

# Notice of Meeting

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## Schools Forum

**Monday 4th December, 2023 at 5.00pm**  
Via Zoom

This meeting will be streamed live here: [www.westberks.gov.uk/schoolsforumlive](http://www.westberks.gov.uk/schoolsforumlive)

Date of despatch of Agenda: Tuesday, 28 November 2023

For further information about this Agenda, or to inspect any background documents referred to in Part I reports, please contact Jessica Bailiss on (01635) 503124  
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Further information and Minutes are also available on the Council's website at [www.westberks.gov.uk](http://www.westberks.gov.uk)



## Agenda - Schools Forum to be held on Monday, 4 December 2023 (continued)

**Forum Members:** Reverend Mark Bennet, Melissa Cliffe, Heather Codling, Iain Cottingham, Paul Davey, Jacque Davies, Gemma Duff, Richard Hand, Michelle Harrison, Keith Harvey (Vice-Chair), Richard Hawthorne, Jon Hewitt, Trevor Keable, Jo Lagares, Maria Morgan, Gemma Piper, Chris Prosser, David Ramsden, Lesley Roberts, Ant Sizer, Campbell Smith, Graham Spellman (Chair), Phil Spray, Charlotte Wilson and Lindsay Wood

# Agenda

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## Agenda - Schools Forum to be held on Monday, 4 December 2023 *(continued)*

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Sarah Clarke  
Service Director: Strategy and Governance

If you require this information in a different format or translation, please contact Stephen Chard on telephone (01635) 519462.



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Note: These Minutes will remain DRAFT until approved at the next meeting of the Committee

## **SCHOOLS FORUM**

### **MINUTES OF THE MEETING HELD ON MONDAY, 16 OCTOBER 2023**

**Forum Members Present:** Reverend Mark Bennet (Church of England Diocese), Melissa Cliffe (Maintained Primary School Headteacher), Councillor Heather Codling (Executive Portfolio Holder: Children, Education and Young People's Services), Councillor Iain Cottingham (Executive Portfolio Holder: Finance and Corporate Services), Paul Davey (Maintained Primary School Governor), Gemma Duff (Maintained Primary School Governor), Richard Hand (Trade Union), Keith Harvey (Maintained Primary School Headteacher), Richard Hawthorne (Academy School Headteacher), Jon Hewitt (Maintained Special School Headteacher), Trevor Keable (Academy School Governor), Maria Morgan (Maintained Nursery School Headteacher), Gemma Piper (Academy School Headteacher), Chris Prosser (Maintained Secondary School Headteacher), David Ramsden (Maintained Secondary School Headteacher), Lesley Roberts (Maintained Primary School Headteacher), Campbell Smith (Academy School Governor), Graham Spellman (Roman Catholic Diocese) and Phil Spray (Maintained Primary School Governor)

**Also Present:** Avril Allenby (Early Years Service Manager), Rose Carberry (Acting Principal Adviser for School Improvement), AnnMarie Dodds (Executive Director - Children and Family Services), Melanie Ellis (Acting Head of Finance and Property), Nicola Ponton (Acting Service Manager for SEMH) and Jessica Bailiss (Democratic Services Officer)

**Apologies for inability to attend the meeting:** Jacquie Davies, Jo Lagares, Michelle Sancho, Jane Seymour, Charlotte Wilson and Lindsay Wood

#### **PART I**

##### **1 Election of Vice-Chair**

The Chair invited the Schools' Forum to nominate and vote on the position of Vice-Chair for the remainder of the year.

**RESOLVED that** Keith Harvey would be Vice-Chair of the Schools' Forum for the remainder of the 2023/24 financial year.

##### **2 Minutes of previous meeting dated 19th June 2023**

The minutes of the meeting held on 19<sup>th</sup> June 2023 were approved as a true and correct record and signed by the Chair.

##### **3 Actions arising from previous meetings**

Action Jun23-Ac1 and Jun23-Ac2 were completed.

##### **4 Declarations of Interest**

There were no declarations of interest received.

##### **5 Membership**

Jess Bailiss reported that there was still one academy governor vacancy on the Schools' Forum. An election was held late September however, no nominations were received. An

election would be run again at a later stage. It was confirmed that no other members were currently approaching the end of their term of office.

