Resourced Units top up Funding maintained	420,060	430,705	10,645	Based on current demand levels
Anne Cooper	90618	Non WBC Resourced Units - Top Up Funding	60,000	20,000	-40,000	Based on current demand levels
Anne Cooper	90620	Recoupment Mainstream Schools	0	0	0	
Anne Cooper	90621	Mainstream - Top Up Funding maintained	512,830	543,522	30,692	Based on current demand levels
Anne Cooper	90622	Mainstream - Top Up Funding Academies	362,740	362,740	0	
Anne Cooper	90623	Recoupment PRU's	0	0	0	
Anne Cooper	90624	Non WBC Mainstream - Top Up Funding	48,210	48,210	0	
Cathy Burnham	90625	Pupil Referral Units - Top Up Funding	812,610	842,610	30,000	Based on current demand levels
Melanie Ellis	90711	Schools Finance	46,580	46,580	0	
Jane Seymour	90722	Special Needs Assess - DSG	0	0	0	
Ian Pearson	90736	Pupil & Student Services - DSG	0	0	0	
Caroline Corcoran	90742	Place Planning, Transport and Finance DSG	0	0	0	

Caroline Corcoran	90743	Admissions	176,020	176,020	0	
Rhian Ireland	90830	ASD Teachers	118,360	118,360	0	
Sheila Loy	90903	Peer Monitoring Funding	0	0	0	
Maxine Slade	90917	Children in Public Care	0	0	0	
Rhian Ireland	90957	Early Intervention	45,510	33,510	-12,000	Supplies and services savings
Cathy Burnham	90961	Vulnerable Children	80,000	80,000	0	
Rhian Ireland	90965	SEN Inclusion Programme	28,780	23,780	-5,000	Supplies and services savings
Avril Allenby	90994	Primary Strategy 1:1 Tuition	0	0	0	
CENTRALLY RETAINED TOTAL			15,052,170	15,380,515	328,345	
SUPPORT SERVICE RECHARGES			720,890	720,890	0	
TOTAL DSG EXPENDITURE			93,444,950	93,998,769	553,819	
Ian Pearson	90030	DSG Grant Account	-93,444,950	-93,998,769	-553,819	
NET DSG EXPENDITURE			0	0	0	

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West Berkshire Schools' Forum	
Title of Report:	Benchmarking Data 2013/14
Date of Meeting:	7th October 2013
Contact Officer(s)	Carolynn Loosen
For Information	

1. The Department for Education has recently published benchmarking information on school funding.
2. The Appendices to this report provide the key funding data for West Berkshire Council compared to our statistical neighbours and to all other unitary authorities.
3. Compared to our statistical neighbours, West Berkshire funds schools at or above the median, though this is also reflected in the unit of funding received.
4. Our schools block unit of funding is below average compared to unitary authorities, though individual school budgets are on the median.

