

Public Document Pack

To: Forum Members: Patricia Brims, Nathan Butler- Broad, Fadia Clarke, Jeanette Clifford, Paul Dick, Reverend Mary Harwood, Jon Hewitt, Kate House, Peter Hudson, Brian Jenkins, Catherine Morley, Sheilagh Peacock, Derek Peaple, Chris Prickett, Chris Prosser, David Ramsden, Clive Rothwell, Graham Spellman, Suzanne Taylor, John Tyzack, Keith Watts, Stacey Williams and Charlotte Wilson

Councillors: Councillor David Allen and Councillor Irene Neill

Officers: Shannon Coleman-Slaughter, Carolyn Loosen, Ian Pearson, Jane Seymour and Claire White

SCHOOLS FORUM AGENDA

Monday, 29th September, 2014

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

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Any Other Business

Next Meeting: Monday 8th December 2014, 5pm at Shaw House

Agenda Item 2

Minutes of a Meeting of the Schools Forum

Monday 14th July 2014

Shaw House

Present:	Patricia Brims	Primary Schools	Governor	Brimpton Primary School	
	Jon Hewitt	Special Schools	Headteacher	The Castle School	
	Brian Jenkins		Early Years PVI Representative	Jubilee Day Nursery	
	Sheilagh Peacock	Primary Schools	School Business Manager	The Winchcombe School	
	Chris Prickett	Primary Schools	Headteacher	Streatley Primary School	
	Clive Rothwell	Secondary Schools	Governor	John O'Gaunt School	
	Eileen Selsey	Academies	Governor	Park House School	
	Graham Spellman		Roman Catholic Representative	Portsmouth Diocese	
	Suzanne Taylor		Headteacher	Hungerford Nursery School	
	John Tyzack	Primary Schools	Governor	Falkland Primary School	
	Keith Watts		Union Representative		
		Shannon Coleman-Slaughter		CYP & Safeguarding Finance Manager	
		Carolynn Loosen		Schools' Funding Officer	
		Robert O'Reilly		Head of Human Resources	
		Ian Pearson		Head of Education	
		Andy Walker		Head of Finance	
	Claire White		Schools' Finance Manager		

1. APOLOGIES RECEIVED

Councillor David Allen		Shadow Portfolio Holder for C&YP	
Sarah Brinkley	Secondary Schools	Headteacher	John O'Gaunt School
Nathan Butler-Broad	Primary Schools	Headteacher	Spurcroft Primary School
Fadia Clarke		FE Representative	Newbury College
Jeanette Clifford	Academies	Governor	St Bartholomew's School
Paul Dick	Academies	Headmaster	Kennet School
Reverend Mary Harwood		Church of England Representative	Oxford Diocese
Kate House	Primary Schools	Headteacher	The Ilsleys Primary School
Peter Hudson	Primary Schools	Governor	Mortimer St Johns Infant School
Catherine Morley	Primary Schools	Headteacher	Theale Primary School
Councillor Irene Neill		Executive Portfolio for C&YP	
Derek People	Academies	Headteacher	Park House School
David Ramsden	Secondary Schools	Headteacher	Little Heath School
Stacey Williams	Pupil Referral Units	Headteacher	Reintegration Service
Charlotte Wilson	Academies	Headteacher	Trinity School

Action

2. MINUTES OF PREVIOUS MEETING DATED 9TH JUNE 2014

The minutes of the meeting on 9th June were approved.

3. ACTIONS ARISING FROM PREVIOUS MEETINGS

Report on investing in West Berkshire High Needs Provision

On this meeting's agenda.

Mid-Year Review of Pupil Referral Unit Funding Arrangements

To be considered in the Autumn Term.

Trade Union Facility Time Annual Report and Proposals for the Arrangements and Budget in 2015/16

On this meeting's agenda.

Investigate Levels of Special Schools and Pupil Referral Unit Surplus Balance Limits in other Local Authorities

To be carried out by year end 2014/15 when surplus balances will be next considered.

4. DECLARATIONS OF INTEREST

Keith Watts who is the NUT representative and represents the Trade Unions on the Schools Forum and Eileen Selsey who is a Governor at Park House which employs two union representatives both declared an interest in Trade Union Facilities de-delegation report contained within item 9.

5. MEMBERSHIP

The election to fill the School Business Manager vacancy was concluded on 30th June and Sheilagh Peacock who is Schools Business Manager at The Winchcombe School was elected by the Primary Headteachers. Sheilagh was welcomed to her first meeting by the Schools Forum members.

6. SCHOOLS FORUM MEMBERSHIP AND CONSTITUTION

The Schools Forum remains proportionately representative of the number of pupils in each type of school and no legislative changes have been made that affect the constitution.

DECISION: No changes are to be made to the structure of the membership or the constitution.

The only member coming to the end of their term is Graham Spellman who has been re-nominated by the Diocese and will therefore continue on the Schools Forum for another term.

John Tyzack agreed to be the Chair of the Schools' Forum for a year in September 2013 and so the Forum will need to elect a new Chair.

ACTION: Nominations for Chair to Carolynn Loosen and Claire White.

All

7. FUNDING BID - PRIMARY SCHOOLS IN FINANCIAL DIFFICULTY

A bid from Bradfield Primary School for Primary Schools in Financial Difficulty Funding was presented to the Heads Funding Group on 1st July.

The bid meets the required criteria and is for £74k to meet one off redundancy costs, compensation payments and the cost of the Executive Head for the Summer term (this cost was met from the school's balances in 2013/14).

The school was placed in special measures in 2013 and earmarked for academy conversion, although this has not progressed due to problems in securing a sponsor. The uncertainty and being placed in special measures resulted in a decline in pupil numbers which has adversely affected the 2014/15 funding whilst at the same time the school required short term additional leadership and staff restructuring in order to bring the school out of special measures.

The small deficit in 2013/14 will increase significantly in 2014/15 and beyond without the funding.

DECISION: The Schools Forum agreed bid from Bradfield Primary School.

ACTION: Payment to be made to Bradfield Primary School.

C Loosen

8. SCHOOL FORMULA 2015/16

Claire White presented the report on the schools' formula 2015/16. The Department for Education (DfE) has yet to announce the arrangements for the 2015/16 funding formula.

It was proposed that the following changes are considered in principle:

Use of the Sparsity Factor

It was proposed that the distance criterion is reduced from the current 2 miles to 1.5 miles or more for primary schools with 90 pupils or less if this is allowed in the 2015/16 funding arrangements.

This would cost £279k in the primary sector in 2015/16 (excluding the MFG saving and based on the October 2013 pupil numbers) and benefit 8 out of 10 of the primary schools with less than 90 pupils.

The treatment of the federated primary schools would need to be considered.

Cap on Gains

It is likely that the MFG will continue, however some schools may have taken into account that the cap would end in their 2015/16 budgets. It is therefore proposed to no longer operate the gains cap in 2015/16. This would cost £52k using the current pupil numbers.

Deprivation and Prior Attainment Funding Rates

It is proposed to keep the same funding rates for 2015/16 although this may require additional funding and changes to the primary / secondary ratio. This will be reviewed once the October 2014 census data has been received from the DfE and the final decision will be made by the Schools Forum in the January

meeting subject to funding being available.

Exceptional Premises Factor

The criteria set by the Education Funding Agency (EFA) is that the nature of the premises cost 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 proposed to ask schools whether they meet the criteria and provide evidence that this is the case. To be included in the consultation with schools and considered at the next Schools Forum meeting in September.

Allocation of Additional Funding

If the LA benefits from any additional funding this will be allocated on a per pupil basis after allocations for the above circumstances have been made.

ACTION: The funding arrangements 2015/16 are to be communicated with the schools once they are received from the DfE. The schools are to be informed that the consultation with schools will be emailed to the Headteacher the week before the start of the Autumn Term.

C White

9. DE-DELEGATIONS 2015/16

Ian Pearson presented the report on the proposed de-delegations for 2015/16.

The Primary and Secondary school representatives on the Schools' Forum are required to make the pooling decision for their own school phase.

The services where maintained schools have the option to pool the funding so that the services can continue to be provided centrally and benefit from economies of scale are as follows:

Behaviour Support

Ian Pearson presented the report on Behaviour Support.

The anticipated budget requirement for 2015/16 is £212k (excluding academies).

Both primary and secondary maintained representatives recommend the pooling of funding. However the final recommendation will be considered by the Schools' Forum members at the September meeting following the consultation with the schools.

Ethnic Minority Support

Ian Pearson presented the report on the Ethnic Minority Support.

English language assessments and training for teachers and teaching assistants to support pupils where English is an additional language and pupils from a Gypsy, Roma and Traveller heritage continue to be in demand particularly in the primary schools.

The anticipated delegations for 2015/16 are £232k for primary schools and £30k for secondary schools.

Both primary and secondary maintained representatives recommend the pooling of funding. However the final recommendation will be considered by the Schools' Forum members at the September meeting following the consultation with the schools.

Trade Union Local Representation

Robert O'Reilly presented the report on the trade union facilities budget which compensates schools for release time for trade union representatives that they employ at their salary rate.

The trade union facilities outturn position for 2013/14 was 25% overspent and 2014/15 is expected to overspend again, particularly as more money is now required by the unions as one of the NASUWT representatives has been elected as a national representative which was not provided for in the budget.

The report included a proposal to change the compensation rates to schools which employ trade union representatives to supply teacher rates. However the schools are likely not to agree if the teacher is paid more than a supply teacher and any change in compensation rates would require consultation with the unions before final agreement.

Academies do not use the local representatives instead they choose to use the regional representatives who are paid for by the union.

If the decision is made to discontinue pooling arrangements by the schools then it will be difficult to reverse in the future.

At the Heads Funding Group there were no maintained secondary school Headteachers present to contribute to the trade union facilities budget discussion and the primary Headteachers present could not reach a decision and therefore were not in a position to make a recommendation.

The Schools Forum also found the decision was complicated by the funding issue. It was therefore decided to deal with the funding issue and the pooling arrangement separately. Both the Primary and Secondary maintained schools representatives present recommended in principle the pooling of the funding. The final decision will be made by Forum members at the September meeting.

Contingency for Schools in Financial Difficulty

£116k carried forward to 2014/15 resulting in a budget of £231k for 2014/15. Currently the £39k bid by The Ilsleys and the £74k bid by Bradfield Primary School have been approved by the Schools' Forum.

The Heads Funding Group primary school members recommended the continued pooling of the Schools in Financial Difficulty funding in 2015/16 to the

Schools Forum. The secondary school member present at the Schools Forum recommended that they continue not to pool the funding.
The final decision will be made by Forum members at the September meeting.

10. ASD RESOURCED PROVISION DEVELOPMENT

Ian Pearson presented the report on the development of West Berkshire's ASD resource provision.

Currently there are two ASD resource units one primary and one secondary both in Theale. It is proposed that in order to provide capacity for the increasing demand an additional 10 place primary resource unit and a 15 place secondary resource unit are required. The resource units are planned to open in September 2015.

The annual revenue cost 2015/16 for the primary resource is estimated to be £264k and for the secondary resource it is estimated to be £359k reducing to £164k and £209k respectively in 2016/17 (assuming that they are both full). The actual costs will be less to start with whilst the numbers build up. The unit cost of a place in a resource is significantly lower than those in a specialist independent or non maintained ASD school and some pupils will have top up funding diverted from their current placement.

DECISION: The Schools Forum agreed to allocate funds from the High Needs Block in respect of these developments.

11. HIGH NEEDS ARRANGEMENTS FOR SPECIAL SCHOOLS 2015/16

Ian Pearson presented the report on the high needs funding arrangements for special schools.

Currently special schools have 5 ASD funding bands and it is proposed to add a further three new bands:

ASD1a 1:6 teacher and 1:6 teaching assistant (TA) plus 25% additional TA time (pay scale C).

ASD6 1:6 teacher and 1:6 teaching assistant (TA) plus 200% additional TA time (pay scale D).

ASD7 1:3 teacher plus 200% additional TA (pay scale D).

ASD1a provides a mid-point between ASD1 and ASD2 for pupils who require more support than ASD1 but not as much as ASD2.

ASD6 and ASD7 incorporate the 2:1 TA support which is currently dealt with as an addition to the current funding bands. These bands will only be used in exceptional circumstances, usually short term, and is cheaper than placing pupils out of county.

DECISION: The Schools Forum agreed to the implementation of additional funding bands from April 2015.

12. HIGH NEEDS ARRANGEMENTS FOR MAINSTREAM SCHOOLS FROM SEPTEMBER 2014

Ian Pearson presented the report on the high needs funding arrangements for mainstream schools.

The proposal includes streamlining the number of SEN bands to 4 from 7 by removing the least well used bands and to stop expressing a statement in terms of the number of hours of support but in terms of the monetary value. Statements / Education Health Care Plans (EHP) will cease to be expressed in terms of hours from September 2014. The change over to the new funding bands will be phased in as the statements are converted to EHP at the pupil's annual review.

DECISION: The Schools Forum agreed the changes to the funding arrangements for pupils with statements / EHP from September 2014.

13. FUNDING OF THERAPY SERVICES

Ian Pearson presented the report on therapy services funding. If speech and language therapy and occupational health therapy services are included in part 3 of a pupil's statement as required for them to be able to access the curriculum then the cost is borne by the local authority education department rather than the health service. Currently the costs in West Berkshire, approximately £350k, are funded by the Education Service Budget but these costs are met from the DSG by some other local authorities, so that they can be protected.

ACTION: A more detailed report, including costs, is to be brought to the Heads Funding Group and Schools' Forum meetings on 25th November and 8th December respectively.

J Seymour

14. ENGAGING POTENTIAL

Ian Pearson presented the report on the Engaging Potential budget 2014/15. Engaging Potential provides education for up to 14 secondary SEN pupils with severe Behavioural, Emotional and Social Difficulties. The changing needs of the pupils means that additional staff are required to increase the pupil to staff ratio and additional training and more competitive teachers' salaries are required in order to reduce staff turnover. Engaging Potential continues to reduce their costs where possible. However this will still result in an increase of £49k in 2014/15 (pro rata) and £84k increase in 2015/16, which equates to a unit cost per pupil of £37k. This is still considered good value as the cost of a BESD school place is a minimum of £70k.

DECISION: The Schools Forum agreed that the additional costs from September 2014 will be met from the High Needs Block.

ACTION: £49k to be vired from the High Needs Block contingency.

S Coleman-Slaughter

It was noted that the previous 5 reports all contained additional funding required from the High Needs Block and if funding from this block was all spent this would impact on individual school budgets.

15. SCHOOL BUDGETS 2014/15 AND SCHOOLS IN FINANCIAL DIFFICULTY

Claire White presented the report on the schools budgets 2014/15 and schools in financial difficulty.

Of the 74 budgets submitted in 2014-15 only three schools have submitted a deficit budget John O'Gaunt Secondary School (£536k), Bradfield Primary School (£75k) and Kintbury Primary School (£25k).

John O'Gaunt

The school continues to operate with pupil numbers that do not generate sufficient funding to cover their costs. Discussions are on-going to find a solution and a deficit recovery plan that is acceptable to the West Berkshire Council, Hungerford Town Council, the school, the parents and the tax payer in West Berkshire. Hungerford Nursery, Primary and John O'Gaunt are all working closely together to generate positive publicity.

Bradfield Primary School

Bid for Primary Schools in Financial Difficulty funding was agreed under item 7 of this meeting.

Kintbury Primary School

Pupil numbers have fallen impacting on funding and the redundancy costs of a proposed restructure would take the school into deficit in 2014/15. The continuation of the Minimum Funding Guarantee in 2015/16 will allow the school to delay the restructure pending further financial modelling.

15 schools have set budgets with a contingency of £2k or less. This is expected as school balances continue to diminish, funding rates remain static but costs increase. 15 schools have also forecast a year 2 deficit of greater than £25k which will be reviewed with each school by Schools' Accountancy. None of the schools that submitted a year 2 deficit for 2014/15 in their 2013/14 budget plan have actually submitted one in 2014/15. This is due to improved financial planning and assistance from Schools' Accountancy where necessary.

ANY OTHER BUSINESS

The level of the trade union facilities funding is not currently sufficient.

ACTION: Finance plan to be brought to the next Heads Funding Group meeting on Thursday 18th September.

K Watts

After the meeting Eileen Selsey tendered her resignation from the Schools Forum due to her retirement from her governor role.

ACTION: The Academies need to decide on a new Governor Representative.

Academies

Meeting closed 6.45 p.m.