### **6 2024/25 Consultations: Schools Funding Formula and Scheme for Financing Schools (Melanie Ellis)**

Melanie Ellis introduced the report (Agenda Item 7) that set out the requirements and changes for setting the primary and secondary school funding formula for 2024/25 and sought approval of West Berkshire Council's funding proposals to go out to consultation with all schools. The report also sought approval of the proposed consultation on the updated Scheme for Financing Schools (SFS).

The Chair drew attention to the recommendation and suggested the Forum consider recommendations 2.1 (1), (2), (3) and (5) (areas set out below) initially and revisit recommendation 2.1 (4) once agenda item eight on the draft de-delegations had been discussed.

Melanie Ellis reported that the report set out the proposed areas of consultation, which would be undertaken with schools for a period of three weeks. The areas of consultation included:

- (1) The Schools Funding Formula;
- (2) A potential block transfer;
- (3) Additional funds;
- (4) De-delegations;
- (5) The SFS.

Melanie Ellis drew attention to the Briefing and Consultation Document for Schools in Appendix A. Melanie Ellis referred to the recent matter in the press that the Department for Education had made an error with schools' funding and this meant that much of the information provided in the report would need to be revised in time for the consultation to go out. Melanie Ellis proposed that the consultation be delayed and extended by one day to provide time for the information to be revised. Schools' funding had been due to rise by 2.7 percent per pupil however according to the news it was expected to only rise by 1.9 percent.

Melanie Ellis referred to section five on sparsity as this was the only area where West Berkshire had diverged from the National Funding Formula (NFF). In the last couple of years, as a result of consultation responses, the Schools' Forum had approved the minimum level.

For 2024/25 the local authority was required to move ten percent closer to the NFF across all factors. The tables under section five showed the 2024/25 NFF values for sparsity compared to the minimum that could be set and it could be seen that these figures were getting closer over time. A question on whether schools supported the NFF sparsity factor being applied in full or at the minimum was included within the consultation.

Melanie Ellis drew attention to section six on block transfer, where local authorities could choose to transfer up to half a percent of the schools block to other blocks of the DSG, with approval from the Schools' Forum. Without Schools' Forum agreement or where a local authority wished to transfer more than half a percent, a disapplication request must be submitted to the Secretary of State by 17<sup>th</sup> November 2023. A question on whether schools supported a transfer of funding was included in the consultation.

Melanie Ellis drew attention to section 6.13, which detailed that the Local Authority was part of the Delivering Better Value (DBV) in SEND Programme. The programme

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recommended reviewing areas of increased costs and to find a practical solution to try and bring costs down by a number of one off schemes. As a result, the Local Authority had asked for a one percent transfer to be modelled which, if approved, would be used to fund the work required as a result of the DBV Programme. A question on this was included in the consultation.

Melanie Ellis reported that section seven on Notional SEN was provided for information and did not require a question in the consultation. This was to help schools understand what the funding should cover.

Melanie Ellis drew attention to section nine and reported that each year the Schools' Forum had to agree the criteria for additional funds. The Local Authority would be informed of the Growth Fund allocation around December time. From 2024/25, falling rolls funding was also included within the schools' block DSG allocations and therefore a question on whether this should be re-introduced in West Berkshire was included.

Section 11 covered the SFS and Melanie Ellis reported that there had been minimal changes to the scheme. Section 11.4 detailed that the Heads Funding Group (HFG) had undertaken two detailed meetings about surplus balances in schools and had requested further information from schools with excess balances. The table under 11.5 showed the schools with a balance in reserves that was more than ten percent of their annual funding. As a result of discussions, the HFG had recommended that the SFS should contain a clawback mechanism for schools with balances over ten percent of the budget share, subject to a minimum balance being retained by the school of £50k. A question on this had been included in the consultation to see if schools would support a claw back mechanism going forward. The funding would be re-distributed to schools or the High Needs Block depending on which block the funding had come from initially.

Melanie Ellis highlighted that all the questions proposed were included in section 12 of the document. Provisional allocations modelled on the different sparsity and transfer options were included in Appendix Ai 1.

Keith Harvey referred to the Government's error on schools' funding and queried if the 1.9 percent included the teacher's pay increase. Melanie Ellis believed that this was included in funding but was unsure if it was included within the percentage quoted. Melanie Ellis would look into this and ensure it was clarified in the consultation.