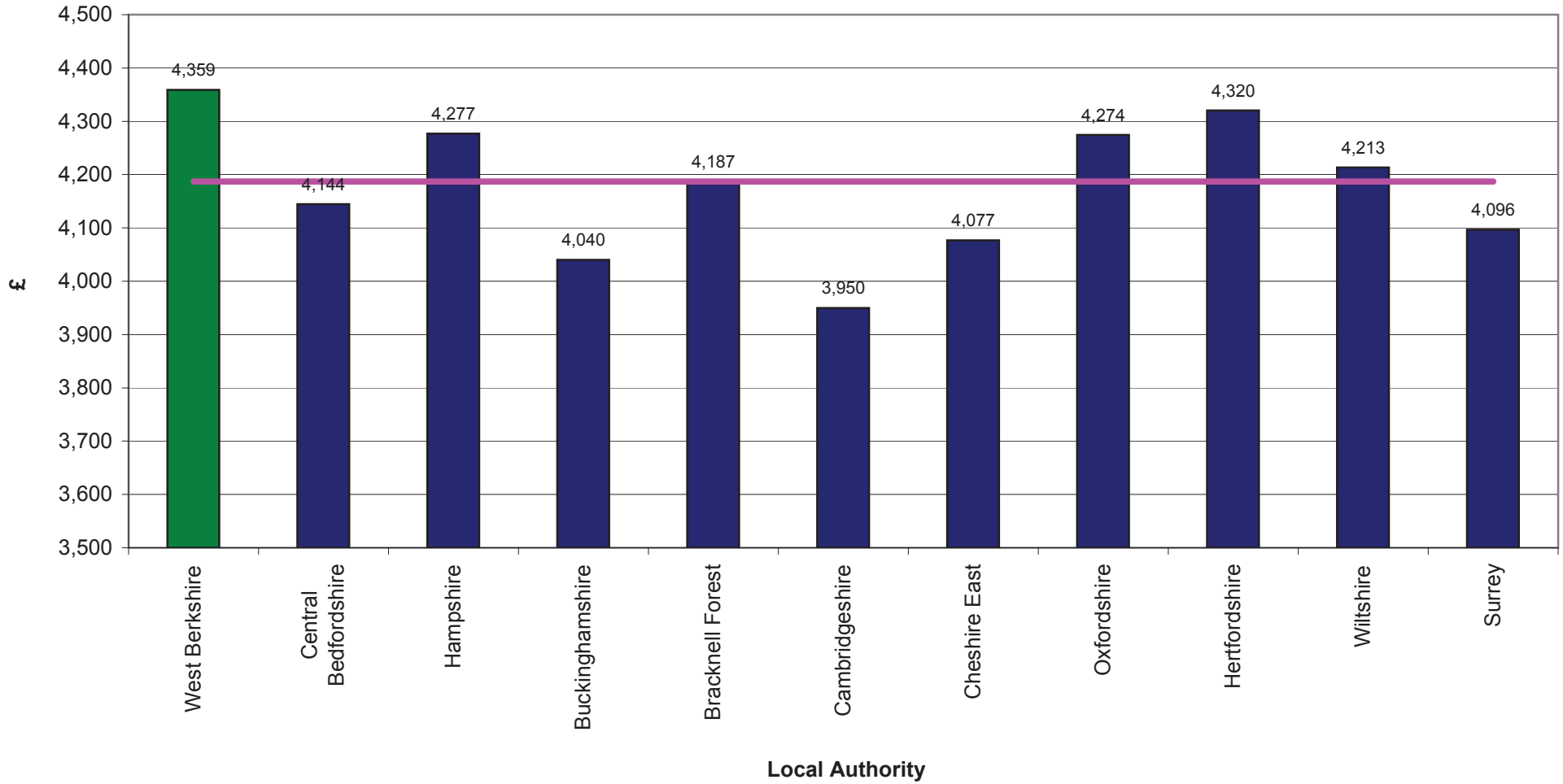
Appendices

- Appendix A – DSG Schools Block Unit of Funding per Pupil (statistical neighbours)
- Appendix B – Individual School Budget per Pupil (statistical neighbours)
- Appendix C – Total School Budget per Pupil (statistical neighbours)
- Appendix D – High Needs Budget (statistical neighbours)
- Appendix E – DSG Schools Block Unit of Funding per Pupil (unitary authorities)
- Appendix F – Individual School Budgets per Pupil (unitary authorities)
- Appendix G – Total School Budgets per Pupil (unitary authorities)
- Appendix H – High Needs Budget (unitary authorities)