Date of next meeting: Monday 29th September 2014

Time: 5pm

Venue: Shaw House

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Agenda Item 3

ACTIONS ARISING FROM PREVIOUS SCHOOLS' FORUM MEETINGS 2014/15

Ref No.	Date – Item No.	Action	Officer	Comment / Update
1	03/03/14 - 7	Report on investing in West Berkshire high needs provision to further reduce the use of more expensive out of county provision.	J Seymour	To be presented at the HFG on 1st July and SF on 14 th July
2	03/03/14 - 8	Mid-year review of PRU funding arrangements.	C Burnham	Due Autumn Term
3	03/03/14 - 12	Capita School Funding Conference materials to be emailed to all Schools' Forum members.	C Loosen	Complete – emailed on 7/3/14
4	03/03/14 - 14	Trade Union facility time annual report to be added to the Schools' Forum work programme.	C Loosen	On SF Agenda for 14 th July
5	03/03/14 - AOB	Trade Union facility time proposals for the arrangement and budget in 2015/16 to be brought to Schools' Forum.	K Watts & J Milone	To be presented at the HFG on 1st July and SF on 14 th July
6	03/03/14 - AOB	Schools' Forum Regulations 2012 (updated) to be emailed to Schools' Forum members.	C Loosen	Complete – emailed on 7/3/14
7	09/06/14 - 5	Election to be held to fill the Primary School Business Manager vacancy.	C Loosen	Complete – appointment made on 30 th June
8	09/06/14 - 6	Each school with an excess balance to be informed of the Schools Forum decision.	C White	Complete – each school informed by e-mail on 10 th June
9	09/06/14 – 6b	Investigate what other LAs do and determine what should be a reasonable excess surplus balance limit for special schools and PRUS	C White	Due year end 2014/15
10	09/06/14 - 7	Amendments to be made to the DSG budget as set out in minutes.	C White	Complete – DSG budget updated
11	09/06/14 - 8	Primary schools in financial difficulty money to be made to The Ilsleys	C Loosen	Complete – payment made on 17 th June
12	09/06/14 - 9	The scheme for financing schools to be circulated	C Loosen	Complete – posted on website and e-

		and posted on the West Berkshire website		mailed to schools on 17 th June
13	09/06/14 - 10	Provide Claire with their opinions on the allocation of the additional DSG funding and any adjustments required to the local formula factors by 20 th June.	All SF members	Deadline now passed - 2 members responded
14	09/06/14 - 11	SVFS questions to be taken up with Laura King on behalf of the Schools' Forum	C White	Complete – answers e-mailed to SF members on 30 th June 2014
15	14/07/14 - 6	Nominations for Chair to Claire White and Carolynn Loosen	All SF members	Due September meeting
16	14/07/14 - 7	Primary School in Financial Difficulty Funding to Bradfield Primary School	C Loosen	Complete – payment made 17/7/14
17	14/07/14 - 8	2015/16 funding arrangements to be communicated to schools once received from the DfE	C White	Complete – e-mailed to schools on 21 st July 2014
18	14/07/14 - 8	Schools to be informed that the consultation with schools will be emailed to the Headteacher the week before the start of the Autumn Term	C White	Complete – consultation e-mailed to schools on 26 th August
19	14/07/14 - 13	Funding for Therapy Services detailed report including costings	J Seymour	HFG 25/11/14 SF 08/12/14
20	14/07/14 - 14	Engaging Potential £49k to be vired from the High Needs Block contingency to 90577	S Coleman-Slaughter	
21	14/07/14 - AOB	TU Facilities finance plan	K Watts	Taken to HFG 18/09/14
22	14/07/14 - AOB	Appointment of new Academies Governor Representative	Academy members	

West Berkshire Schools' Forum	
Title of Report:	School Formula 2015/16
Date of Meeting:	29th September 2014
Contact Officer(s)	Claire White & Ian Pearson
For Decision	

1. Background

1.1 The Department for Education (DfE) announced the arrangements for the 2015/16 funding formula for primary and secondary schools on 17th July 2014. As expected, there are just a few minor amendments to the regulations, and the relevant proposals agreed at the Schools' Forum meeting on 14th July went out to all schools for consultation on 26th August. The consultation document is attached (Appendix A).

1.2 The consultation document sets out the changes made by the DfE and the proposals for the West Berkshire formula for 2015/16.

2. Proposal

2.1 The consultation with schools closed on 11th September. There were 2 responses to the specific proposals on the school formula for 2015/16 (questions 1 to 4). Schools were only asked to respond if they disagreed with any proposal or wanted to submit a case for exceptional premises costs to be included within the formula.

2.2 One of the responses was a comment from a small primary school (who meets the current DfE sparsity criteria) disappointed that there are no changes proposed to the sparsity factor. West Berkshire has tried through several channels to get the DfE to act upon our very valid arguments to change the distance criteria to give us the option to fund our small primary schools in a fair and equitable way. Unfortunately the DfE continues to refute these arguments and has not changed the sparsity distance criteria for 2015/16.

2.3 The second response was from The Willink, submitting a case for funding of exceptional premises costs. Appendix B contains their case.

2.4 The following recommendations for changes to the 2015/16 formula were agreed by the Heads Funding Group on 18th September:

- (1) In order to provide schools with stability to their funding for a third year, the formula factors are to remain the same as those used in 2014/15. There are no perceived anomalies that need to be

addressed, and it is felt that the current formula is as equitable and fair as it can be within the current funding regulations.

- (2) The funding cap that was placed on schools with "per pupil" funding gains since the new formula was introduced in 2013/14 is to be removed so that schools gaining funding through the new formula receive the full amount of this funding. It was expected that this cap would only be in place for two years (same as minimum funding guarantee (MFG) protection for those schools losing funding), though the MFG protection is now to be continued.
- (3) The funding rates for each formula factor are to remain the same (including the rates used for the deprivation and prior attainment factors - a change from previous years which maintained the total level of this funding block). Compared to the national averages, West Berkshire is not an outlier in the rates used for the main factors and lies close to the average. It does not make sense to attempt to pre-empt rates that a national formula may use which may be no closer to the final rates than the current rates being used by West Berkshire.
- (4) It is agreed that the case received from The Willink for joint use of leisure facilities is exceptional, and is to be submitted to the EFA for approval to use this factor in West Berkshire's formula. The funding is to be at 50% of the actual total cost, based on the last financial year the actual cost is available for and meets the exceptional criteria.
- (5) Once the 2015/16 schools block of the Dedicated Schools Grant funding allocation is known (expected mid December 2014), any shortfall in funding or additional funding available will be allocated by an adjustment to the basic per pupil rate.

2.5 The recommended formula for 2015/16 to be submitted to the Council's Executive for approval is as follows:

Factor	Rate - Primary	Rate - Secondary
Basic Entitlement per Pupil:		
Primary	£2,919	
Secondary KS3		£4,346
Secondary KS4		£4,346
Prior Attainment per eligible Pupil	£284	£2,063
Deprivation per eligible Pupil:		
Free School Meals Ever 6	£875	£670
Income Deprivation Affecting Children Index (IDACI):		
IDACI Band 1	£40	£60
IDACI Band 2	£120	£180
IDACI Band 3	£240	£360
IDACI Band 4	£240	£360
IDACI Band 5	£240	£360
IDACI Band 6	£240	£360
English as an Additional Language	£345	£345

Looked After Children	Not used	Not used
Pupil Mobility	Not used	Not used
Rates - actual cost to school	Actual cost	Actual cost
Lump Sum per School	£126,400	£126,400
Sparsity	Not Used	£100,000
Split Sites	Not used	Not used
Post 16	Not used	Not used
Exceptional Premises Factor (cost in excess of 1% of total delegated funding and applies to less than 5% of schools) – joint use of leisure facilities	50% of actual cost	50% of actual cost

2.6 The only impact on individual schools will be where they are receiving minimum funding guarantee due to the original formula changes (their funding will reduce by 1.5% per pupil) or their funding gains were being capped (they will now benefit in full from the original formula changes). The exemplification in the consultation document uses current (October 2013) data. Schools' final funding allocation for 2015/16 will be based on their pupil numbers (and other relevant data) in the October 2014 census. If this changes significantly then so will their funding.

Recommendation: To recommend to the Council's Executive for approval the formula for 2015/16 as set out in this report

Appendices

Appendix A – Proposed Funding Formula for 2015/16 – Consultation Document sent to schools.

Appendix B – The Willink School – Exceptional Premises Costs

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Primary and Secondary Schools Proposed Funding Formula for 2015/16

Consultation Document for Schools 26th August 2014 to 11th September 2014

1. Introduction

- 1.1 The Department for Education (DfE) introduced major changes to school funding in 2013/14 in relation to how local authorities distribute funding to schools, followed by further minor changes in 2014/15. It was expected that there would be the introduction of a full national funding formula for schools in 2015/16 (using national funding rates), but this has been replaced with minimum funding levels for 2015/16. This ensures that all local authorities are funded at least at the same cash level per pupil as in 2014/15 and allocates an additional £390m in 2015/16 to the least fairly funded authorities. The intention is still to phase in a national funding formula starting in the next spending review period, with national funding rates introduced gradually.
- 1.2 Following a national consultation in March 2014, on 17th July 2014 the DfE announced the minimum funding levels and funding arrangements for 2015/16 in their document “Fairer schools funding: arrangements for 2015 to 2016” which is recommended should be read in conjunction with this document. This and other documents relating to the school funding reforms can be accessed via the DfE website.¹
- 1.3 The additional allocation of £390m to the least fairly funded local authorities is based on a calculation of the 2014/15 average funding rates used by all local authorities for a range of formula factors to determine a minimum funding level. This is then converted to an individual funding rate per pupil for each local authority. This rate per pupil is now set for 2015/16 (an increase of £16.44 per pupil for West Berkshire Council) but the additional funding to be received will be based on the number of pupils recorded in the October 2014 census. Using current pupil numbers this will equate to approximately an additional £318k for West Berkshire. Note that the official announcement cited £400k for West Berkshire, but this was rounded up from £359k, and then the DfE has deducted an additional £41k for the carbon reduction commitment

¹ <https://www.gov.uk/government/publications/fairer-schools-funding-arrangements-for-2015-to-2016>

having changed the amount deducted in 2014/15 which was based on actual spend, to a per pupil deduction of £7.51 in 2015/16.

- 1.4 It should be noted that there is no expectation that local authorities should implement these minimum funding levels in their formula – it is simply a method of allocating schools block funding to the local authority, and it is for the local authority in conjunction with its schools' forum to determine how funding is best passed down to schools to meet local circumstances, and how much needs to be centrally retained. It is however expected that any additional funding will be passed on to schools. As the West Berkshire Schools' Forum agreed to a planned overspend of £166k on the schools block budget in 2014/15, this will be a first call on funding received in 2015/16. The additional resources available in 2015/16 will therefore be minimal.
- 1.5 At the Schools' Forum meeting held on 14th July 2014, it was agreed that there should be no changes to the West Berkshire formula in order to prevent any further turbulence in school budget allocations and to provide a third year of stability. The largest proportion of funding is allocated through the per pupil rate and lump sum and these rates fall close to the national average. The primary/secondary ratio is also at the average. There is no reason to expect that a future national funding formula would replicate the rates used to calculate the minimum funding levels, and schools would not receive these funding rates in their formula as other formula factors not used in the calculation of minimum funding levels need to be funded and deductions still need to be made for centrally retained services. Applying these rates would move funding currently allocated through the basic per pupil rate to the deprivation and prior attainment funding rates, and overall move more than £1m of funding out of the Secondary sector. As the move to national rates will be a phased introduction, it is proposed that we wait for this and keep our funding rates the same for now rather than move to pre-empted national rates. There are therefore just a few minor amendments to be considered which are set out in this document.
- 1.6 Schools are invited to make comments on the proposed amendments and allocation of the additional funding. If you **do not agree** with any proposal (each proposal is highlighted in a box within the text), or have comments/different proposals to make, please e-mail your response to Claire White, Schools' Finance Manager cwhite@westberks.gov.uk by **11th September 2014**. In order for the Schools' Forum to consider a response, it should be accompanied by clear rationale on why you disagree with a proposal or why a proposal you are making is a better solution and fair and equitable for all schools in West Berkshire, and not just for your own individual school. If we do not hear from you we will assume that you are happy with all the proposals in this document.

2. Current Formula

- 2.1 **Appendix A** is an extract from the DfE documentation detailing the allowable funding factors. The following table summarises the current West Berkshire formula, and for the main factors, the 2014/15 average funding rate for all local authorities:

Factor	Rate	Units	Funding	National
Basic Entitlement:				
Primary	£2,919	12,600	£36,779,400	£2,880
Secondary KS3	£4,346	5,439	£23,637,894	£3,950
Secondary KS4	£4,346	3,807	£16,545,222	£4,502
Prior Attainment:				
Primary	£284	2,710	£769,563	
Secondary	£2,063	2,063	£2,320,785	
Deprivation:				
Primary FSM Ever 6	£875	1,744	£1,526,385	
Primary IDACI Band 1	£40	369	£14,749	
Primary IDACI Band 2	£120	765	£91,746	
Primary IDACI Band 3	£240	489	£117,247	
Primary IDACI Band 4	£240	84	£20,184	
Primary IDACI Band 5	£240	7	£1,675	
Primary IDACI Band 6	£240	0	0	
Secondary FSM Ever 6	£670	1,503	£1,006,762	
Secondary IDACI Band 1	£60	336	£20,167	
Secondary IDACI Band 2	£180	531	£95,647	
Secondary IDACI Band 3	£360	562	£202,187	
Secondary IDACI Band 4	£360	34	£12,208	
Secondary IDACI Band 5	£360	8	£2,862	
Secondary IDACI Band 6	£360	1	£360	
English as an Additional Language:				
Primary EAL 3	£345	559	£192,869	
Secondary EAL 3	£345	79	£27,303	
Looked After Children	Not used			
Pupil Mobility	Not used			
Rates:				
Primary	Actual		£630,769	
Secondary	Actual		£322,950	
Lump Sum:				
Primary	£126,400	66	£8,342,400	£127,460
Secondary	£126,400	10	£1,264,000	£137,760
Sparsity				
Primary	Not used			
Secondary	£100,000	1	£100,000	
Split Sites	Not used			
Post 16	Not used			
Exceptional Premises	Not used			
Minimum funding Guarantee/Cap on Gains:				
Primary			£286,442	

Secondary			£47,356	
TOTAL			£94,379,132	
Primary/Secondary Ratio			1.27	1.27
Percent of Funding through basic entitlement			82%	76%
Percent of funding through pupil Led			88%	90%

2.2 The main concern with the current formula continues to be that it does not deliver sufficient funding for the viability of our very small schools (less than 90 pupils). Despite support from the local MP, a visit to the DfE, and providing alternative solutions to the DfE direct and through their consultation, no changes have been made to the regulations for 2015/16 that will enable most of our very small primary schools to be eligible for “sparsity” or any other form of additional funding. Additional funding can now be made to very small secondary schools, but this is for schools with less than 350 pupils, so none of our secondary schools qualify. No changes regarding West Berkshire’s use of the sparsity factor are therefore proposed.

3. Formula Proposals for 2015/16

a) Removal of the Gains Cap

In order to pay for the minimum funding guarantee (MFG) in 2013/14 and 2014/15, local authorities needed to place a cap on the per pupil funding increase where schools benefitted from the change in the formula. When the new formula was introduced for 2013/14 the DfE stated that the MFG would be for 2 years only, thus the cap on gains would apply for just 2 years. The cap was set at 2.4% in West Berkshire, which partly offsets the cost of the MFG (£230k of a total £563k in 2014/15). The DfE will now continue the MFG protection, and in 2015/16 funding per pupil cannot drop by more than 1.5%. However, schools with a gains cap will have been planning their budgets assuming the cap would be removed in 2015/16. It is therefore proposed to no longer operate the gains cap in 2015/16. **Appendix B** shows the schools affected and the likely cost would be £52k, based on the same pupil numbers and formula as the current year.

1. Do you agree that the Gains Cap should be removed? If not, please let us know with your reasons why.

b) Funding Rate for Deprivation and Prior Attainment

The current methodology for these factors is that the total funding distributed each year is kept the same (separate funding amounts maintained for primary and secondary), with the funding rate being adjusted according to the number of eligible pupils. Therefore if the number of eligible pupils increases, the funding received for each eligible pupil decreases. If the numbers of eligible pupils increases, it is perhaps fairer to keep the same funding rate so that a similar level of support per pupil can be maintained by the school. It is therefore proposed to keep the same funding rates for 2015/16, even if this requires additional funding and changes the primary/secondary ratio of funding. If the numbers of eligible pupils for funding decreases, the option is to

increase the funding rate or maintain the current rate reducing the overall funding being distributed via these factors.

2. Subject to available funding, do you agree that the funding rates for deprivation and prior attainment should remain the same for 2015/16 and not change according to the numbers of eligible pupils? If not, please let us know with your reasons why.

c) Exceptional Premises Factor

The current regulations allow for the local authority to make requests to the Education Funding Agency (EFA) to include an exceptional premises factor. The criteria set by the EFA is that the nature of the school premises give rise to significant additional costs greater than 1% of the school's total budget allocation and that such costs affect fewer than 5% of the schools (including academies) in the authority. Examples of costs that have been approved by the EFA are for rents, joint use of leisure facilities by contractual agreement, and listed buildings. Schools should consider whether they may meet the criteria and demonstrate that the criteria are met e.g. submit a copy of the contract containing the contract sum. If satisfied that the school meets the criteria, the Schools' Forum will consider whether to include in the funding formula at full cost, a percentage of the full cost, or the cost exceeding the 1%, and if agreed will be submitted to the EFA for their approval.