Gemma Piper referred to the potential funding transfer. In the previous year it had been difficult to commit to this when there had been uncertainty about what it would be used for. Gemma Piper asked if any information would be included in the consultation around where this funding would be prioritised if approved and what impact it would have. Melanie Ellis reported that sections 6.8 to 6.13 provided suggestions from Jane Seymour on how the funding would be used if approved. Gemma Piper noted this however, felt that the information needed to specifying the impact each suggestion would have, for example in terms of savings. The information provided guidance however, not the value required to help school leaders make a decision. Melanie Ellis stated she would seek further information from Jane Seymour to be included with the consultation.

Reverend Mark Bennet referred to section seven on the notional SEND Figures and queried if anyone had reality checked the figures against what was happening in schools. Melanie Ellis confirmed that a formula had been used that had been provided by the DfE. It was felt that schools would need to give a view on whether this was what was being experienced in reality.

Keith Harvey commented on the transfer of funding and did not feel that transferring one percent from the Schools Budget to the High Needs Budget would deliver better value.

Richard Hand referred to the DfE's miscalculation of funding and that it was anticipated that this could be up to £55k to £100k for secondaries and for primaries around £17k.

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Richard Hand queried if there was an idea of which schools would be most adversely affected in West Berkshire. Melanie Ellis expected larger schools to be impacted the most because many smaller schools were protected within the formula and received the minimum level. Melanie Ellis stated it was difficult to know the impact until the figures had been revised and confirmed that this would be done by Friday 20<sup>th</sup> October.

Lesley Roberts noted that maintained schools were being asked for funding through de-delegations for services such as high needs and school improvement, and queried what academies contributed to these services. Trevor Keable confirmed that academies paid separately for each child.

Trevor Keable queried how the consultation voting worked and queried if there was an opportunity for further discussion. Melanie Ellis reported that the consultation results would be brought back to the next round of meetings. The Schools' Forum would then consider the results and make a decision on each of the areas. The Chair clarified that this meeting would take place on 4<sup>th</sup> December 2023.

Chris Prosser referred to the transfer of funding and commented that historically the Schools' Forum had voted in line with the view of schools provided through the consultation. This had not always seemed fair because not all schools contributed to the consultation.

Trevor Keable queried why a clawback was being recommendation for schools with balances over ten percent when the DfE had recommended 20 percent through a parliamentary question in 2020. Melanie Ellis reported that 10 percent was reached through a discussion with the HFG. Gemma Piper was aware that the ESFA advised that schools had a five percent running surplus. Keith Harvey was aware of the parliamentary question referred to and believed it was referring to academies having a carry forward of no more than 20 percent, rather than maintained schools.

### **RESOLVED that:**

- Melanie Ellis would look in to whether the expected 1.9 percent increase in school funding included the teacher's pay increase.
- Melanie Ellis would approach Jane Seymour about providing further information on the impact/value of each of the suggestions on how transferred funding could be used.
- The Schools' Forum approved that the consultation be undertaken with all schools on the areas set out in recommendations 2.1 (1), (2), (3) and (5)

### **7 Draft De-delegations 2024/25 (Lisa Potts)**

Lisa Potts introduced the report (Agenda Item 8), which set out the details, costs and charges to schools of the services on which maintained school representatives were required to vote (on an annual basis). This information would be included in the consultation with schools if approved by the Schools' Forum.

Lisa Potts stated which services the de-delegations consisted of. Previously all de-delegations had been based on pupil numbers from the October census. This information would be available within the next couple of weeks.

At the HFG, it had been queried why there was a difference between how funding was calculated for the Ethnic Minority and Traveller Achievement Service (EMTAS) compared to other services. It was questioned whether this should continue to be funded based on pupil numbers with English as a second language, or based on pupil numbers like the other de-delegated services. This was being looked into.



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Lisa Potts highlighted that the costs for the School Improvement Team had increased and this was because the area had previously been funded by a grant. Some savings from the grant had been used to off-set costs in 2023/24 however, moving forward in to 2024/25 the level of underspend was much lower causing the cost to be pushed up.