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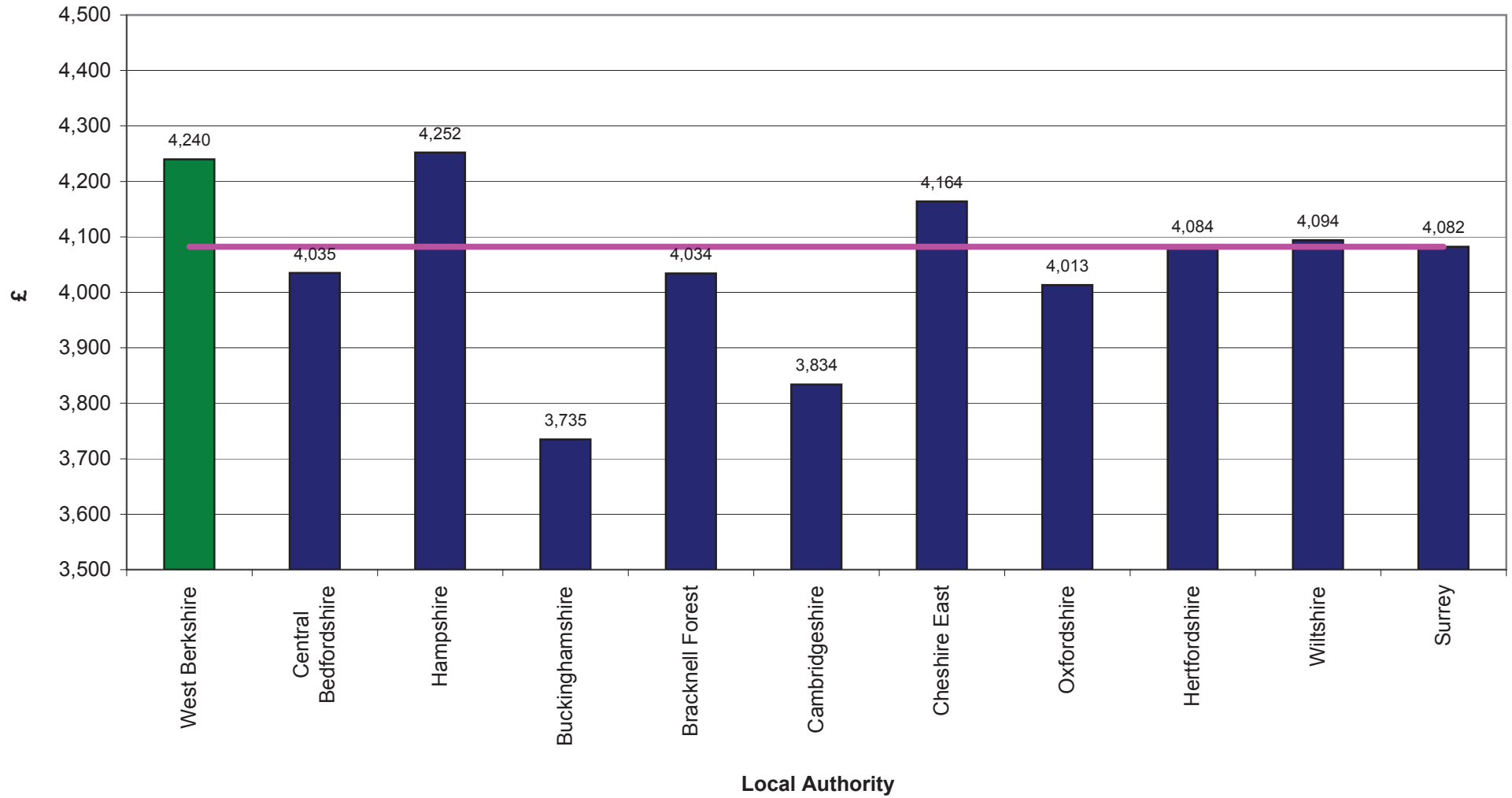
Appendix A
Local Authority Statistical Neighbours
2013-14 DSG Schools Block Unit of Funding
£ per Pupil