3. If you consider that your school meets the criteria for exceptional premises costs please provide details.

d) Increasing the Per Pupil Funding

After the above has been applied, plus any increases to funding for rates at actual cost, it is proposed that should there be any remaining funding in the schools block it is allocated to schools through the per pupil funding rate. The final rate cannot be determined until we have the October census data, and as it is likely to be minimal if at all, no increase has been included in the exemplification.

- 4 Do you agree that if there is any remaining additional funding then this should be allocated on a per pupil basis? If not, please let us know with your reasons why.

4. Formula Exemplification for 2015/16

4.1 **Appendix C** shows the formula exemplification for 2015/16 using the same pupil numbers as 2014/15. As the only change that can be modelled at this stage is the removal of the gains cap, there is no change to school budget allocations prior to the application of the Minimum Funding Guarantee (MFG), so the exemplification just shows schools the effect of the continuation of the MFG and removal of the gains cap. The final funding rates will be dependent on the final funding allocation received by the LA and whether there is enough funding to maintain the deprivation and prior attainment rates, and whether

any funding is allocated through the exceptional premises factor. Individual school allocations will be dependent on the October 2014 census data.

Appendix C is also provided as a separate 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 2014 (yellow boxes) to see their likely funding for 2015/16 and beyond based on the current funding rates. 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.

5. Additional Funding Outside the School Formula

5.1 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 2015. Should schools have any comments on the current criteria applied they should respond as part of this consultation. They are attached alongside this document.

5.2 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 – 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
- Primary Schools in Financial Difficulty
- Schools with a disproportionate number of high needs pupils which cannot be reflected adequately in their formula funding. This needs to be made through a formula.

5. If you have any comments/suggestions on the criteria set to access the additional funds please provide details

5.3 **Appendix D** is an extract from the DfE documentation summarising other funding allocations that schools receive – either as a formula or as a grant.

5.4 There are no proposals to change high needs funding (top ups, resource units). Place funding of £10,000 for resource units remains for 2015/16, and the number of places to be funded will remain the same unless there are exceptional circumstances. The move to a system of place funding based on actual places filled in the previous academic year has been delayed until at least 2016/17. The DfE will however shortly be consulting on changing the place funding for alternative provision (PRUs) from £8,000 to £10,000 per place from September 2015.

5.5 There are no proposals to change early years funding in 2015/16, though the DfE is still committed to achieving a national early years funding formula in the future. There will however be the introduction of an early year's pupil premium, and the DfE is currently at consultation stage on this.

5.6 No announcement has been made yet on the likely Pupil Premium Grant (PPG) rates or arrangements for 2015/16.

6. De-delegations 2015/16

6.1 From 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 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.

6.2 The relevant Schools' Forum representatives for each phase will vote on whether each service is to be de-delegated or not. Each of these services was reviewed at the Schools' Forum meeting on 14th July, and the papers and minutes can be found on the West Berkshire Schools' Forum webpage.² The current view of Schools' Forum Members is as follows:

Service to De-delegate	Primary View	Secondary View
Behavioural Support	Yes	Yes
Ethnic Minority Support	Yes	Yes
Trade Union Local Representation	Yes	Yes
Contingency for schools in financial difficulty	Yes	No

6.3 **Appendix E** provides an indication of the likely charges – the unit charges per pupil and the total per school based on the data from the October 2013 census (final charges will be based on the October 2014 census data).

6.4 The final decision will be made by the Schools' Forum on 29th September. Schools may wish to contact their Schools' Forum representative direct to express their view, or respond as part of this consultation.

6. If you do not agree with any of the above decisions on the de-delegation of services, please let us know with your reasons why

7. Timetable

7.1 The timetable for finalising the formula and schools budgets for 2015/16 is as follows:

² <http://decisionmaking.westberks.gov.uk/mgCommitteeDetails.aspx?ID=335>

Consultation with schools	26 th August to 11 th September 2014
Heads Funding Group consider the responses from schools and make recommendation to Schools' Forum	18 th September 2014
Schools' Forum agree the formula to recommend to the Council. Vote taken on de-delegations	29 th September 2014
Council's Executive agree school formula for 2014/15	9 th October 2014
Submission of formula to Education Funding Agency	31 st October 2014
October census data issued and funding allocation received – able to finalise formula	Mid December
Schools' Forum set the funding rates for the formula	19 th January 2015
Final formula submitted to Education Funding Agency	20 th January 2015
Confirmation of final budget allocations to maintained schools	27 th February 2015

Appendices

Appendix A – Allowable Funding Factors

Appendix B – Cap on Gains and Minimum Funding Guarantee

Appendix C – Proposed Formula f2015/16 - Exemplification for Individual Schools
(also provided as separate spreadsheet for schools to see their own formula budget allocation detail and for their own modelling purposes)

Appendix D – Other Funding Allocations

Appendix E – Proposed De-delegations for 2015/16

Appendix A

Allowable Funding Factors

Factor	Further information – 2014-15 position	Changes for 2015-16
<p>1. Basic entitlement A compulsory funding factor that assigns funding to individual pupils, with the number of pupils for each school or academy based on the October pupil census.</p>	<p>Funding allocated according to an age-weighted pupil unit (AWPU). A single rate for primary age pupils, which must be at least £2,000. There may be different rates for key stage 3 and key stage 4, with a minimum of £3,000 for each. Local authorities may choose to increase the pupil number count where schools had previously had higher reception pupil numbers in January than in the October census.</p>	None
<p>2. Deprivation A compulsory factor</p>	<p>Local authorities may choose to use free school meals and/or the Income Deprivation Affecting Children Index (IDACI). Free meals can be measured either at the previous October census or “ever 6” – the number of pupils entitled to free meals at any time in the last 6 years – but not both. The IDACI measure uses 6 bands and different values can be used for each band. There may be separate unit values for primary and secondary.</p>	None
<p>3. Prior attainment An optional factor (although it is used by nearly all local authorities). It acts as a proxy indicator for low level, high incidence special educational needs</p>	<p>May be applied for primary pupils identified as not achieving the expected level of development within the early years foundation stage profile (EYFSP) and for secondary pupils not reaching L4 at KS2 in either English or maths.</p> <p>The EYFSP changed in 2013, so a weighting may be used to ensure that funding delivered through the primary prior attainment factor is not disproportionately affected by the year groups (years 1 and 2) assessed under the new framework. For pupils assessed using the old profile (years 3 to 6), local authorities will continue to be able to choose between two EYFSP scores, targeting funding to either all pupils who achieved fewer than 78 points; or all pupils who achieved fewer than 73 points on the EYFSP.</p> <p>In 2012 the KS2 English assessment methodology was changed and now includes a reading test, a new grammar, punctuation and spelling test and teacher assessed writing.</p> <p>For those assessed at KS2 up to 2011, the English element of the KS2 measure will identify those pupils who fail to achieve a level 4 in English.</p> <p>For pupils assessed at KS2 from 2012</p>	None

	onwards and who have been part of these new arrangements, the English element of the KS2 measure will identify those who do not achieve a level 4 in either the reading or teacher assessed writing elements	
4. Looked-after children An optional factor	A single unit value may be applied for any child who has been looked after for one day or more as recorded on the local authority SSDA903 return at 31 March 2014. This data is mapped to schools using the January school census, enabling identification of the number of looked-after children in each school/academy.	None
5. English as an additional language (EAL) An optional factor	EAL pupils may attract funding for up to 3 years after they enter the statutory school system. Local authorities can choose to use indicators based on one, two or three years and there can be separate unit values for primary and secondary	None
6. Pupil mobility An optional factor	This measure counts pupils who entered a school during the last three academic years, but did not start in August or September (or January for reception pupils). There is a 10% threshold and funding is allocated based on the proportion above the threshold – so if a school has 12% mobility, then 2% of pupils would attract funding.	None
Proportion allocated through pupil-led factors	Local authorities must allocate at least 80% of the delegated schools block funding through pupil-led factors (the factors in lines 1-6 above, and London fringe uplift where relevant).	None
7. Sparsity An optional factor	Pupils are allocated to their nearest school. For each school, the average distance as the crow flies to those pupils' second nearest school is calculated. Schools can only qualify for sparsity funding if this distance is greater than 2 miles for primary, middle or all-through and 3 miles for secondary, and if they have fewer than 150 pupils for primary or 600 pupils for secondary, middle or all-through. Local authorities can narrow the criteria (set a greater distance or smaller maximum size). The maximum amount which can be allocated to an individual school through this factor is £100,000 (including fringe uplift). Local authorities can choose whether to use a single amount for all sparse schools, or to use a tapered amount which increases the	For 2015-16, the average size of year groups within the school will determine eligibility. Schools will only qualify if total pupils divided by the number of year groups are below the threshold for the phase, which are: <ul style="list-style-type: none"> • Primary: 21.4 • Secondary: 120 • Middle: 69.2 • All-through: 62.5. Different sparsity amounts (up to the £100,000 maximum) can be specified for primary,

	smaller the school.	middle, all-through and secondary schools. In exceptional circumstances, local authorities can apply to SoS to target up to an additional £50,000 of sparsity funding at very small secondary schools where the total number on roll is 350 or less, where the sparsity distance is 5 miles or more, and where pupils in years 10 and 11 are present.
8. Lump sum An optional factor (although in 2014-15 it was used by all local authorities)	Local authorities can set different lump sums for primary and secondary (middle schools receive a weighted average based on the number of year groups in each phase). The maximum lump sum is £175,000, including London fringe uplift. Where schools amalgamate, they will retain 85% of the total lump sums in the year after the amalgamation (or in the same year if they amalgamate on 1 April) instead of receiving just a single lump sum immediately. Local authorities may apply to vary the additional payment in exceptional circumstances. Where schools amalgamate after 1 April, the new school will receive funding equivalent to the formula funding of the closing schools added together for the appropriate proportion of the year and will receive the 85% allocation in the following year.	Local authorities may apply for an exceptional factor to pay a further allowance to amalgamating schools in the second year after amalgamation. Local authorities may also wish to apply to exclude the exceptional factor payment from the MFG baseline.
9. Split sites An optional factor	The purpose of this factor is to support schools which have unavoidable extra costs because the school buildings are on separate sites. Allocations must be based on objective criteria, both for the definition of a split site and for how much is paid	None
10. Rates An optional factor (although in 2014-15 it was used by all local authorities)	These must be funded at the authority's estimate of the actual cost. Adjustments to rates may be made outside of the funding formula; however they must be reflected as being part of the Individual Schools Budget (ISB). An additional allocation could be made to a school (e.g. from balances brought forward). This should be reflected in the Section 251 outturn statement and in each school's accounts. The effect on the school will be	None

	zero since the rates adjustment will be offset by a change in the cost of the rates.	
11. Private Finance Initiative (PFI) contracts An optional factor	The purpose of this factor is to support schools which have unavoidable extra premises costs because they are a PFI school and/or to cover situations where the PFI “affordability gap” is delegated and paid back to the local authority. Allocations must be based on objective criteria, capable of being replicated for any academies in the authority area	None
12. London fringe An optional factor, but only for the five local authorities to which it applies (Buckinghamshire, Essex, Hertfordshire, Kent and West Sussex)	The purpose of this factor is to support schools which have to pay higher teacher salaries because they are in the London fringe area, and where only part of the authority is in this area. It is applied as a multiplier to relevant factors.	None
13. Post-16 An optional factor, but can only be used where the local authority had such a factor in 2014-15	A per-pupil value which continues funding for post-16 pupils up to the per pupil level that the authority provided in 2014-15.	None
14. Exceptional premises factors Local authorities can apply to EFA to use exceptional factors relating to premises. The most frequently approved factors are for rents and for joint-use sports facilities.	The exceptional factors must relate to premises costs and applications should only be submitted where the value of the factor is more than 1% of a school’s budget and applies to fewer than 5% of the schools in the authority’s area. Any factors which were used in 2014-15 can automatically be used in 2015-16 provided that the above criteria are still met.	A further school or schools may receive the factor if it meets the existing approved criteria, provided the additional factor still applies to fewer than 5% of schools in the area.

Appendix B
Cap on Gains and Minimum Funding Guarantee

School Formula - Cap on Gains and Minimum Funding Guarantee						
School	Cap on Gains @ 2.4%		MFG @ -1.5%		Net	
	2015/16 based on same pupil numbers & formula		2015/16 based on same pupil numbers & formula		2015/16 based on same pupil numbers & formula	
	2014/15 Actual		2014/15 Actual		2014/15 Actual	
91000 Aldermaston Church of England Primary School	0	0	0	0	0	0
91100 Basildon Church of England Primary School	0	0	0	0	0	0
91300 Beedon Church of England Controlled Primary School	0	0	10,892	8,729	10,892	8,729
91400 Beenham Primary School	0	0	0	0	0	0
91200 Birch Copse Primary School	0	0	0	0	0	0
91500 Bradfield Church of England Primary School	0	0	0	0	0	0
91600 Brightwalton Church of England Aided Primary School	0	0	0	0	0	0
91700 Brimpton Church of England Primary School	0	0	20,814	18,616	20,814	18,616
91800 Bucklebury Church of England Primary School	-2,507	0	0	0	-2,507	0
91900 Burghfield St. Mary's Church of England Primary School	-1,218	0	0	0	-1,218	0
92000 Calcot Infant School & Nursery	-18,713	-573	0	0	-18,713	-573
92100 Calcot Junior School	-60,195	-43,755	0	0	-60,195	-43,755
95600 Chaddleworth St. Andrew's Church of England Primary School	-11	0	0	0	-11	0
92400 Chieveley Primary School	0	0	0	0	0	0
95900 Cold Ash St. Mark's Church of England Primary School	0	0	0	0	0	0
92200 Compton Church of England Primary School	0	0	6,496	0	6,496	0
92300 Curridge Primary School	-2,033	0	0	0	-2,033	0
92500 Downsway Primary School	0	0	0	0	0	0
92800 Enborne Church of England Primary School	-2,852	0	0	0	-2,852	0
92900 Englefield Church of England Primary School	0	0	4,188	0	4,188	0
93000 Falkland Primary School	0	0	50,913	29,973	50,913	29,973
93100 Fir Tree Primary School & Nursery	0	0	0	0	0	0
93200 Francis Baily Primary School	0	0	116,631	90,443	116,631	90,443
93400 Garland Junior School	-1,927	0	0	0	-1,927	0
93500 Hampstead Norreys Church of England Primary School	0	0	2,425	0	2,425	0
93600 Hermitage Primary School	0	0	0	0	0	0
93700 Hungerford Primary School	0	0	0	0	0	0
92700 The Ilsleys' Primary School	0	0	152	0	152	0
93800 Inkpen Primary School	0	0	5,811	2,031	5,811	2,031
93900 John Rankin Infant & Nursery School	-7,890	0	0	0	-7,890	0
94000 John Rankin Junior School	-11,051	0	0	0	-11,051	0
94100 Kennet Valley Primary School	0	0	0	0	0	0
94200 Kintbury St. Mary's Church of England Primary School	0	0	42,565	34,786	42,565	34,786
94300 Lambourn Church of England Primary School	0	0	0	0	0	0
94400 Long Lane Primary School	0	0	0	0	0	0
95800 Mortimer St. Johns Church of England Infant School	-2,908	0	0	0	-2,908	0
97500 Mortimer St. Mary's Church of England Junior School	0	0	0	0	0	0
94500 Mrs. Bland's Infant & Nursery School	0	0	0	0	0	0
94600 Pangbourne Primary School	0	0	0	0	0	0
94700 Parsons Down Infant School	0	0	5,196	0	5,196	0
94800 Parsons Down Junior School	0	0	0	0	0	0
94900 Purley Church of England Infants School	-2,304	0	0	0	-2,304	0
95000 Robert Sandilands Primary School & Nursery	0	0	424	0	424	0
95100 Shaw-cum-Donnington Church of England Primary School	0	0	48,181	43,407	48,181	43,407
95200 Shefford Church of England Primary School	0	0	13,304	11,980	13,304	11,980
95300 Speenhamland Primary School	0	0	0	0	0	0
95400 Springfield Primary School	0	0	2,230	0	2,230	0
95500 Spurcroft Primary School	0	0	0	0	0	0
95700 St. Finian's Catholic Primary School	-16,347	-2,797	0	0	-16,347	-2,797
97700 St. John the Evangelist Infant & Nursery School	0	0	0	0	0	0
97800 St. Joseph's Catholic Primary School	-14,739	0	0	0	-14,739	0
96200 St. Nicolas Church of England Junior School	-3,001	0	0	0	-3,001	0
96100 St. Pauls Catholic Primary School	-10,366	0	0	0	-10,366	0
96300 Stockcross Church of England Primary School	0	0	5,629	749	5,629	749
96400 Streatley Church of England Voluntary Controlled Primary School	0	0	0	0	0	0
96500 Sulhamstead and Ufton Nerve Church of England Voluntary Aided Primary School	0	0	0	0	0	0
99700 Thatcham Park Church of England Primary School	0	0	9,612	0	9,612	0
96600 Theale Church of England Primary School	0	0	0	0	0	0
96700 Welford and Wickham Church of England Primary School	0	0	15,289	11,104	15,289	11,104
96800 Westwood Farm Infant School	0	0	0	0	0	0
96900 Westwood Farm Junior School	0	0	0	0	0	0
97000 Whitelands Park Primary School	-17,248	0	0	0	-17,248	0
98700 The Willows Primary School	-25,773	-5,132	0	0	-25,773	-5,132
99400 The Winchcombe School	0	0	103,019	87,475	103,019	87,475
97300 Woolhampton Church of England Primary School	0	0	0	0	0	0
97400 Yattendon Church of England Primary School	0	0	23,752	19,654	23,752	19,654
98900 Denefield School	-28,553	0	0	0	-28,553	0
98800 The Downs School	0	0	5,368	0	5,368	0
99000 John O'Gaunt School	0	0	70,541	42,103	70,541	42,103
99100 Kennet School	0	0	0	0	0	0
99200 Little Heath School	0	0	0	0	0	0
99300 Park House School	0	0	0	0	0	0
99800 St. Bartholomew's School	0	0	0	0	0	0
99500 Theale Green School	0	0	0	0	0	0
99900 Trinity School	0	0	0	0	0	0
99600 The Willink School	0	0	0	0	0	0
PRIMARY TOTAL	-201,082	-52,258	487,523	358,948	286,442	306,690
SECONDARY TOTAL	-28,553	0	75,909	42,103	47,356	42,103
TOTAL ALL SCHOOLS	-229,634	-52,258	563,432	401,051	333,798	348,793