Lisa Potts explained that other areas had increased in cost by about three to four percent, which was the normal amount expected to cover the cost of staffing.

The Chair referred the Forum back to the recommendation 2.1 (4) of the previous report (Agenda Item 7), which was to approve the information on the proposed services to be de-delegated to go out to consultation with schools.

**RESOLVED that** the Schools' Forum approved that the information on de-delegations as set out in recommendation 2.1 (4) of agenda item 7, be included in the consultation with schools.

### 8 **DSG Monitoring 2023/24 Month 6 (Michelle Sancho/Lisa Potts)**

Lisa Potts introduced the report (Agenda Item 8), which set out the details, costs and charges to schools of the services on which maintained school representatives were required to vote (on an annual basis). This information would be included in the consultation with schools if approved by the Schools' Forum.

Lisa Potts stated which services the de-delegations consisted of. Previously all de-delegations had been based on pupil numbers from the October census. This information would be available within the next couple of weeks.

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The Chair referred the Forum back to the recommendation 2.1 (4) of the previous report (Agenda Item 7), which was to approve the information on the proposed services to be de-delegated to go out to consultation with schools.

**RESOLVED that** the Schools' Forum approved that the information on de-delegations as set out in recommendation 2.1 (4) of agenda item 7, be included in the consultation with schools.

### 9 **Forward Plans**

The Schools' Forum noted the Forward Plan and Contracts Forward Plan.

### 10 **Date and format of the next meeting**

The next meeting of the Forum would take place virtually on 4<sup>th</sup> December 2023 at 5pm.

Due to there being a number of new members, it was suggested that a meeting should take place in person during 2024. The Chair suggested that this could be looked into for the new year.

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**RESOLVED that** the Schools' Forum give consideration at its meeting in December, to when it would like to meet in person during 2024.

*(The meeting commenced at 5.00 pm and closed at 5.45 pm)*

**CHAIRMAN** .....

**Date of Signature** .....

### Actions from previous meetings

Ref No.	Date of meeting(s) raised	Item	Action	Responsible Officer	Update
Oct23-Ac1	16th October 2023	2024/25 Consultations: Schools Funding Formula and Scheme for Financing Schools	Melanie Ellis would look in to whether the expected 1.9 percent increase in school funding included the teacher's pay increase.	Melanie Ellis	The 1.9% increase is on top of the MSAG inclusion.
Oct23-Ac2	16th October 2023	2024/25 Consultations: Schools Funding Formula and Scheme for Financing Schools	Melanie Ellis would approach Jane Seymour about providing further information on the impact/value of each of the suggestions on how transferred funding could be used.	Melanie Ellis	Update from Jane Seymour: It is not possible to quantify impact as that would depend entirely on how schools use the money. However, anticipated benefits would be: -Reduced requests for Education, Health and Care assessments (the primary objective) -Reduced exclusions -Reduced requests for specialist placements
Oct23-Ac3	16th October 2023	Date and format of the next meeting	Consideration to be given to when the Forum should meet in person in 2024.	All Forum Members	The Schools' Forum to give on view on if an in person-meeting should take place on 22nd January or 11th March 2024.

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## Schools Funding Formula 2024/25: Consultation Results

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<b>Report being considered by:</b>	Schools Forum		
<b>On:</b>	4 <sup>th</sup> December 2023		
<b>Report Author:</b>	Melanie Ellis		
<b>Item for:</b>	Decision	<b>By:</b> All School Members	Members/Forum

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### 1. Purpose of the Report

- 1.1 To set out the results of the consultation with all schools on the proposed primary and secondary school funding formula for 2024/25 and to make a recommendation to Schools Forum.

### 2. Recommendations

- 2.1 Recommend the following for setting the school funding formula for 2024/25, for approval at Schools Forum and to go as a recommendation for political ratification:
- (a) To mirror the Department for Education's (DfE) 2024/25 National Funding Formula (NFF) to calculate the funding allocations.
  - (b) To address any surplus or shortfall in funding by adjusting the AWPU values.
  - (c) To consider whether to use the NFF sparsity factor or the minimum.
  - (d) To consider what % top slice to apply to the schools' funding to support the High Needs Block only.
  - (e) To consider whether to reinstate the Falling Rolls fund.
  - (f) To approve the criteria to be used to allocate additional funds.
  - (g) To approve the proposed services to be de-delegated.
  - (h) To consider whether to include a clawback mechanism in the 23/24 Scheme for Financing Schools (this item to come to a future Schools Forum meeting).
  - (i) To approve the other changes to the 203/24 Scheme. For Financing Schools.