■ Statistical Neighbours
— Median £4,187



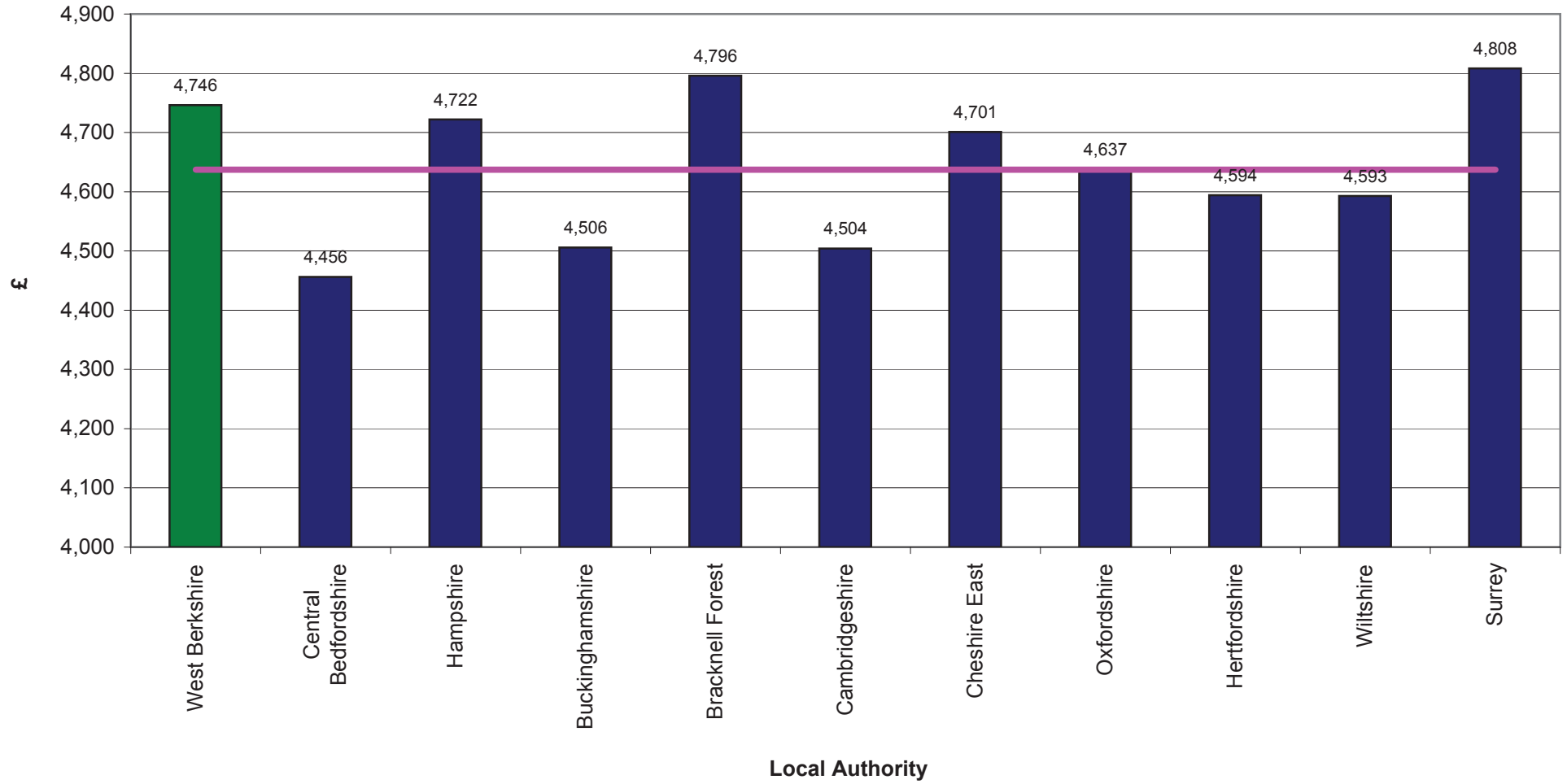
Appendix B
Local Authority Statistical Neighbours
2013-14 Individual School Budgets (before academy recoupment)
£ per Pupil