Appendix C

2015/16 School Budget Allocations Exemplification Compared to 2014/15 and using 2014/15 Pupil Numbers and Data

Cost Centre	SCHOOL	2014/15 ACTUAL FORMULA (prior to MFG/Capping)			2015/16 FORMULA (prior to MFG/Capping)			Change Before MFG	MFG / (CAP)			Overall Change (inc. Protection)
		Formula Budget	Pupil No's (Oct 2013)	Per Pupil Funding	Formula Budget	Pupil No's (Oct 2013)	Per Pupil Funding		2014/15	2015/16	Change	
95200	Shefford Church of England Primary School	205,080	23	8,916.52	205,080	23	8,916.52	0	13,304	11,980	-1,325	-1,325
95600	Chaddleworth St. Andrew's Church of England Primary School	204,979	23	8,912.12	204,979	23	8,912.12	0	-11	0	11	11
91700	Brimpton Church of England Primary School	254,612	41	6,210.06	254,612	41	6,210.06	0	20,814	18,616	-2,198	-2,198
91300	Beedon Church of England Controlled Primary School	261,712	41	6,383.23	261,712	41	6,383.23	0	10,892	8,729	-2,163	-2,163
92800	Enborne Church of England Primary School	306,896	58	5,291.32	306,896	58	5,291.32	0	-2,852	0	2,852	2,852
92700	The Ilsleys' Primary School	305,406	58	5,265.62	305,406	58	5,265.62	0	152	0	-152	-152
94900	Purley Church of England Infants School	342,195	69	4,959.35	342,195	69	4,959.35	0	-2,304	0	2,304	2,304
93800	Inkpen Primary School	375,072	79	4,747.74	375,072	79	4,747.74	0	5,811	2,031	-3,779	-3,779
97400	Yattendon Church of England Primary School	377,106	82	4,598.85	377,106	82	4,598.85	0	23,752	19,654	-4,098	-4,098
95100	Shaw-cum-Donnington Church of England Primary School	401,127	84	4,775.32	401,127	84	4,775.32	0	48,181	43,407	-4,774	-4,774
96700	Welford and Wickham Church of England Primary School	395,161	87	4,542.08	395,161	87	4,542.08	0	15,289	11,104	-4,185	-4,185
91400	Beenham Primary School	426,022	94	4,532.15	426,022	94	4,532.15	0	0	0	0	0
96400	Streatley Church of England Voluntary Controlled Primary School	419,076	95	4,411.33	419,076	95	4,411.33	0	0	0	0	0
97300	Woolhampton Church of England Primary School	431,463	98	4,402.68	431,463	98	4,402.68	0	0	0	0	0
93500	Hampstead Norreys Church of England Primary School	441,689	101	4,373.16	441,689	101	4,373.16	0	2,425	0	-2,425	-2,425
92300	Curridge Primary School	431,815	101	4,275.40	431,815	101	4,275.40	0	-2,033	0	2,033	2,033
91600	Brightwalton Church of England Aided Primary School	437,168	103	4,244.35	437,168	103	4,244.35	0	0	0	0	0
96500	Sulhamstead and Ufton Nervet Church of England Voluntary Controlled Primary School	441,168	104	4,242.00	441,168	104	4,242.00	0	0	0	0	0
96300	Stockcross Church of England Primary School	446,831	107	4,175.99	446,831	107	4,175.99	0	5,629	749	-4,880	-4,880
92900	Englefield Church of England Primary School	456,326	109	4,186.47	456,326	109	4,186.47	0	4,188	0	-4,188	-4,188
91800	Bucklebury Church of England Primary School	519,086	126	4,119.73	519,086	126	4,119.73	0	-2,507	0	2,507	2,507
91100	Basildon Church of England Primary School	555,464	138	4,025.10	555,464	138	4,025.10	0	0	0	0	0
92200	Compton Church of England Primary School	582,407	145	4,016.60	582,407	145	4,016.60	0	6,496	0	-6,496	-6,496
94200	Kintbury St. Mary's Church of England Primary School	614,843	154	3,992.49	614,843	154	3,992.49	0	42,565	34,786	-7,779	-7,779
91500	Bradfield Church of England Primary School	610,662	157	3,889.57	610,662	157	3,889.57	0	0	0	0	0
93100	Fir Tree Primary School & Nursery	738,463	169	4,369.60	738,463	169	4,369.60	0	0	0	0	0
96800	Westwood Farm Infant School	659,402	169	3,901.79	659,402	169	3,901.79	0	0	0	0	0
95800	Mortimer St. Johns Church of England Infant School	658,725	169	3,897.78	658,725	169	3,897.78	0	-2,908	0	2,908	2,908
94500	Mrs. Bland's Infant & Nursery School	684,217	172	3,978.01	684,217	172	3,978.01	0	0	0	0	0
91000	Aldermaston Church of England Primary School	694,667	177	3,924.67	694,667	177	3,924.67	0	0	0	0	0
97700	St. John the Evangelist Infant & Nursery School	684,291	178	3,844.33	684,291	178	3,844.33	0	0	0	0	0
95900	Cold Ash St. Mark's Church of England Primary School	683,457	183	3,734.74	683,457	183	3,734.74	0	0	0	0	0
92400	Chieveley Primary School	711,113	186	3,823.19	711,113	186	3,823.19	0	0	0	0	0
94600	Pangbourne Primary School	722,578	188	3,843.50	722,578	188	3,843.50	0	0	0	0	0
94300	Lambourn Church of England Primary School	755,555	189	3,997.65	755,555	189	3,997.65	0	0	0	0	0
95700	St. Finian's Catholic Primary School	709,089	190	3,732.05	709,089	190	3,732.05	0	-16,347	0	16,347	16,347
93400	Garland Junior School	755,735	191	3,956.73	755,735	191	3,956.73	0	-1,927	0	1,927	1,927
91900	Burghfield St. Mary's Church of England Primary School	718,701	194	3,704.64	718,701	194	3,704.64	0	-1,218	0	1,218	1,218
94100	Kennet Valley Primary School	772,130	195	3,959.64	772,130	195	3,959.64	0	0	0	0	0
93600	Hemitage Primary School	761,171	202	3,768.17	761,171	202	3,768.17	0	0	0	0	0
97800	St. Joseph's Catholic Primary School	779,275	205	3,801.34	779,275	205	3,801.34	0	-14,739	0	14,739	14,739
92500	Downsway Primary School	787,324	211	3,731.40	787,324	211	3,731.40	0	0	0	0	0
95000	Robert Sandilands Primary School & Nursery	835,615	213	3,923.08	835,615	213	3,923.08	0	424	0	-424	-424
96900	Westwood Farm Junior School	810,228	219	3,699.67	810,228	219	3,699.67	0	0	0	0	0
92100	Calcot Junior School	887,355	228	3,891.91	887,355	228	3,891.91	0	-60,195	0	60,195	60,195
97500	Mortimer St. Mary's Church of England Junior School	824,131	230	3,583.18	824,131	230	3,583.18	0	0	0	0	0
92000	Calcot Infant School & Nursery	914,910	231	3,960.65	914,910	231	3,960.65	0	-18,713	0	18,713	18,713
93900	John Rankin Infant & Nursery School	850,338	232	3,665.25	850,338	232	3,665.25	0	-7,890	0	7,890	7,890
96600	Theale Church of England Primary School	860,032	232	3,707.04	860,032	232	3,707.04	0	0	0	0	0
94000	John Rankin Junior School	871,594	236	3,693.20	871,594	236	3,693.20	0	-11,051	0	11,051	11,051
98700	The Willows Primary School	1,029,293	251	4,100.77	1,029,293	251	4,100.77	0	-25,773	0	25,773	25,773
94700	Parsons Down Infant School	929,297	251	3,702.38	929,297	251	3,702.38	0	5,196	0	-5,196	-5,196
96200	St. Nicolas Church of England Junior School	931,627	253	3,682.32	931,627	253	3,682.32	0	-3,001	0	3,001	3,001
95300	Speenhamland Primary School	988,701	261	3,788.13	988,701	261	3,788.13	0	0	0	0	0
94400	Long Lane Primary School	942,216	263	3,582.57	942,216	263	3,582.57	0	0	0	0	0
99400	The Wincombe School	1,086,851	275	3,952.19	1,086,851	275	3,952.19	0	103,019	87,475	-15,544	-15,544
95400	Springfield Primary School	1,028,763	289	3,559.73	1,028,763	289	3,559.73	0	2,230	0	-2,230	-2,230
94800	Parsons Down Junior School	1,065,084	290	3,672.70	1,065,084	290	3,672.70	0	0	0	0	0
97000	Whitelands Park Primary School	1,160,576	314	3,696.10	1,160,576	314	3,696.10	0	-17,248	0	17,248	17,248
96100	St. Pauls Catholic Primary School	1,165,135	330	3,530.71	1,165,135	330	3,530.71	0	-10,366	0	10,366	10,366
95500	Spurcroft Primary School	1,326,396	373	3,556.02	1,326,396	373	3,556.02	0	0	0	0	0
99700	Thatcham Park Church of England Primary School	1,352,792	382	3,541.34	1,352,792	382	3,541.34	0	9,612	0	-9,612	-9,612
93700	Hungerford Primary School	1,436,849	409	3,513.08	1,436,849	409	3,513.08	0	0	0	0	0
91200	Birch Copse Primary School	1,423,192	417	3,412.93	1,423,192	417	3,412.93	0	0	0	0	0
93000	Falkland Primary School	1,484,878	448	3,314.46	1,484,878	448	3,314.46	0	50,913	29,973	-20,940	-20,940
93200	Francis Baily Primary School	1,779,572	528	3,370.40	1,779,572	528	3,370.40	0	116,631	90,443	-26,187	-26,187
99000	John O'Gaunt Community Technology College	2,123,568	376	5,647.79	2,123,568	376	5,647.79	0	70,541	42,103	-28,438	-28,438
99900	Trinity School & Performing Arts College	3,706,085	700	5,294.41	3,706,085	700	5,294.41	0	0	0	0	0
99300	Park House School	3,864,928	773	4,999.91	3,864,928	773	4,999.91	0	0	0	0	0
99600	The Willink School	3,999,724	821	4,871.77	3,999,724	821	4,871.77	0	0	0	0	0
98900	Denefield School	4,310,226	848	5,082.81	4,310,226	848	5,082.81	0	-28,553	0	28,553	28,553
99500	Theale Green Community School	4,423,358	899	4,920.31	4,423,358	899	4,920.31	0	0	0	0	0
98800	The Downs School	4,279,409	901	4,749.62	4,279,409	901	4,749.62	0	5,368	0	-5,368	-5,368
99800	St. Bartholomew's School	5,896,016	1,239	4,758.69	5,896,016	1,239	4,758.69	0	0	0	0	0
99200	Little Heath School	6,190,421	1,296	4,776.56	6,190,421	1,296	4,776.56	0	0	0	0	0
99100	Kennet School	6,772,142	1,393	4,861.55	6,772,142	1,393	4,861.55	0	0	0	0	0
PRIMARY TOTAL		48,504,684	12,600	3,850	48,504,684	12,600	3,850	0	286,442	358,948	72,506	72,506
SECONDARY TOTAL		45,565,878	9,246	4,928	45,565,878	9,246	4,928	0	47,356	42,103	-5,253	-5,253
TOTAL ALL SCHOOLS		94,070,562	21,846		94,070,562	21,846		0	333,798	401,051	67,253	67,253

Appendix D

Other Funding Allocations

Factor	Further information	Changes for 2015-16
<p>Early years funding This applies to schools or academies with a nursery class</p>	<p>This is paid directly by local authorities to all early years providers, including academies and maintained schools, through the early years single funding formula (EYSFF). Most funding is calculated by multiplying a base rate by the number of hours of provision counted on a termly basis or during the year. For 3 and 4 year olds, there is a mandatory supplement for deprivation and there can be other supplements, such as for quality. Whereas the 5-16 formula uses lagged pupil numbers, early years funding is based on actual hours during the current year.</p>	<p>No changes to the formula, although DSG funding to local authorities for 2 year olds will be based on participation instead of demographic information.</p>
<p>Post-16 mainstream funding</p>	<p>Calculated by the EFA according to a national formula</p>	<p>None</p>
<p>High needs place funding This applies to mainstream schools or academies with a designated special unit or resourced provision.</p>	<p>£10,000 place funding is provided for each agreed pre-16 high needs place. This is paid directly to academies by the EFA, and forms part of the budget share for maintained schools. Post-16 high needs places – in special units, resourced provision or sixth forms – are funded through the national post-16 formula. Funding for academies is paid directly by the EFA. Where place funding is payable to maintained mainstream schools for Post-16 pupils, it forms part of the sixth form grant that the local authority pays to its school sixth forms on behalf of the EFA.</p>	<p>None</p>
<p>High-needs top-up funding</p>	<p>For pre-16 pupils, this is paid directly by the commissioning local authority for high needs pupils where the total cost exceeds the following thresholds. In the case of special units, the cost threshold is £10,000 and includes the costs of all pupils' basic educational entitlement, which is funded through the place funding; if the pupil is not in a unit, the cost threshold is £6,000, which only covers the costs of additional SEN support. Schools are expected to meet any cost of support below these thresholds from their budget allocations. For post-16 pupils, the top-up funding is paid in addition to</p>	<p>None</p>

	the amounts paid to providers through the national post-16 formula.	
Pupil premium	<p>A premium is payable for each pupil who has been eligible for free meals at any time in the last 6 years, or is looked after / adopted from care after 2005, or who has been a service child in the last four years (including children whose parents had died in service and who are in receipt of pensions under the Armed Forces Compensation Scheme (AFCS) and the War Pensions Scheme (WPS)).</p> <p>Allocation is based on the spring census preceding the financial year.</p> <p>Rates for 2014-15 are:</p> <ul style="list-style-type: none"> • £1,300 Primary age pupils • £ 935 Secondary age pupils • £1,900 Looked-after children / adopted from care • £ 300 Service children 	<p>Rates for 2015-16 will be confirmed in due course.</p> <p>An early years pupil premium will be introduced for 3 and 4 year olds.</p>
Education services grant (academies only)	<p>This funding is provided to academies for services previously provided by their local authority – for example, school improvement and asset management.</p> <p>The 2014-15 rate is £140 per pupil, although some protections apply where academies have received a higher level of funding through the former LA Block LACSEG calculations.</p> <p>Local authorities also receive ESG for their maintained school pupils at £113 for each pupil in 2014-15.</p>	<p>Rates for 2015-16 will be confirmed in due course.</p>
Universal infant free school meals grant	<p>This funding is available from September 2014 to provide all infant-age pupils with a free school meal</p>	<p>Rates for 2015-16 will be confirmed in due course</p>

Appendix E

Proposed De-delegations 2015/16

From: The Willink School, Headteacher Mr P Fry

To: Claire White, Schools' Finance Manager. WBDC

Subject: Rationale for exceptional premises costs to be included in the 2015/16 formula funding

Background

For the first time and in financial year 2013/14, West Berkshire District Council (WBDC) changed the way in which it funded the Willink School:

Prior to 1st April 2013, the costs associated with the school's use of the facilities at the Willink Leisure Centre (WLC) were fully met by the Authority. The school was not required to make any contribution to these costs from its operating budget.

The School has use of the Main Sports Hall at the WLC during school hours. The school also has use of the Swimming Pool several times a week in order to fulfil the National Curriculum. In return the School Gym is made available to the WLC after 5pm weekdays, at weekends and during the school holidays.

Hitherto, the school has not made a charge to the WLC (either Parkwood Leisure or WBDC) for the use of the Gym.