**Is the Schools' Forum required to make a decision as part of this report or subsequent versions due to be considered later in the meeting cycle?**

Yes:

No:

### 3. Implications and Impact Assessment

Equalities Impact:	Positive	No Impact	Negative	Commentary
<b>A</b> Are there any aspects of the proposed decision, including how it is delivered or accessed, that could impact on inequality?		x		
<b>B</b> Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?		x		
<b>Data Impact:</b>		x		
<b>Consultation and Engagement:</b>	The Heads Funding Group  Consultation took place with schools from 20 <sup>th</sup> October and 10 <sup>th</sup> November 2023.			

### 4. Introduction

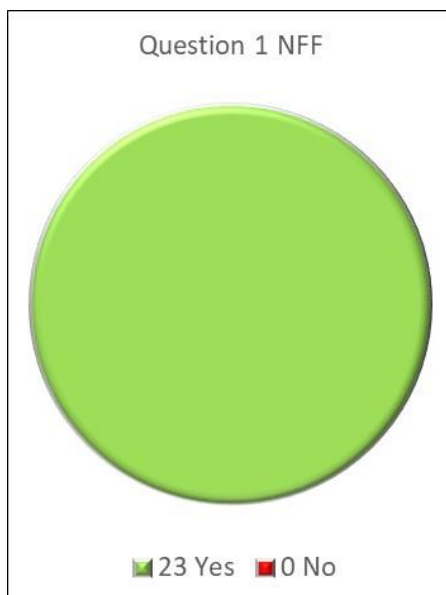
4.1 2024/25 is the second year of transition to the direct schools National Funding Formula (NFF). Each Local Authority (LA) will continue to have some discretion over their schools funding formulae, in consultation with local schools. The LA is responsible for making the final decisions on the formula. Political ratification must be obtained before the 22 January 2024 deadline.

### 5. Consultation Responses

5.1 The consultation was open for three weeks from 20 October 2023 to 10 November 2023 and 24 responses were received.

#### Question 1:

Do you agree that, subject to final affordability, West Berkshire should mirror the DfE’s 2024/25 NFF as closely as possible and that this formula should be used to calculate funding allocations? Yes/No



**Comments:**

**In support:**

“The government is working towards full implementation of the formula and therefore it makes sense for West Berks to mirror this so that there are no shocks in future”.

“As an authority it is important that we continue to mirror the DFE’s 2024/25 NFF. The focus by the government on the full implementation of NFF means that the authority should be doing the same. By doing this we should be well prepared and avoid any unnecessary future shocks”.

“This is consistent with previous years and minimises funding volatility as local formulas transition to the NFF”.

**Unsure:**

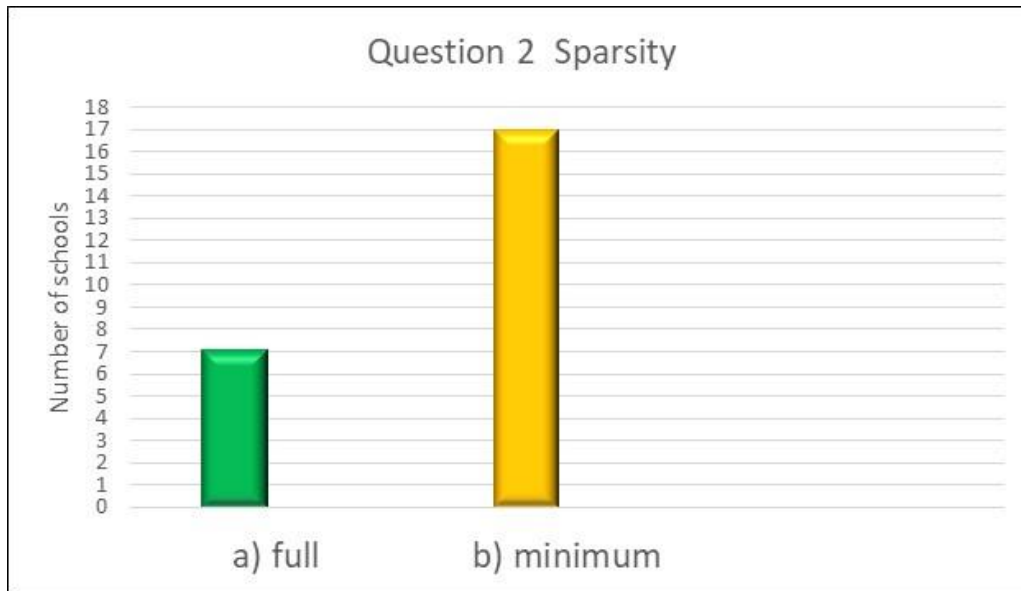
“Unsure we want the maximum amount to schools as direct as possible”.