■ Statistical Neighbours
— Median £4,082

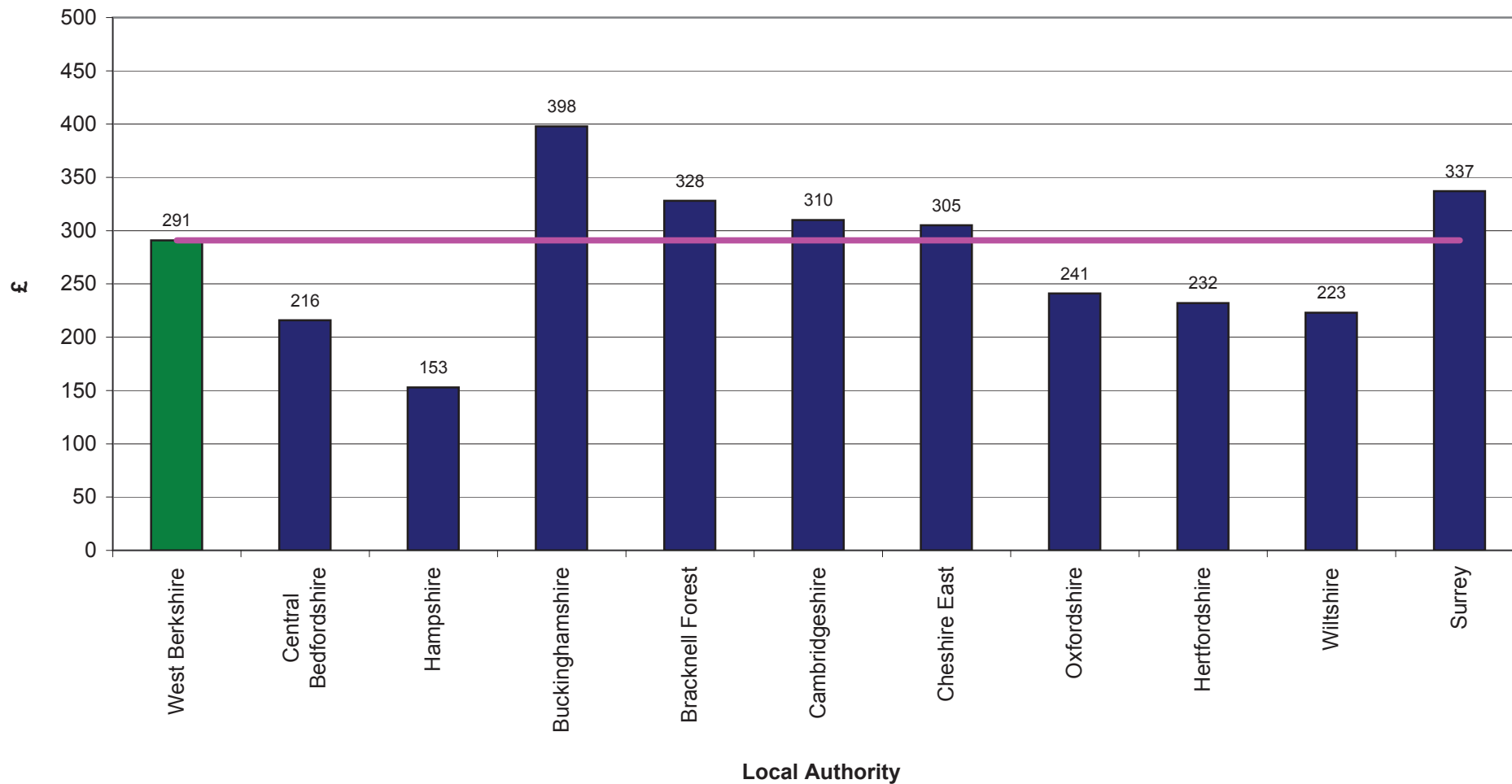


Appendix C
Local Authority Statistical Neighbours
2013-14 Total School Budgets (before academy recoupment)
£ per Pupil