Charges made to The Willink School

In the financial year 2013/14 the school was billed as follows for the use of the WLC:

Use of the Facilities*	£27,176
Electricity**	£12,610
Gas**	£15,502
Total	£55,288

*For 2013/14 this was advised as split as follows

Rates	£19,724.74
Insurance	£ 1,705.78
Repair & Maintenance	£ 5,746.44
Total	£27,176.00

**Based on the historical formula used by WBDC the school has been charged 37% of the costs of the WLC's annual bill for these utilities.

The following data shows that the charges levied to the Willink School in 2013/14 fulfil the criteria for exceptional premises costs:

“The current regulations allow for the local authority to make requests to the Education Funding Agency (EFA) to include an exceptional premises factor. The criteria set by the EFA is that the nature of the school premises give rise to significant costs greater than 1% of the school’s total budget allocation...”

Willink School Funding for 2013/14		2013/14 Leisure Centre Costs as a % of Funding
Delegated Funding	£4,027,490	1.37%
Sixth Form Funding	£ 829,700	
Sub Total	£4,857,190	1.14%
SEN Top-up	£ 25,250	
Sub Total	£4,882,440	1.13%
Pupil Premium Grant	£ 98,100	
Total Funding	£4,980,504	1.11%

The Senior Staff and Governors of the Willink School therefore believe that we meet the criteria and request that the exceptional premises factor be included in the 2015/16 funding formula.

Agenda Item 8

West Berkshire Schools' Forum	
Title of Report:	De-delegations 2015-16
Date of Meeting:	29th September 2014
Contact Officer(s)	Ian Pearson & Shannon Coleman-Slaughter
For Decision	

1. Introduction

- 1.1 A number of services which with approval from the School's Forum were centrally provided in financial year 14-15 through the pooling of delegations for maintained schools require review to determine if the pooled arrangements will continue for financial year 15-16. The Primary and Secondary school representatives on the Schools' Forum are required to make this decision for their own phase.
- 1.2 **Appendix A** provides the detail of the likely amounts of de delegation per school for each service. If the Schools' Forum decides to pool some of these services, funding from the maintained schools will be returned to the Local Authority (de delegated) and they will continue to be centrally retained. Academies may be able to choose to buy into such services subject to service provider agreement.
- 1.3 The method of de delegation is on a per pupil basis, other than ethnic minority support which is based on the number of EAL pupils in their first, second or third year at school (data provided by the DfE).

2. Pooling of Services

- 2.1 The services where maintained schools have the option to pool back the funding to continue to be centrally provided on the basis of economies of scale or pooled risk are detailed below. No responses have been received in respect of the de-delegated services from the consultation held with schools and the recommendations shown below have come from the Heads funding Group.
 - a) Behavioural Support **Appendix B**
Includes support for class teachers for individual pupils or groups, and training.
Primary Schools: Pool
Secondary Schools: Pool
 - b) Ethnic Minority Support **Appendix C**
Includes assessment, advice, and support for pupils who speak English as an additional language and those pupils with Gypsy, Roma and Traveller heritage.
Primary Schools: Pool
Secondary Schools: Pool
 - c) Trade Union local representation **Appendix D**
This pays for release of staff as TU representatives, including provision of advice to individual members.
Primary Schools: No decision.
Secondary Schools: No decision.
 - d) Contingency for schools in financial difficulty
The provision of financial support to schools over and above their formula funding.
Primary Schools: Pool.

2.2 No decision could be reached by the Heads Funding Group on the Trade Union Facility time, and a further report has been requested to clarify the options and financial implications of each.

Recommendations:

1. Pooling arrangements for Behavioural Support, Ethnic Minority, and School's in Financial Difficulty (contingency) to continue in 2015/16 (subject to a vote to be taken by each phase)
2. Heads Funding Group to consider a further report on Trade Union Facility time and bring a recommendation to the next meeting of the Schools' Forum

Appendices

Appendix A – provides an indication of the likely de-delegations

Appendix B – Behaviour Support Services Proposal 2015-16

Appendix C – Ethic Minority and Travellers Service Proposal 2015-16

Appendix D – Trade Union Representation Proposal 2015 - 16

Appendix A: Proposed De-delegations 2015/16

Cost Centre	School	DeDelegations from April 2015						
		Data		Behaviour Support	Ethnic Minority Support	Trade Union Representation	Contingency Financial diff	TOTAL
		Pupil No's	EAL Pupils	Pupil No's	EAL Pupils	Pupil no's	Pupil No's	
		Method: Primary £: Sec'y £:		£15.21	£423.35	£3.12	£9.53	
				£8.08	£1,393.75	£5.30	£9.53	
91000	Aldermaston Church of England Primary School	177	6	2,692	2,386	552	1,687	7,318
91100	Basildon Church of England Primary School	138	0	2,099	0	431	1,315	3,845
91300	Beedon Church of England Controlled Primary School	41	0	624	0	128	391	1,142
91400	Beenham Primary School	94	1	1,430	504	293	896	3,123
91200	Birch Copse Primary School	417	4	6,343	1,484	1,301	3,974	13,101
91500	Bradfield Church of England Primary School	157	0	2,388	0	490	1,496	4,374
91600	Brightwalton Church of England Aided Primary School	103	1	1,567	501	321	982	3,371
91700	Brimpton Church of England Primary School	41	0	624	0	128	391	1,142
91800	Bucklebury Church of England Primary School	126	1	1,916	485	393	1,201	3,995
91900	Burghfield St. Mary's Church of England Primary School	194	4	2,951	1,530	605	1,849	6,935
92000	Calcot Infant School & Nursery	231	28	3,514	11,760	721	2,201	18,196
92100	Calcot Junior School	228	7	3,468	2,963	711	2,173	9,316
95600	Chaddleworth St. Andrew's Church of England Primary School	23	0	350	0	72	219	641
92400	Chieveley Primary School	186	4	2,829	1,505	580	1,773	6,687
95900	Cold Ash St. Mark's Church of England Primary School	183	2	2,783	993	571	1,744	6,092
92200	Compton Church of England Primary School	145	2	2,205	1,040	452	1,382	5,080
92300	Curridge Primary School	101	1	1,536	491	315	963	3,305
92500	Downs Way Primary School	211	5	3,209	1,963	658	2,011	7,842
92800	Enborne Church of England Primary School	58	1	882	512	181	553	2,127
92900	Englefield Church of England Primary School	109	2	1,658	992	340	1,039	4,029
93000	Falkland Primary School	448	12	6,814	5,210	1,398	4,269	17,692
93200	Francis Baily Primary School	528	19	8,031	7,965	1,647	5,032	22,675
93400	Garland Junior School	191	2	2,905	847	596	1,820	6,168
93500	Hampstead Norreys Church of England Primary School	101	0	1,536	0	315	963	2,814
93600	Hermitage Primary School	202	2	3,072	977	630	1,925	6,605
93700	Hungerford Primary School	409	7	6,221	3,074	1,276	3,898	14,468
92700	The Ilsleys' Primary School	58	0	882	0	181	553	1,616
93800	Inkpen Primary School	79	0	1,202	0	246	753	2,201
93900	John Rankin Infant & Nursery School	232	16	3,529	6,727	724	2,211	13,191
94000	John Rankin Junior School	236	6	3,590	2,584	736	2,249	9,159
94100	Kennet Valley Primary School	195	23	2,966	9,946	608	1,858	15,379
94200	Kintbury St. Mary's Church of England Primary School	154	1	2,342	509	480	1,468	4,800
94300	Lambourn Church of England Primary School	189	8	2,875	3,457	590	1,801	8,723
94400	Long Lane Primary School	263	7	4,000	2,867	821	2,506	10,194
95800	Mortimer St. Johns Church of England Infant School	169	10	2,570	4,174	527	1,611	8,882
97500	Mortimer St. Mary's Church of England Junior School	230	2	3,498	847	718	2,192	7,255
94500	Mrs. Bland's Infant & Nursery School	172	8	2,616	3,280	537	1,639	8,072
94600	Pangbourne Primary School	188	4	2,859	1,521	587	1,792	6,759
94700	Parsons Down Infant School	251	15	3,818	6,251	783	2,392	13,243
94800	Parsons Down Junior School	290	13	4,411	5,504	905	2,764	13,583
94900	Purley Church of England Infants School	69	10	1,049	4,260	215	658	6,182
95000	Robert Sandilands Primary School & Nursery	213	21	3,240	8,870	665	2,030	14,804
95100	Shaw-cum-Donnington Church of England Primary School	84	0	1,278	0	262	801	2,340
95200	Sheffield Church of England Primary School	23	1	350	464	72	219	1,104
95300	Speenhamland Primary School	261	34	3,970	14,227	814	2,487	21,498
95400	Springfield Primary School	289	8	4,396	3,481	902	2,754	11,533
95500	Spurcroft Primary School	373	16	5,673	6,843	1,164	3,555	17,235
95700	St. Finian's Catholic Primary School	190	0	2,890	0	593	1,811	5,293
97700	St. John the Evangelist Infant & Nursery School	178	12	2,707	5,066	555	1,696	10,025
97800	St. Joseph's Catholic Primary School	205	22	3,118	9,423	640	1,954	15,134
96200	St. Nicolas Church of England Junior School	253	10	3,848	4,234	789	2,411	11,282
96100	St. Pauls Catholic Primary School	330	59	5,019	25,177	1,030	3,145	34,370
96300	Stockcross Church of England Primary School	107	1	1,627	498	334	1,020	3,479
96400	Strealey Church of England Voluntary Controlled Primary School	95	2	1,445	993	296	905	3,640
96500	Sulhamstead and Ufton Nervet Church of England Voluntary Aided Prima	104	0	1,582	0	324	991	2,897
99700	Thatcham Park Church of England Primary School	382	10	5,810	4,030	1,192	3,640	14,673
96600	Theale Church of England Primary School	232	8	3,529	3,455	724	2,211	9,918
96700	Welford and Wickham Church of England Primary School	87	1	1,323	498	271	829	2,922
96800	Westwood Farm Infant School	169	10	2,570	4,209	527	1,611	8,917
96900	Westwood Farm Junior School	219	4	3,331	1,619	683	2,087	7,721
98700	The Willows Primary School	251	38	3,818	15,991	783	2,392	22,984
99400	The Wincombe School	275	39	4,183	16,484	858	2,621	24,146
97300	Woolhampton Church of England Primary School	98	0	1,491	0	306	934	2,730
97400	Yattendon Church of England Primary School	82	0	1,247	0	256	781	2,285
98800	The Downs School	901	1	7,280	1,394	4,775	8,587	22,036
99000	John O'Gaunt Community Technology College	376	1	3,038	1,394	1,993	3,583	10,008
99200	Little Heath School	1,296	8	10,472	11,167	6,869	12,351	40,859
99600	The Willink School	821	4	6,634	5,582	4,351	7,824	24,391
98900	Benfield School	848	14	6,852	19,513	4,494	8,081	38,940
93100	Fir Tree Primary School & Nursery	169	21	2,570	8,688	527	1,611	13,396
99100	Kennet School	1,393	6	11,255	8,209	7,383	13,275	40,123
99300	Park House School	773	16	6,246	22,358	4,097	7,367	40,067
99800	St. Bartholomew's School	1,239	8	10,011	11,159	6,567	11,808	39,544
99500	Theale Green Community School	899	1	7,264	1,378	4,765	8,567	21,975
99900	Trinity School & Performing Arts College	700	20	5,656	28,143	3,710	6,671	44,180
97000	Whitelands Park Primary School	314	8	4,776	3,311	980	2,992	12,060
PRIMARY TOTAL		12,117	531	184,300	224,670	37,805	115,475	562,250
SECONDARY TOTAL		3,394	14	27,424	19,537	17,988	32,345	97,293
ACADEMY TOTAL		6,335	86	54,631	102,759	32,523	60,373	250,285
TOTAL ALL SCHOOLS		21,846	630	266,354	346,966	88,316	208,192	909,828

West Berkshire Schools' Forum	
Title of Report:	Behaviour Support Pooled Budget Proposal Financial Year 15-16
Date of Meeting:	29th September 2014
Contact Officer(s)	Cathy Burnham

1. Background

- 1.1 From financial year 12-13, Behaviour Support Services have been subject to annual agreement to pool funding for both primary and secondary schools.
- 1.2 This report sets out the details of the work undertaken by the Behaviour Support Team and the budget requirement for the service in financial year 15-16.

2. The Behaviour Support Team

Primary: Penny Tripp	0.5fte
Janet Norbury	0.5fte
Angela Brand	0.5fte
Secondary: Dave Glare	0.5fte (retired April 2014) 0.1fte vacancy
Manager: Darren Suffolk	0.4fte
Admin assistant: Piyush Bharania	0.4fte

Temporary cover for the Secondary post has been arranged. The cover teacher is required to undertake research on the factors affecting successful transition of BESD pupils from primary to secondary school, with analysis of those yr 7 & 8 pupils who were permanently excluded subsequently. This will inform good practice guidelines on transition of BESD pupils and alert schools and LA to gaps in provision.

3. Nature of Work Undertaken

- 3.1 The following table details the work undertaken by the Behaviour Support Service to support schools.

Type of work (primary) delivered
Work with class teacher around an individual pupil
Work with teacher around a class or group
Whole school work
Attending network meetings
Training for whole school
Training for cluster of schools

Central training or conference
NQT training
Mid- day supervisor training
TA training
Work with parents
Training for governors
Risk assessments
Secondary work delivered
Work with individual students
Reintegration meetings
Work with parents
Support for Heads of Yr, pastoral staff

3.2 The following table details the number of sessions undertaken by the team over financial year 13-14.

Primary support team	School visits approx	Schools receiving a visit	Training sessions delivered	Pupils referred approx	Class teacher contacts	Parent contacts
2013-14 terms 1-6	367	61	106	195	288	183
2013/14 Terms 1-4 only	200	60	88	109	138	102

NB. Due to serious illness two out of three teachers were absent for the whole of terms 1&2. Some cover was provided, a consultation phone-line set up for schools but fewer school visits were possible. Both teachers are now back working and terms 5&6 should reflect usual patterns of visits and contacts.

3.3 Exclusions in primary and secondary schools were as follows:

Primary permanent exclusions (terms 1-4 2013/14)	1
Secondary exclusions (terms 1-4 2013/14)	14

3.4 All training courses undertaken in year were all evaluated as good or excellent. Courses are listed below.

The following sessions were delivered:

- Attachment theory
- Low level disruption
- Positive behaviour strategies
- NQT modules
- SEN TA modules
- Positive parenting
- Draw and talk
- SDQ
- High End challenging behaviours
- Emotional development
- SEAL
- ADHD

- R time
- Behaviour 'tasters'
- Managing Feelings
- Making Lunchtimes Work
- Self Harm
- Peer mediation

4. Summary

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

The number of requests for support and referrals are increasing.

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

The majority of school Ofsted inspections report behaviour as good.

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

5. Budget Requirement Financial Year 2015-16

The 2015/16 anticipated budget requirement is £212k for maintained primary and secondary schools. This is broken down as follows:

Maintained Primary School Services £185Kk

Maintained Secondary School Services £27Kk.

West Berkshire Schools' Forum	
Title of Report:	Ethnic Minority & Travellers Support Service (EMTAS) Budget Proposal 2015-16.
Date of Meeting:	29th September 2014
Contact Officer(s)	Maxine Slade

1. Background

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

2. The EMTAS Team

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

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

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

- 2.3 The Learning Support Adviser is responsible for providing support to schools. This includes:
- Carrying out the English language assessments for new arrivals. West Berkshire assessment requests have remained steady at approximately 125 per academic year.
 - Providing assessment reports with recommendations and guidance for classroom teachers.
 - Tracking the attainment of GRT pupils termly.
 - Support and guidance to schools with GRT pupils and managing the GRea121T project which trains teaching assistants to work on short term intensive programmes of learning to enable GRT pupils to narrow the gap in attainment with their peers.

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

3. Work Undertaken

3.1 Number of EAL assessments completed in the last three years

In the academic year of 2011/12, 82 assessments were carried out in 53 primary schools, all of the secondary schools, both nurseries and both special schools. In 2012/13 135 assessments were carried out in 37 primary schools and 8 secondary schools. So far in the current academic year 2013/14 124 assessments have been carried out in 36 primary schools and 5 secondary schools. This number will continue to rise during the rest of the term to approximately 135 in line with figures for last year. The autumn term saw the highest number of new arrivals since the service provision came into West Berkshire with 86 new arrivals entering West Berkshire schools with English as an additional language in one term.

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

PSO (Bengali/Hindi)

11 pupils in the following schools this year:

The Winchcombe (1)	The Willows (4)
Victoria Park Nursery (4)	Compton School & Pre-school (1)
St. John the Evangelist (1)	

Schools have also received assistance with first language assessments, CAF completion, SEN issues and parental interviews in many other settings.

PSO (Polish/Spanish)

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

St. Nicolas (1)	St. Joseph's (1)
Long Lane Primary (2)	The Winchcombe (1)
Parsons Down Infant (1)	Kennet Valley (1)
Speenhamland (2)	John O'Gaunt (1)
Purley Infants (2)	Long Lane (2)
The Willows (5)	St. John the Evangelist (1)
Brookfields (1)	Calcot Infants (1)

EMTAS has provided support for 5 GCSE Polish examinations this year and 2 AS Levels at Kennet School, Trinity and The Downs. Little Heath has students who are confirmed to take the GCSE in 2015.

PSO (UASC)

4 students from Eritrea, SE Asia and Albania who are all Looked After Children are being educated at Park House and St. Bart's. EMTAS provides academic and pastoral support in lessons and in tutor time. This PSO also attends Personal Education Planning meetings, liaising with SENCOs, Social Workers, Heads of Year, Connexions and LACES members.

Summary of PSO work

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

21

Number of TA funded hours given to schools hours

2011/12	2012/13	2013/14
660 hours	735 hours	910 hours (£7289.10) EAL
380 hours of TA funding for pupils moving from FS2 to Yr 1	360 hours of TA funding for pupils moving from FS2 to Year 1	255 hours (£2042) GRT
		This figure is likely to rise further this term. It will also include further transition work from FS2 to Y1 which will be approximately 18 pupils with 360 hours of TA support (£2883)
		Total 1525 hours (£12,215)

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

Garland Junior	Hungerford
Aldermaston	Chaddleworth & Shefford
Mrs Bland's Infant	Whitelands Park
Mortimer St Mary Junior	The Willink

3.3 Number of training sessions (both general and school specific)

General courses

2011/12	2012/13	2013/14
New Arrivals with EAL	New Arrivals with EAL	New Arrivals with EAL
NQT	NQT	SCITT
Equality Act: Heads/SIAs	GTP	GTP
GTP	EY Quality team and preschool counsellors	Raising attainment EYFS children with EAL
Global education: Olympic Games		Equality Act briefings

School INSET

2011/12	2012/13	2013/14
Long Lane (9) TAs	Curridge (all staff)	Denefield EAL- 2 sessions (Teachers/TAs)
Lambourn (7) TAs	St Joseph's (all staff)	The Willows - 4 sessions (Teachers/TAs)
MSJ: group (7) TAs	The Willows (TAs)	Kennet Valley – GRT (teachers)
Winchcombe Foundation stage (6) EAL	Chieveley (TAs)	St. Joseph's - Advanced EAL learners (Teachers/TAs)
SUN School (6) GRT		Parsons Down Infants (TAs)
The Downs School GRT Q & A (16)		Thatcham Park (TAs)
Brookfields EAL & Diversity (48)		John Rankin Juniors (TAs)
St. Joseph's		

Teachers (12) EAL		
St. Joseph's TAs (10)		

3.4 Number of families supported by PSO (GRT)

Approximately 28 families 11/12 and 12/13 and work has continued this year with new families being ascribed to GRT status. As a result, the service has provided support for nearly 40 families. Transition support has been provided between schools and also when pupils have been transferring from out of West Berkshire into our schools. This work is 'in year' changes as well as end of Key Stage transitions. Children from Circus families have been supported in accessing education whilst in the LA

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

+

3.5 Number of schools supported with GRT pupils

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

Aldermaston	Sulhamstead and Ufton Nervet
Calcot Infants	Chaddleworth & Shefford
Garland Junior	Thatcham Park
Hermitage	Whitelands Park
Hungerford	The Castle
Kennet Valley	The Willink
Mortimer St Mary's Junior	Yattendon
Mortimer St John's Infants	Kennet
Mrs Bland's Infants	The Willows
John O'Gaunt	Francis Baily
Lambourn	Spurcroft

3.6 Total number of schools receiving (or have received) GRT, bilingual or UASC PSO support: 48 schools

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

Adventure Dolphin Day 2013 – 24 GRT boys and girls from 8 years up to 16 yrs attended.

Oxenwood Day 2013 – 28 GRT boys and girls attended.

The activity days included children from both West Berkshire Traveller sites, plus housed Travellers and visiting families who were travelling and staying on the transit site. Some of the children's parents and grandparents attended which enabled the team to further develop positive relationships with the community.

3.8 Number of pupils attending the Autumn 2012 Michaelmas Fair School

23 pupils over three days ranging from 4 to 14 years (including one child on the autistic spectrum and 2 profoundly deaf) attended the school and carried out a project on the local area alongside receiving support with their long distance learning packs.

Feedback from parents and Northcroft Leisure Centre staff was 100% positive. The fair did not operate in 2013 but should be back for Autumn 2014. This is booked to be repeated using the facilities at Northcroft this autumn.

3.9 Number of sessions run by the Learning Bus

11 sessions have been delivered from September 2013 to July 2014 on the Learning Bus that has been taken to one of the West Berkshire Traveller sites. These sessions have enabled Children's Centre staff, schools and other agencies to make contact with 'hard to reach' families through working alongside EMTAS. As a result of this work, more families have taken up early years provision and have developed better working relationships with local school staff. This is enabling parents to feel confident in approaching the schools and attending education drop in sessions etc.

4. Additional Requirement for Portuguese Support in Schools

4.1 Portuguese has been in the top three languages of new arrivals to West Berkshire every year for the last six years. This year 13/14 it is the second most spoken language after Polish. Portuguese children underachieve nationally. Children start school later in Portugal and often arrive here into Yr 1, 2 and 3 with no formal schooling. Parents are generally (not always) in low paid, manual jobs and are working long hours. They are often living in over-crowded housing.

4.2 The children, families and schools would benefit from having a Portuguese PSO to provide support in class, raise attainment, develop English and liaise with parents. West Berkshire is providing this service to Polish children and Portuguese children should have the same equality of opportunity.

5. Financial Year 2015-16 Budget Requirement

The 2015/16 anticipated delegations on a school by school basis using pupil EDL numbers are as follows:

Maintained Primary Schools £225k
Maintained Secondary Schools £20k

The above figures are inclusive of provision of services to children with Roma, Gypsy and Traveller heritage.

West Berkshire Schools' Forum	
Title of Report:	Trade Union Facilities Budget <ul style="list-style-type: none"> • current position 2014/15 • recommendation for 2015/16
Date of Meeting:	29th September 2014
Contact Officer(s)	Robert O'Reilly (Head of HR)

1. Background

- 1.1. West Berkshire Council has a school trade union facilities agreement which includes provision for compensating individual schools for release time for teacher trade union representatives they employ. Compensation is paid from the dedicated schools grant (DSG).

- 1.2. Union representatives attend joint consultation meetings with the authority and meetings with head teachers and HR on a variety of employee relations matters. The latter includes TUPE consultation meetings where schools converted to academy status; consultation on reorganisations of teaching and support staff (note: NASUWT and ATL represent non teaching staff; NUT only represents teachers); disciplinary issues; grievances; ill health cases; capability cases; and settlement agreements.

- 1.3. If there was no centrally funded facilities agreement at local authority level, schools, HR and union members would need to rely on full time (regional) officials of the relevant unions for consultation and representation purposes.

- 1.4. The Schools Forum oversees spending on the DSG and must make an annual determination whether to pool the budgets for primary and secondary schools to continue to provide a central fund for compensating employer schools for releasing trade union representatives for official duties.

- 1.5. It should be noted that the Department for Education (DfE) has recently published [non-statutory guidance on facilities time in schools](#). This guidance expects clear accountability for time spent on TU duties; an evaluation of value for money; that TU reps should be practicing teachers who spend at least 50% of their time in the classroom; and that it should be possible for union reps to fulfil their main union duties in one day a week or less.

- 1.6. The current position in 2014/15 is that two of the union representatives (NUT and ATL) spend 100% of their contracted time on trade union duties, having retired from full time teaching.
- 1.7. Currently some academies are using their allocation for trade union facilities time to set up school based consultative arrangements, rather than 'buying in' to local authority arrangements. This might be the preferred model for all secondary schools in the future with de-delegation and funding of release time for representatives to undertake union duties in another WBC school to be confined to the Primary sector.

2. Payments for Trade Union Time Financial Year 2015/16

- 2.1. The current formula for allocating funding to compensate schools who release trade union representatives to carry out their union duties does so on the basis of the actual salary of the representative. Application of this formula led to an overspend in 2013/14 of 25% against the budget allocated by the Schools' Forum for the year. The allocation of funding for 2014/15, to avoid further overspend, is the subject of ongoing discussion with the trade unions.
- 2.2. It is proposed to change the formula for allocating compensation costs to schools which employ trade union representatives. This will be the subject of consultation with the trade unions before final agreement.
- 2.3. For information, the proposed formula is as follows;
- *Schools should be reimbursed at the rate of the cost of a supply teacher for the release time required for teachers to attend to official trade union business.*
 - *A flat rate of 5 supply days should be allocated per union to cover work such as attendance at joint consultation meetings of the Council.*
 - *34 supply days should be allocated for the national role undertaken by the NASUWT representative (one day per week for 34 weeks). This will be removed from the formula if the current representative ceases to hold the national role.*
 - *Additional supply days should be allocated per union member at the rate of 0.08 days per member.*
- 2.4. In 2015/16 this formula results in an overall allocation of the equivalent of one full time equivalent supply teacher. If membership numbers change from year to year, the overall budget requirement will change. If the NASUWT representative ceases his national role, this will reduce the overall allocation required and reduce the budget requirement.

2.5. The modelled budget requirement for financial year 2015/16 based on schools being reimbursed at the rate of a standard supply teacher using the proposed formula is as follows:

- Maintained Primary Schools budget requirement financial year 2015-16 **£38k**
- Maintained Secondary Schools budget requirement financial year 2015-16 **£18k**

3. Decisions for the Schools' Forum

3.1. The Forum should determine whether to pool the de-delegated budgets to provide a central fund for trade union facilities for teachers for 2015/16 for;

3.1.1. Maintained Primary schools; and

3.1.2. Maintained Secondary schools.

It should be noted that if a decision is been made to discontinue pooling arrangements, it would be almost impossible to reverse that decision at a later date. Therefore the Forum needs to be aware that a decision to cease pooling arrangements for this budget would effectively be perm

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West Berkshire Schools' Forum	
Title of Report:	Additional Funding Criteria Proposals
Date of Meeting:	29th September 2014
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, four circumstances where the local authority can provide additional funding.

1.2 There are 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.

1.3 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.

1.4 In addition, the Schools' Forum may agree to de-delegate funding for schools in financial difficulty. There needs to be agreed criteria on how this funding is to be determined and allocated to schools.

1.5 Finally, the local authority can use funding from its high needs block to allocate additional funding to schools which have a disproportionate number of high needs pupils. This has to be determined by a formulaic method.

1.6 In 2014/15 West Berkshire holds funds for each of these four circumstances and the current criteria for each are attached as appendices. These now need to be reviewed and amended where appropriate following experience in using

each during the past year, any further guidance from the DfE, and any comments received from the recent consultation with schools.

1.7 Schools' Forum is required to agree the criteria for 2015/16 and be consulted on the total sum to be top sliced from the DSG. The Heads' funding Group (HFG) reviewed each fund at its meeting on 18th September and this report contains their recommendations.

2. Growth Fund

2.1 Appendix A sets out the current circumstances and the criteria used to allocate additional funding from the growth fund. In 2014/15 £250,000 has been top sliced from the DSG to cover these circumstances.

2.2 Once the October 2014 census data is available, this will be used to assess which schools meet each of the circumstances, so it is unknown at the moment how much of the fund is required in the current year, and how easy it is to assess whether the set criteria has been met. It is proposed therefore to keep the fund the same for 2015/16.

2.3 The current criteria and funding allocations used by West Berkshire are similar to the best practice examples provided by the DfE. The only circumstance missing is to support diseconomies of scale (towards fixed costs) when a new school opens without a full complement of year groups. It is proposed that where a new school opens and is less than 90% full, a payment of £1,000 per percentage point below capacity is made, up to a maximum of £80,000 (i.e. 20% full) e.g. a school opening at 40% full will receive an additional lump sum of £60,000, and a school opening 82% full will receive an additional lump sum of £18,000. This is payable for the first two years only.

2.4 The recommendation from HFG is that the criteria and funding allocation remains the same for 2015/16, but with the addition of funding diseconomies of scale for new schools opening as set out in the paragraph above.

3. Falling Rolls Fund

3.1 Appendix B sets out the current criteria used to allocate additional funding from the falling rolls fund. £120,000 has been top sliced from the DSG for this fund in 2014/15.

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 In the good practice examples provided by the DfE there were none which provided clearer or simpler criteria than the current West Berkshire one. They used a surplus capacity percentage of between 15% and 20% (compared to the West Berkshire trigger point of 10%) and a requirement for between 50% and 90% of the surplus places within the next 3 years (compared to the West Berkshire requirement of 50%). Some local authorities take into account

schools receiving minimum funding guarantee or their surplus year end balance when determining the funding allocation.

- 3.4 No payments have been made to date as pupil numbers from the October 2014 census are required. Using the previous year's data, no school would be eligible. This is because school rolls are generally rising (other than schools where there has not been a good OFSTED so wouldn't be eligible anyway). Good or outstanding schools with surplus capacity are generally growing with many having had their admission number increased (hence the surplus capacity) to accept the additional growth in numbers on an annual basis (these schools will benefit from the growth fund rather than this fund).
- 3.5 The recommendation from HFG is to keep the current criteria but reduce the fund to £40,000 on the off chance that a school may qualify for such funding in the future e.g. following temporary movement of military troops.

4. Funding for Primary Schools in Financial Difficulty

- 4.1 So far in the current financial year two schools have applied for additional funding and after following the guidelines and application process (Appendix C) have been successful in obtaining funding and reducing/eradicating their deficit.
- 4.2 The criteria and exceptional circumstances as listed have been able to be verified by a combination of schools accountancy carrying out a detailed review of the budget plan, and HFG acting as a panel to scrutinise the application and question the schools on their particular circumstances and future plans.
- 4.3 An additional requirement introduced by HFG is for the school (via schools accountancy for consistency) to provide the latest benchmarking information as additional evidence.
- 4.4 The recommendation from HFG is that the criteria remain the same for 2015/16 but with the addition of specified benchmarking information to be provided with each application.

5. Additional SEN Funding

- 5.1 The current criteria as detailed in Appendix D provides additional funding of £6,000 per additional high needs pupil to schools where the number of high needs pupils is greater than 2% in primary schools and 4% in secondary schools. It is calculated by rounding up to whole pupil numbers, and the actual numbers are reviewed each term with pro rata funding for pupils not in the school for the full financial year.
- 5.2 Under this methodology four schools have received funding so far in this financial year.
- 5.3 The DfE has provided examples from a number of local authorities which includes the methodology used by West Berkshire. Other options for 2015/16 were considered by HFG as follows, and detailed in Appendix E:

- As current but funding to be proportionate rather than based on the rounded up pupil number (option B).
- Using the actual average percentage of high needs pupils in the local authority per primary and secondary sector plus 1% as the trigger for additional funding (option C).
- Funding the difference between the actual notional SEN budget the school has received and the actual number of high needs pupils multiplied by £6,000 if there is a shortfall (option D).

5.4 The recommendation from HFG is to use Option C from 2015/16 as this is deemed to be the fairest method – there are no cliff edges where a school may just lose out on funding due to the rounding up method, and it better reflects the latest actual average of high needs pupils in each sector within West Berkshire.

5.5 Concern was expressed at HFG about funding shortfalls (particularly in very small primary schools) for pupils with additional needs but who are not high needs. However the only method of funding these pupils is through the prescribed notional SEN budget, and regulations do not allow further top ups to funding such pupils beyond this.

Recommendation: Agree for each fund the criteria and funding to be set aside for 2015/16, as set out in this report

Appendices

Appendix A – Growth Fund Criteria 2014/15

Appendix B – Falling Rolls Fund Criteria 2014/15

Appendix C – Funding for Primary Schools in financial difficulty 2014/15

Appendix D – Additional SEN Funding 2014/15

Appendix E – Models for Additional SEN Funding 2015/16

Appendix A

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

Background

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.
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.
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.
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.
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.
6. The criteria and funding as agreed by the Schools' Forum at its meeting on 7th October 2013 is set out below.

Falling Rolls Criteria

1. School must have been judged good or outstanding at their last OFSTED inspection.
2. Surplus capacity exceeds 10% of the published total school capacity.
3. Local planning data shows a requirement for at least 50% of the surplus places within the next 3 years
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.
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.

Funding to be Top sliced from DSG

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

- a. Number of schools that may possibly meet the criteria 3 x £40,000 = £120,000
- b. 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.
- c. 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.

Funding for Primary Schools in Financial Difficulty

Background

1. Under School funding reform, from April 2013 local authorities have been required to delegate to all schools the contingency previously held for schools in financial difficulty. Each phase in the maintained sector has the option of de-delegating this funding to continue to have this funding centrally retained.
2. At the Schools' Forum meeting held on 7th October 2013, the primary school members of the Forum opted to continue to de-delegate this funding in 2014/15. The amount totals £115,470 in 2014/15.
3. The Schools' Forum is required to set clear criteria for the allocation of this funding, and the criteria agreed by the Schools' Forum at its meeting on 21st January 2013 remains for 2014/15.