■ Statistical Neighbours
— Median £4,637

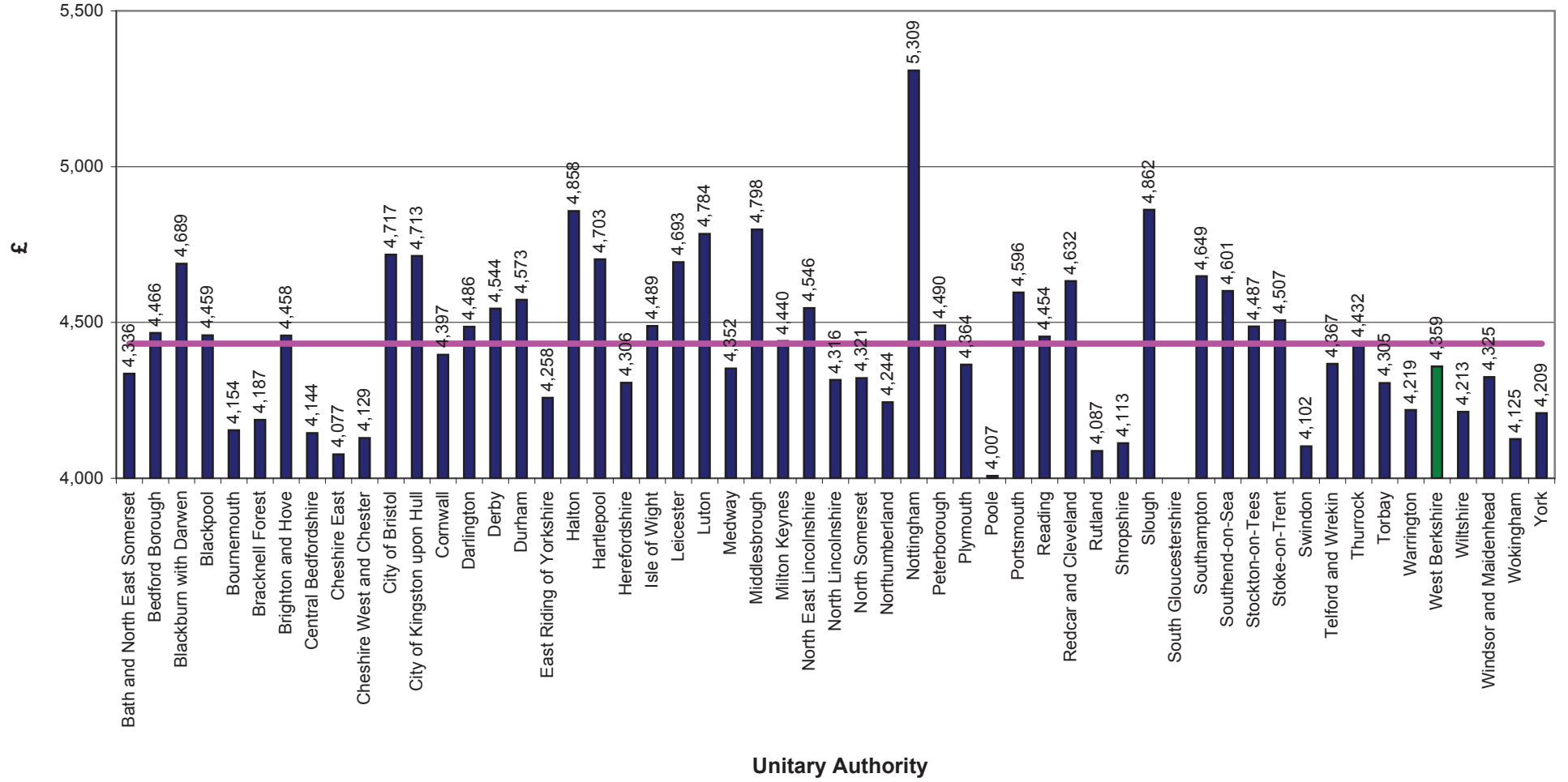


Appendix D
Local Authority Statistical Neighbours
2013-14 High Needs Budget
£ per Pupil