Contingency for Schools' In Financial Difficulty Criteria (Maintained Primary Schools Only)

If a school has a deficit budget it may be allocated additional support funding. If a school can meet the following criteria, a bid for additional funding can be made by the school to be considered by the Schools' Forum:

1. The school has sought and followed the advice of the Schools' Finance Advisor prior to going into deficit
2. The school has (up to) a five year robust deficit recovery plan in place which has been discussed with and verified by the Schools' Finance Advisor.
3. Additional funding may be payable for one of the following exceptional unforeseen circumstances which has taken the school into deficit:
 - Payment to maintain current staffing levels to help cover a temporary downturn in pupil numbers, and evidence can be provided that the numbers are likely to recover within a 2 - 3 year period making downsizing of staff and resultant redundancy costs unreasonable.
 - Payment to maintain current staffing levels on a temporary basis in a school causing concern (i.e. Ofsted category of notice to improve or worse), where to reduce the staffing would be detrimental to the recovery of standards in the short term.
 - Payment to cover staffing costs during a short term interim period whilst restructuring takes place due to an unforeseen sudden permanent downturn in pupil numbers
 - Redundancy payments, where the redundancies are required in order to balance the budget over a 3 – 5 year period, but these costs will put the school further into deficit if not met (as per the Severance Funding Policy).

In order to access this funding, a school will need to present in person (with the support of the Schools' Accountant) a case to a panel as agreed by Primary Heads, who after consideration of the case, will recommend the amount and duration of the financial support to Schools' Forum for approval or not.

Additional SEN Funding 2014/15

Background

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 in mainstream classes to be provided from a schools SEN formula funding due to an exceptional number of such pupils on roll.
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.
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.
4. The Schools' Forum agreed the methodology at its meeting on 7th October 2013, and this is set out below.

Methodology and Process

1. There will be an additional payment to schools where the actual number of high needs pupils is significantly above the average.
2. Where the actual number of high needs pupils (i.e. pupils in mainstream receiving top ups) 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.
3. 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. This methodology is 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.
4. The initial calculation will be carried out at the end of March 2014 based on the actual number of pupils receiving top ups at that time. Payment will be made in April 2014 for the full financial year . It will then be recalculated at the end of each term for any additional high needs pupils the school may have admitted, and adjustments made for any leavers (pro rata funding adjustments will be made).

Provisional 2014/15 Additional SEN Funding for Schools with Disproportionate large numbers of High Needs Pupils

Cost Centre	SCHOOL	No.s (Oct 2013 Census excl RU)	Pupil No.s Receiving Top Ups Jan 2014	No. of Pupils Formula Funded	No. Add'l Top Up Pupils	£6,000
	Primary			2.00%		
	Secondary			4.00%		
91000	Aldermaston Church of England Primary School	177	3	4	0	0
91100	Basildon Church of England Primary School	138	2	3	0	0
91300	Beedon Church of England Controlled Primary School	41	0	1	0	0
91400	Beenham Primary School	94	1	2	0	0
91200	Birch Copse Primary School	417	4	9	0	0
91500	Bradfield Church of England Primary School	157	1	4	0	0
91600	Brightwalton Church of England Aided Primary School	103	1	3	0	0
91700	Brimpton Church of England Primary School	41	3	1	2	12,000
91800	Bucklebury Church of England Primary School	126	2	3	0	0
91900	Burghfield St. Mary's Church of England Primary School	194	4	4	0	0
92000	Calcot Infant School & Nursery	231	0	5	0	0
92100	Calcot Junior School	228	4	5	0	0
95600	Chaddleworth St. Andrew's C of E Primary School	23	0	1	0	0
92400	Chieveley Primary School	186	2	4	0	0
95900	Cold Ash St. Mark's Church of England Primary School	183	3	4	0	0
92200	Compton Church of England Primary School	145	0	3	0	0
92300	Curridge Primary School	101	0	3	0	0
92500	Downsway Primary School	211	6	5	1	6,000
92800	Enborne Church of England Primary School	58	0	2	0	0
92900	Englefield Church of England Primary School	109	1	3	0	0
93000	Falkland Primary School	448	6	9	0	0
93100	Fir Tree Primary School & Nursery	169	1	4	0	0
93200	Francis Baily Primary School	528	6	11	0	0
93400	Garland Junior School	191	3	4	0	0
93500	Hampstead Norreys Church of England Primary School	101	2	3	0	0
93600	Hermitage Primary School	202	3	5	0	0
93700	Hungerford Primary School	409	3	9	0	0
92700	The Ilsleys' Primary School	58	1	2	0	0
93800	Inkpen Primary School	79	0	2	0	0
93900	John Rankin Infant & Nursery School	232	4	5	0	0
94000	John Rankin Junior School	236	3	5	0	0
94100	Kennet Valley Primary School	195	2	4	0	0
94200	Kintbury St. Mary's Church of England Primary School	154	7	4	3	18,000
94300	Lambourn Church of England Primary School	189	3	4	0	0
94400	Long Lane Primary School	263	2	6	0	0
95800	Mortimer St. Johns Church of England Infant School	169	0	4	0	0
97500	Mortimer St. Mary's Church of England Junior School	230	6	5	1	6,000
94500	Mrs. Bland's Infant & Nursery School	172	0	4	0	0
94600	Pangbourne Primary School	188	4	4	0	0
94700	Parsons Down Infant School	251	3	6	0	0
94800	Parsons Down Junior School	290	5	6	0	0
94900	Purley Church of England Infants School	69	1	2	0	0
95000	Robert Sandilands Primary School & Nursery	213	3	5	0	0
95100	Shaw-cum-Donnington Church of England Primary School	84	2	2	0	0
95200	Shefford Church of England Primary School	23	0	1	0	0
95300	Speenhamland Primary School	261	4	6	0	0
95400	Springfield Primary School	289	2	6	0	0
95500	Spurcroft Primary School	373	1	8	0	0
95700	St. Finian's Catholic Primary School	190	2	4	0	0
97700	St. John the Evangelist Infant & Nursery School	178	1	4	0	0
97800	St. Joseph's Catholic Primary School	205	4	5	0	0
96200	St. Nicolas Church of England Junior School	253	2	6	0	0
96100	St. Pauls Catholic Primary School	330	1	7	0	0
96300	Stockcross Church of England Primary School	107	0	3	0	0
96400	Streatley Church of England VC Primary School	95	1	2	0	0
96500	Sulhamstead and Ufton Nerve C of E VA Primary School	104	2	3	0	0
99700	Thatcham Park Church of England Primary School	382	5	8	0	0
96600	Theale Church of England Primary School	232	0	5	0	0
96700	Welford and Wickham Church of England Primary School	87	0	2	0	0
96800	Westwood Farm Infant School	169	1	4	0	0
96900	Westwood Farm Junior School	219	1	5	0	0
97000	Whitelands Park Primary School	314	3	7	0	0
98700	The Willows Primary School	251	6	6	0	0
99400	The Winchcombe School	275	4	6	0	0
97300	Woolhampton Church of England Primary School	98	0	2	0	0
97400	Yattendon Church of England Primary School	82	1	2	0	0
98900	Denefield School	848	7	34	0	0
98800	The Downs School	901	9	37	0	0
99000	John O'Gaunt Community Technology College	376	15	16	0	0
99100	Kennet School	1,393	30	56	0	0
99200	Little Heath School	1,296	19	52	0	0
99300	Park House School	773	17	31	0	0
99800	St. Bartholomew's School	1,239	10	50	0	0
99500	Theale Green Community School	899	18	36	0	0
99900	Trinity School & Performing Arts College	700	10	28	0	0
99600	The Willink School	821	18	33	0	0
	PRIMARY TOTAL	12,600	155	320	7	42,000
	SECONDARY TOTAL	9,246	153	373	0	0
	TOTAL ALL SCHOOLS	21,846	308	693	7	42,000

Additional SEN Funding for Schools with Disproportionate large numbers of High Needs Pupils - Funding Options

		Relevant Data			Option A Current Method			Option B			Option C			Option D		
Cost Centre	SCHOOL	Total Pupil No.s (Oct 2013 Census excl RU)	Pupil No.s Receiving Top Ups July 2014	Notional SEN Budget 2014/15	Assumed No. of Pupils Formula Funded	Add'l High Needs Pupils (rounded up)	Add'l Funding	Assumed No. of Pupils Formula Funded	Add'l High Needs Pupils (un rounded)	Add'l Funding	Assumed No. of Pupils Formula Funded	Add'l High Needs Pupils (un rounded)	Add'l Funding	Actual No. of HN Pupils	Funding Required	Shortfall in notional SEN Budget
	Primary				2.00%	above 1:50	£6,000	2.00%	above 1:50	£6,000	1.91%	1% above LA avg	£6,000			
	Secondary				4.00%	above 1:100		4.00%	above 1:100		2.57%	1% above LA avg				
91000	Aldermaston Church of England Primary School	177	3	28,847	4	0	0	3.54	0.00	0	3.39	0.00	0	3	18,000	0
91100	Basildon Church of England Primary School	138	1	19,705	3	0	0	2.76	0.00	0	2.64	0.00	0	1	6,000	0
91300	Beedon Church of England Controlled Primary School	41	0	10,957	1	0	0	0.82	0.00	0	0.78	0.00	0	0	0	0
91400	Beenham Primary School	94	1	15,276	2	0	0	1.88	0.00	0	1.80	0.00	0	1	6,000	0
91200	Birch Copse Primary School	417	3	64,321	9	0	0	8.34	0.00	0	7.98	0.00	0	3	18,000	0
91500	Bradfield Church of England Primary School	157	1	26,678	4	0	0	3.14	0.00	0	3.00	0.00	0	1	6,000	0
91600	Brightwalton Church of England Aided Primary School	103	1	12,187	3	0	0	2.06	0.00	0	1.97	0.00	0	1	6,000	0
91700	Brimpton Church of England Primary School	41	3	6,499	1	2	12,000	0.82	2.18	13,080	0.78	2.22	13,295	3	18,000	11,501
91800	Bucklebury Church of England Primary School	126	1	18,307	3	0	0	2.52	0.00	0	2.41	0.00	0	1	6,000	0
91900	Burghfield St. Mary's Church of England Primary School	194	4	26,231	4	0	0	3.88	0.12	720	3.71	0.29	1,736	4	24,000	0
92000	Calcot Infant School & Nursery	231	0	71,313	5	0	0	4.62	0.00	0	4.42	0.00	0	0	0	0
92100	Calcot Junior School	228	2	54,864	5	0	0	4.56	0.00	0	4.36	0.00	0	2	12,000	0
95600	Chaddleworth St. Andrew's C of E Primary School	23	0	7,089	1	0	0	0.46	0.00	0	0.44	0.00	0	0	0	0
92400	Chieveley Primary School	186	2	23,168	4	0	0	3.72	0.00	0	3.56	0.00	0	2	12,000	0
95900	Cold Ash St. Mark's Church of England Primary School	183	2	20,238	4	0	0	3.66	0.00	0	3.50	0.00	0	2	12,000	0
92200	Compton Church of England Primary School	145	1	23,848	3	0	0	2.90	0.00	0	2.77	0.00	0	1	6,000	0
92300	Curridge Primary School	101	0	9,407	3	0	0	2.02	0.00	0	1.93	0.00	0	0	0	0
92500	Downsway Primary School	211	5	32,314	5	0	0	4.22	0.78	4,680	4.04	0.96	5,785	5	30,000	0
92800	Enborne Church of England Primary School	58	0	9,702	2	0	0	1.16	0.00	0	1.11	0.00	0	0	0	0
92900	Englefield Church of England Primary School	109	1	13,521	3	0	0	2.18	0.00	0	2.08	0.00	0	1	6,000	0
93000	Falkland Primary School	448	7	50,737	9	0	0	8.96	0.00	0	8.57	0.00	0	7	42,000	0
93100	Fir Tree Primary School & Nursery	169	1	59,469	4	0	0	3.38	0.00	0	3.23	0.00	0	1	6,000	0
93200	Francis Baily Primary School	528	5	88,639	11	0	0	10.56	0.00	0	10.10	0.00	0	5	30,000	0
93400	Garland Junior School	191	2	45,596	4	0	0	3.82	0.00	0	3.65	0.00	0	2	12,000	0
93500	Hampstead Norreys Church of England Primary School	101	3	12,327	3	0	0	2.02	0.98	5,880	1.93	1.07	6,409	3	18,000	5,673
93600	Hermitage Primary School	202	1	33,309	5	0	0	4.04	0.00	0	3.86	0.00	0	1	6,000	0
93700	Hungerford Primary School	409	2	83,243	9	0	0	8.18	0.00	0	7.82	0.00	0	2	12,000	0
92700	The Ilsleys' Primary School	58	0	8,061	2	0	0	1.16	0.00	0	1.11	0.00	0	0	0	0
93800	Inkpen Primary School	79	0	14,837	2	0	0	1.58	0.00	0	1.51	0.00	0	0	0	0
93900	John Rankin Infant & Nursery School	232	2	37,067	5	0	0	4.64	0.00	0	4.44	0.00	0	2	12,000	0
94000	John Rankin Junior School	236	3	41,998	5	0	0	4.72	0.00	0	4.51	0.00	0	3	18,000	0
94100	Kennet Valley Primary School	195	1	44,167	4	0	0	3.90	0.00	0	3.73	0.00	0	1	6,000	0
94200	Kintbury St. Mary's Church of England Primary School	154	5	25,661	4	1	6,000	3.08	1.92	11,520	2.95	2.05	12,327	5	30,000	4,339
94300	Lambour Church of England Primary School	189	1	44,609	4	0	0	3.78	0.00	0	3.62	0.00	0	1	6,000	0
94400	Long Lane Primary School	263	2	37,219	6	0	0	5.26	0.00	0	5.03	0.00	0	2	12,000	0
95800	Mortimer St. Johns Church of England Infant School	169	0	30,585	4	0	0	3.38	0.00	0	3.23	0.00	0	0	0	0
97500	Mortimer St. Mary's Church of England Junior School	230	4	29,356	5	0	0	4.60	0.00	0	4.40	0.00	0	4	24,000	0
94500	Mrs. Bland's Infant & Nursery School	172	0	37,417	4	0	0	3.44	0.00	0	3.29	0.00	0	0	0	0
94600	Pangbourne Primary School	188	2	29,053	4	0	0	3.76	0.00	0	3.60	0.00	0	2	12,000	0
94700	Parsons Down Infant School	251	0	51,489	6	0	0	5.02	0.00	0	4.80	0.00	0	0	0	0
94800	Parsons Down Junior School	290	4	57,727	6	0	0	5.80	0.00	0	5.55	0.00	0	4	24,000	0
94900	Purley Church of England Infants School	69	2	11,035	2	0	0	1.38	0.62	3,720	1.32	0.68	4,081	2	12,000	965
95000	Robert Sandilands Primary School & Nursery	213	4	46,267	5	0	0	4.26	0.00	0	4.07	0.00	0	4	24,000	0
95100	Shaw-cum-Donnington Church of England Primary School	84	1	19,116	2	0	0	1.68	0.00	0	1.61	0.00	0	1	6,000	0
95200	Shefford Church of England Primary School	23	0	5,486	1	0	0	0.46	0.00	0	0.44	0.00	0	0	0	0
95300	Speenhamland Primary School	261	3	55,032	6	0	0	5.22	0.00	0	4.99	0.00	0	3	18,000	0
95400	Springfield Primary School	289	3	43,336	6	0	0	5.78	0.00	0	5.53	0.00	0	3	18,000	0
95500	Spurcroft Primary School	373	0	70,856	8	0	0	7.46	0.00	0	7.13	0.00	0	0	0	0
95700	St. Finian's Catholic Primary School	190	2	30,627	4	0	0	3.80	0.00	0	3.63	0.00	0	2	12,000	0
97700	St. John the Evangelist Infant & Nursery School	178	1	29,790	4	0	0	3.56	0.00	0	3.40	0.00	0	1	6,000	0
97800	St. Joseph's Catholic Primary School	205	3	35,425	5	0	0	4.10	0.00	0	3.92	0.00	0	3	18,000	0
96200	St. Nicolas Church of England Junior School	253	2	48,891	6	0	0	5.06	0.00	0	4.84	0.00	0	2	12,000	0
96100	St. Pauls Catholic Primary School	330	0	51,447	7	0	0	6.60	0.00	0	6.31	0.00	0	0	0	0
96300	Stockcross Church of England Primary School	107	0	10,799	3	0	0	2.14	0.00	0	2.05	0.00	0	0	0	0
96400	Streatley Church of England VC Primary School	95	1	12,763	2	0	0	1.90	0.00	0	1.82	0.00	0	1	6,000	0
96500	Sulhamstead and Ufton Nerve C of E VA Primary School	104	2	14,233	3	0	0	2.08	0.00	0	1.99	0.01	65	2	12,000	0
99700	Thatcham Park Church of England Primary School	382	2	83,663	8	0	0	7.64	0.00	0	7.31	0.00	0	2	12,000	0
96600	Theale Church of England Primary School	232	2	40,297	5	0	0	4.64	0.00	0	4.44	0.00	0	2	12,000	0
96700	Welford and Wickham Church of England Primary School	87	0	11,263	2	0	0	1.74	0.00	0	1.66	0.00	0	0	0	0
96800	Westwood Farm Infant School	169	0	25,864	4	0	0	3.38	0.00	0	3.23	0.00	0	0	0	0
96900	Westwood Farm Junior School	219	2	31,691	5	0	0	4.38	0.00	0	4.19	0.00	0	2	12,000	0
97000	Whitelands Park Primary School	314	1	81,845	7	0	0	6.28	0.00	0	6.01	0.00	0	1	6,000	0
98700	The Willows Primary School	251	3	85,338	6	0	0	5.02	0.00	0	4.80	0.00	0	3	18,000	0
99400	The Wincombe School	275	4	78,067	6	0	0	5.50	0.00	0	5.26	0.00	0	4	24,000	0
97300	Woolhampton Church of England Primary School	98	0	16,863	2	0	0	1.96	0.00	0	1.87	0.00	0	0	0	0
97400	Yattendon Church of England Primary School	82	1	12,172	2	0	0	1.64	0.00	0	1.57	0.00	0	1	6,000	0
98900	Denefield School	848	6	261,354	34	0	0	33.92	0.00	0	21.78	0.00	0	6	36,000	0
98800	The Downs School	901	9	157,180	37	0	0	36.04	0.00	0	23.14	0.00	0	9	54,000	0
99000	John O'Gaunt Community Technology College	376	10	124,921	16	0	0	15.04	0.00	0	9.66	0.34	2,060	10	60,000	0
99100	Kennet School	1,393	28	410,885	56	0	0	55.72	0.00	0	35.78	0.00	0	28	168,000	0
99200	Little Heath School	1,296	19	242,403	52	0	0	51.84	0.00	0	33.28	0.00	0	19	114,000	0
99300	Park House School	773	17	231,323	31	0	0	30.92	0.00	0	19.85	0.00	0	17	102,000	0
99800	St. Bartholomew's School	1,239	10	208,491	50	0	0	49.56								

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West Berkshire Schools' Forum	
Title of Report:	High Needs Place Funding 2015/16
Date of Meeting:	29th September 2014
Contact Officer(s)	Jane Seymour
For Discussion	

1. Background

- 1.1 Place funding is allocated by the Education Funding Agency for children and young people with high level needs who are under 16 and attend a special or resourced school.
- 1.2 Place funding is also allocated by the Education Funding Agency for young people with high level needs who are over 16 and attend a mainstream school, special school, resourced school or FE College.
- 1.3 Current place funding in 2014/15 is based on returns previously made by the Local Authority requesting a specified number of funded places in each setting. Figures in these returns are estimates as typically returns have to be made in January / February for the following academic year. At that stage it is not possible to predict where all students will be placed (particularly post 16 students) or which new students may come in to the system. The number of funded places notionally allocated to each institution will therefore always be an approximation. Post 16 places were determined by the LA where the student resided rather than the LA where the provision was located
- 1.4 When returns were made for the 2014/15 financial year, the DfE allowed very little growth in total numbers, so 2014/15 place funding does not necessarily represent the number of places requested.

2. High Needs Place Funding 2014/15 Academic Year

- 2.1 Places currently funded by the EFA and actual places currently filled are as follows:

SCHOOL / INSTITUTION	Pre 16	Post 16	TOTAL	ACTUAL
Primary schools with special resources				
Speenhamland (PD Resource)	10	0	10	9
The Winchcombe (Speech Lang Resource)	15	0	15	14
Theale Primary (ASD Resource)	10	0	10	10

Westwood Farm Infant (HI Resource)	5	0	5	2
Westwood Farm Junior (HI Resource)	10	0	10	6
Secondary (special resources / post 16 only)				
Denefield	0	2	2	0
John O'Gaunt	0	0	0	0
Kennet (inc. PD & HI Resource)	29	9	38	35
Little Heath	0	5	5	2
Park House	0	2	2	2
St. Bartholomew's	0	2	2	3
The Downs	0	1	1	2
The Willink	0	2	2	2
Theale Green (inc. ASD Resource)	10	7	17	16
Trinity (inc. SpLD Resource)	30	0	30	31
Special schools				
Brookfields	173	45	218	218
The Castle	113	34	147	149
FE Colleges				
Newbury College	0	68	68	55
PRU Service				
Alternative Curriculum	48	0	48	48
Reintegration Service	36	0	36	36
TOTAL	489	177	666	640

3. High Needs Place Funding 2015/16

3.1 The EFA has notified Local Authorities that it will base 2015/16 financial year place funding on 2014/15 academic year places and that any extra numbers must be applied for as "exceptions". The "Schools Revenue Funding 2015 to 2016 Operational Guide" makes it clear that the EFA expects there to be few exceptions.

3.2 Post 16 places will now be determined by the LA where the provision is located and the relevant funding adjustments will be made to the DSG.

3.3 The Guidance states that exceptions are "unlikely" to be agreed in the following circumstances:

- If the total additional places requested by the Authority represent less than 5% of the Authority's total 14/15 place allocation
- If the additional places requested for an institution (which has more than 50 places) represent an increase of less than 10%
- If the additional places requested for an institution (which has fewer than 50 places) are fewer than 5 additional places.

3.4 The deadline for submission of exception requests to the EFA is 17th October. The EFA aims to announce decisions on exception requests by

December 2014, depending on the volume of exception requests received.

- 3.5 The SEN Assessment Team is currently in the process of reviewing place funding requirements for 2015/16. This process will involve consideration of actual numbers of high needs pupils in placements, intelligence about possible changes of placement in 2015/16 and views from the schools / institutions themselves about their likely numbers. Providers will therefore have the opportunity to have an input to this process.
- 3.6 It is not anticipated at this stage that there will be any very significant increase in need for place funding generally. However, additional places will be needed for the new secondary ASD Resource due to open in September and also for West Berkshire Training Consortium which takes West Berkshire high needs students but for whom no place funding has ever been allocated.
- 3.7 It will be possible to give an update after 17th October when any exception requests have been made.

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Agenda Item 11

Dedicated School's Grant (DSG) 2014-15 Budget Monitoring Month 5

Budget manager	Cost Centre	Description	Original Budget	Net Virements in year	Amended Budget	Forecast	Variance	Comments
Ian Pearson	90020	Primary Schools	46,433,670		46,433,670	46,433,670	0	
Ian Pearson	90025	Secondary Schools	16,621,740		16,621,740	16,621,740	0	
Maxine Slade	90035	LAC Pupil Premium	0		0	0	0	
Ian Pearson	90112	Special Costs Primary	24,960		24,960	24,960	0	
Ian Pearson	90117	Special Costs Secondary	11,880		11,880	11,880	0	
Ian Pearson	90230	Schools in Financial Difficulty	115,470	115,680	231,150	231,150	0	
Ian Pearson	90235	School Delegated Contingency	370,000		370,000	370,000	0	
Maxine Slade	90255	Virtual School Service	168,130		168,130	168,130	0	
Cathy Burnham	90349	Behaviour Support - DSG	142,060		142,060	142,060	0	
Melanie Ellis	90711	Schools Finance	0		0	0	0	
Caroline Corcoran	90583	CLA/MPA Licences	76,120		76,120	76,120	0	
Ian Pearson	90019	DSG Servicing of Schools' Forum	42,220		42,220	37,220	-5,000	Supplies and Services underspend
Caroline Corcoran	90743	Admissions	180,450		180,450	180,450	0	
Schools Block Total			64,186,700	115,680	64,302,380	64,297,380	-5,000	
Ian Pearson	90010	Nursery Schools	809,470		809,470	809,470	0	
Maria Shepherd	90017	Early Years Support Team	72,300		72,300	56,719	-15,581	Early Years & Childcare Data Officer on Maternity Leave
Maria Shepherd	90018	Expenditure on 2 year olds	1,267,230		1,267,230	1,267,230	0	
Maria Shepherd	90036	Early Years Funding for PVI	4,308,760		4,308,760	4,308,760	0	
Ian Pearson	90037	Early Yrs Funding Maintained Sector	1,112,950		1,112,950	1,112,950	0	
Maria Shepherd	90051	Early Years Funding - Contingency	354,540	-96,330	258,210	258,210	0	
Early Years Block Total			7,925,250	-96,330	7,828,920	7,813,339	-15,581	
Ian Pearson	90026	Academy Schools RU Top Ups	252,610		252,610	354,814	102,204	Based on Summer Term plus estimates . September changes not yet factored in
Nicola Ponton	90539	Special Schools - Top Up Funding	2,465,120		2,465,120	2,508,829	43,709	Based on Summer Term plus estimates . September changes not yet factored in
Nicola Ponton	90548	Non WBC Special Schools - Top Up Funding	663,900		663,900	719,900	56,000	Based on known children to date.
Nicola Ponton	90575	Non LEA Special School (OofA)	889,740		889,740	857,740	-32,000	Based on known children to date.
Nicola Ponton	90579	Independent Special School Place & Top Up	1,476,030		1,476,030	1,546,030	70,000	Based on known children to date.
Nicola Ponton	90580	Further Education Colleges Top Up	1,345,340		1,345,340	1,345,340	0	
Nicola Ponton	90617	Resourced Units top up Funding maintained	335,060		335,060	297,089	-37,971	Based on Summer Term plus estimates . September changes not yet factored in
Nicola Ponton	90618	Non WBC Resourced Units - Top Up Funding	15,300		15,300	15,300	0	
Nicola Ponton	90621	Mainstream - Top Up Funding maintained	572,830		572,830	480,547	-92,283	Based on Summer Term plus estimates . September changes not yet factored in
Nicola Ponton	90622	Mainstream - Top Up Funding Acadamies	161,940		161,940	176,921	14,981	Based on Summer Term plus estimates . September changes not yet factored in
Nicola Ponton	90624	Non WBC Mainstream - Top Up Funding	50,700		50,700	54,700	4,000	
Cathy Burnham	90625	Pupil Referral Units - Top Up Funding	1,205,500		1,205,500	1,205,500	0	
Jane Seymour	90237	Special Needs Delegated Contingency	1,500,780	-721,860	778,920	0	-778,920	Offsets overspends
High Needs Block: Top Up Funding Total			10,934,850	-721,860	10,212,990	9,562,710	-650,280	
Cathy Burnham	90320	Pupil Referral Units	672,000		672,000	672,000	0	
Ian Pearson	90540	Special Schools	2,860,000	25,000	2,885,000	2,885,000	0	
Rhian Ireland	90555	LAL Funding	134,600		134,600	134,600	0	
Nicola Ponton	90584	Resourced Units - Place Funding (70)	500,000	12,500	512,500	512,500	0	
Cathy Burnham	90582	PRU Outreach	197,000		197,000	197,000	0	
Jane Seymour	90585	HN Outreach Special Schools	105,650		105,650	105,650	0	
High Needs Block: Place Funding Total			4,469,250	37,500	4,506,750	4,506,750	0	
Ian Pearson	90038	Pupil Premium -	0		0	0	0	
Rhian Ireland	90238	Sen Pre School Childrn	50,210		50,210	50,210	0	
Nicola Ponton	90240	Applied Behaviour Analysis	138,630		138,630	126,630	-12,000	
Rhian Ireland	90280	Speci Needs Spprt Team	318,300		318,300	321,300	3,000	Pressure on car allowances
Jane Seymour	90290	Sensory Impairment	227,440		227,440	227,440	0	
Cathy Burnham	90315	Home Tuition	282,000		282,000	282,000	0	
Nicola Ponton	90565	Equipment For SEN Pupils	38,470		38,470	38,470	0	
Jane Seymour	90577	SEN Commissioned Provision	459,110		459,110	509,110	50,000	Increased contract costs from Set 2014- Engaging Potential
Nicola Ponton	90610	Hospital Tuition	0		0	0	0	
Rhian Ireland	90830	ASD Teachers	119,950		119,950	119,950	0	
Rhian Ireland	90957	Early Intervention	33,510		33,510	33,510	0	
Cathy Burnham	90961	Vulnerable Children	80,000		80,000	80,000	0	
Rhian Ireland	90965	SEN Inclusion Programme	28,780		28,780	25,780	-3,000	Planned underspend in supplies and services to fund pressure in 90280
High Needs Block: Non Top Up or Place Funding			1,776,400	0	1,776,400	1,814,400	38,000	
High Needs Block Total			17,180,500	-684,360	16,496,140	15,883,860	-612,280	
Total Expenditure across funding bocks			89,292,450	-665,010	88,627,440	87,994,579	-632,861	
SUPPORT SERVICE RECHARGES			720,890		720,890	720,890	0	
TOTAL DSG EXPENDITURE			90,013,340	-665,010	89,348,330	88,715,469	-632,861	
Ian Pearson	90030	DSG Grant Account	-90,013,340	665,010	-89,348,330	-88,715,469	632,861	
NET DSG EXPENDITURE			0	0	0	0	0	

632,861

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Agenda Item 12

SCHOOLS' FORUM & HEADS FUNDING GROUP

FORWARD PLAN 1st September 2014 – 31st December 2014

(reports to be submitted to cloosen@westberks.gov.uk and be in the standard report format for these groups)

REPORT TITLE	PURPOSE	LEAD OFFICER	COMMENTS
18th SEPTEMBER 2014 (Thursday) - HEADS FUNDING GROUP			
REPORT DEADLINE is Thursday 11th September at 12 noon			
School Formula Proposals 2015/16	Review the formula following the consultation with schools and the guidance received from the DfE and agree a recommendation to take to Schools' Forum	Claire White	
Trade Union Facilities Budget	Review the proposal received from Unions on budget requirement and funding arrangement for 2014/15 and 2015/16		
Dedelegations 2015/16	Review the dedelegations following the consultation with schools and each school phase to agree a recommendation to take to Schools' Forum	Shannon Coleman-Slaughter	
Additional Funding Criteria 2015/16	Review the criteria for growth fund, falling rolls fund, additional SEN, and primary schools in financial difficulty and agree a recommendation to take to Schools' Forum	Claire White	
High Needs Place Number Review	Review the current high needs place numbers being funded and requirements for 2015/16	Jane Seymour	
Review of the Language and Literacy Centres	Request from HFG to review the effectiveness and value of the Language and Literacy Centres	Jane Seymour	Deferred to Spring 2015
29TH SEPTEMBER 2014 (Monday) - SCHOOLS FORUM			
REPORT DEADLINE is Friday 19th September			
School Formula Proposals 2015/16	Review and agree on the recommendation to go to Council's Executive	Claire White	
Dedelegation Proposals 2015/16	Each school phase in the maintained sector to take a vote on each service to be centrally retained or not (to include proposal to increase the budget for Trade Union Facilities).	Shannon Coleman-Slaughter	
Additional Funding Criteria 2015/16	To agree the criteria and sums to set aside for the growth fund, falling rolls fund, additional SEN, and primary schools in financial difficulty	Claire white	
High Needs Place Number Review	Review the current high needs place numbers being funded and bid for exceptional increase in places	Jane Seymour	
School Funding benchmarking information 2014/15	Review the latest benchmarking information	Carolynn Loosen	Deferred due to information not yet released by DfE
DSG Monitoring 2014/15 month 5	Review the latest budget monitoring information	Shannon Coleman-Slaughter	

25th NOVEMBER 2014 (Tuesday) - HEADS FUNDING GROUP			
REPORT DEADLINE is Tuesday 18th November at 12 noon			
School (DSG) Budget - Draft Proposals for 2015/16	Review the likely DSG funding for 2015/16 and overview of the draft DSG budget	Claire White & Shannon Coleman-Slaughter	
High Needs Budget Proposals 2015/16	Detailed review of likely budget requirement for 2015/16	Jane Seymour	
Early Years Budget Proposals 2015/16	Detailed review of likely budget requirement for 2015/16	Maria Shepherd	
PRU – Review of current funding arrangements and proposals for 2015/16	Group to consider proposals on the funding arrangements for 2015/16	Cathy Burnham	
Update on Schools in Financial Difficulty	Review of schools with a deficit budget	Claire White	
Therapy Services	Detailed report on the funding of this service and agree a recommendation to take to Schools' Forum	Jane Seymour	
8th DECEMBER 2014 (Monday) - SCHOOLS FORUM			
REPORT DEADLINE is Friday 28th November			
School (DSG) Budget - Draft Proposals for 2015/16	Review the likely DSG funding for 2015/16 and overview of the draft DSG budget	Claire White & Shannon Coleman-Slaughter	
High Needs Budget Proposals 2015/16	Overview of likely budget requirement for 2015/16	Jane Seymour	
Early Years Budget Proposals 2015/16	Overview of likely budget requirement for 2015/16	Maria Shepherd	
PRU – Review of current funding arrangements and proposals for 2015/16	Agree proposals on the funding arrangements for 2015/16	Cathy Burnham	
Update on Schools in Financial Difficulty	Review of schools with a deficit budget	Claire White	
Therapy Services	Agree future funding of this service	Jane Seymour	
DSG Monitoring 2014/15 month 7	Review the latest budget monitoring information	Shannon Coleman-Slaughter	