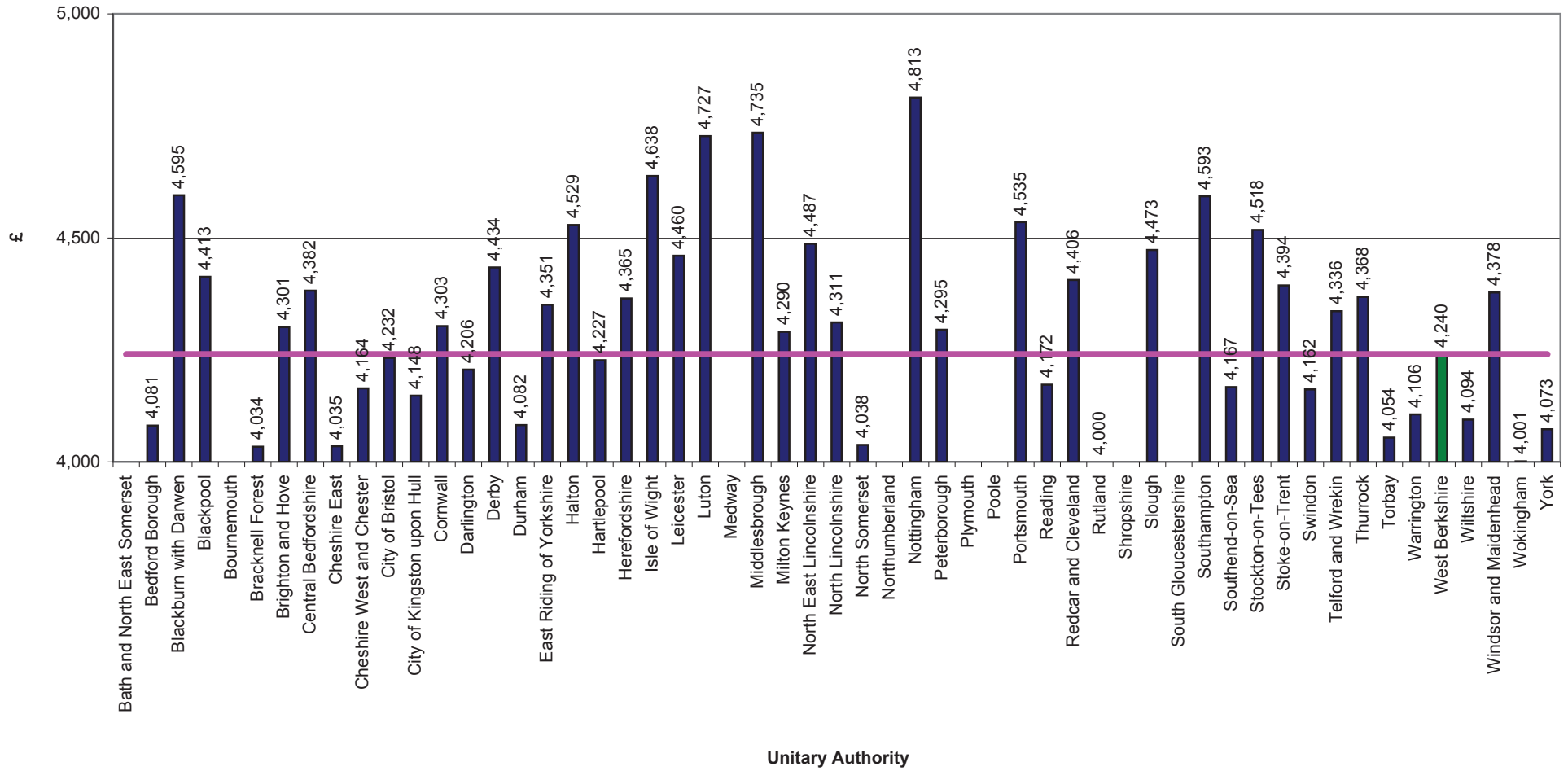
Appendix E
Unitary Authorities
2013-14 DSG Schools Block Unit of Funding
£ per Pupil

■ Unitary Authority
 — Median £4,432



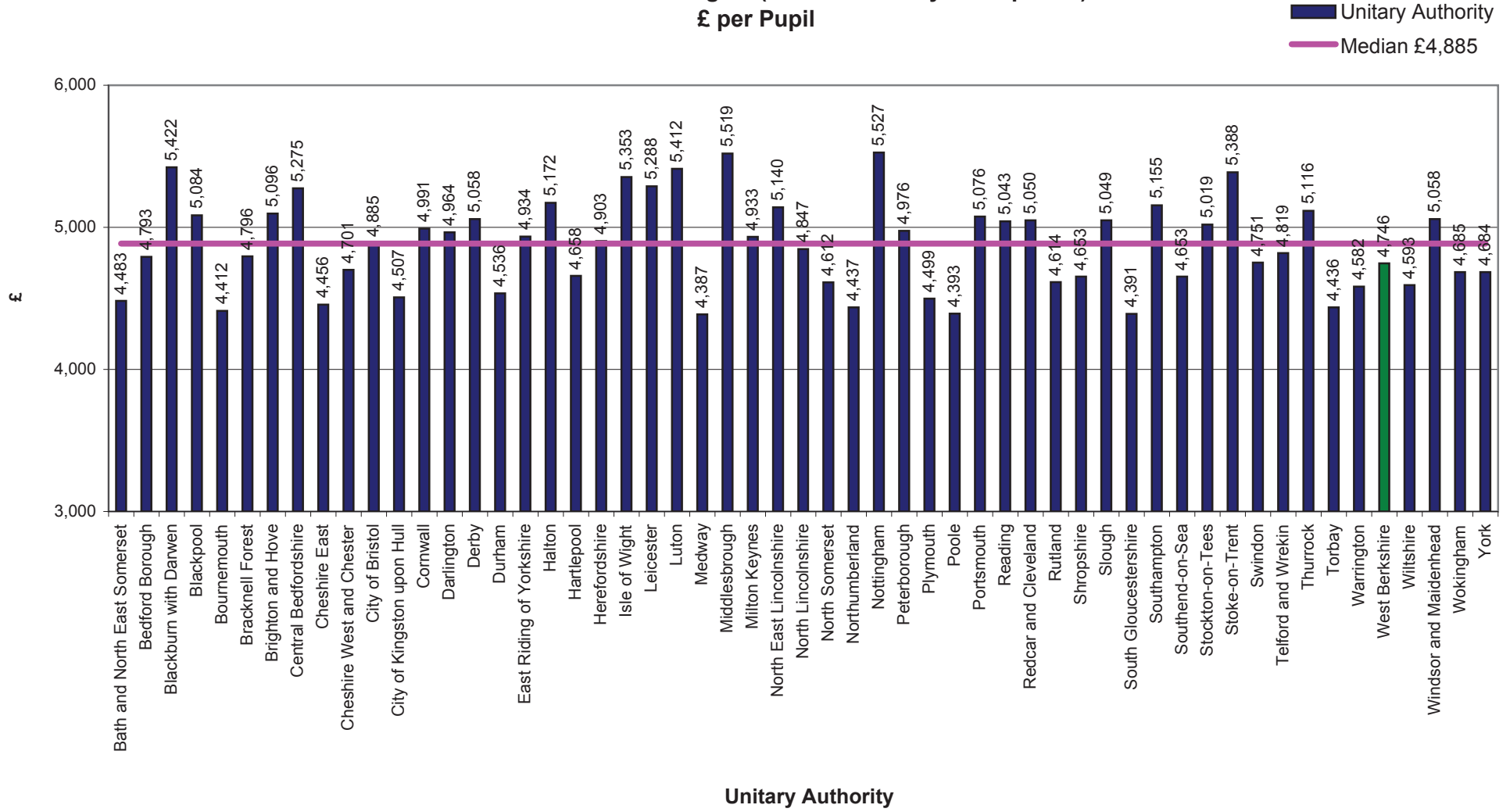
Appendix F
Unitary Authorities
2013-14 Individual School Budgets (before academy recoupment)
£ per Pupil

■ Unitary Authority
 — Median £4,240



Appendix G Unitary Authorities

2013-14 Total School Budgets (before academy recoupment) £ per Pupil



**Appendix H
Unitary Authorities
2013-14 High Needs Budget
£ per Pupil**