**HFG recommendation:** Yes to mirror the NFF as closely as possible.

**Question 2:**

How would you support applying the NFF Sparsity Factor?

- A) In Full
- B) Minimum.



**Comments:**

**In support of minimum:**

“Although I agree with West Berks moving as close as possible to the NFF, I still think that the sparsity factor is inherently unfair and would support the minimum application that we can”.

“We think the sparsity factor is unfair and therefore support the minimum possible”.

“Consistent with 23/24”

“As per 22/23, this will still move the WBC formula closer to the NFF”.

**In support of full:**

“As a small school we benefit from the sparsity factor without which we would in deficit. If it is applied as a minimum, all small schools would be at a disadvantage and those that do not qualify, benefit greatly”.

“This helps support the sustainability of small schools and support more isolated communities and families”.

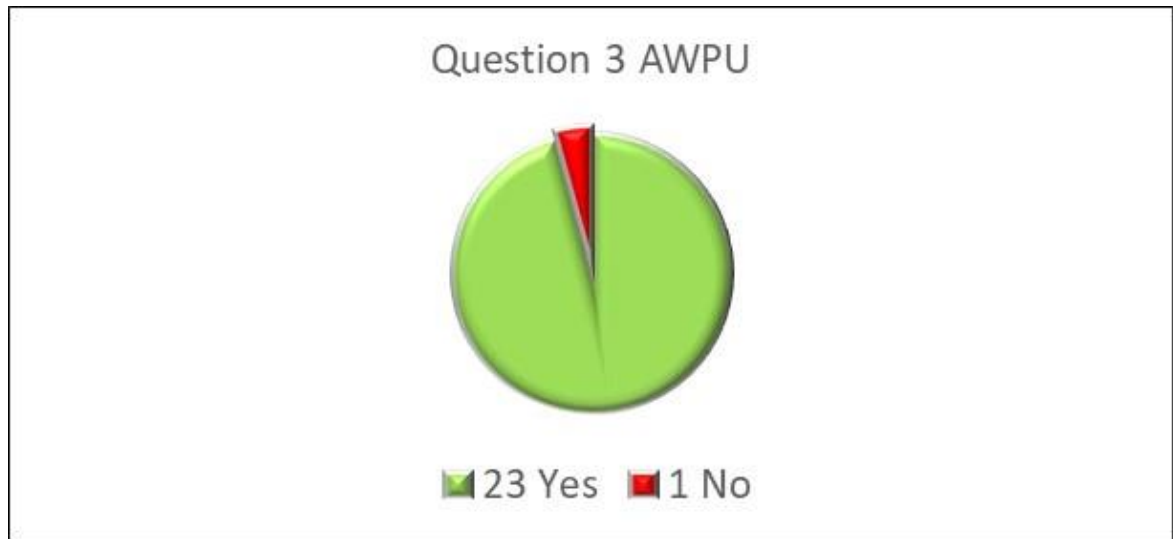
“To support small rural schools who can't use economies of scale to balance budget”.

**HFG recommendation:** to be discussed fully at Schools Forum.



**Question 3:**

Do you agree that any shortfall or surplus in funding is addressed by adjusting the AWPU values? Yes/No



**Comments:**

**In support:**

“Fair approach across all schools with MFG protection”.

“This makes sense”.

“Adjusting AWPU values impacts all schools equally and is therefore the fairest. It is consistent with previous years”.

“Appears to be the fairest way to achieve this”.

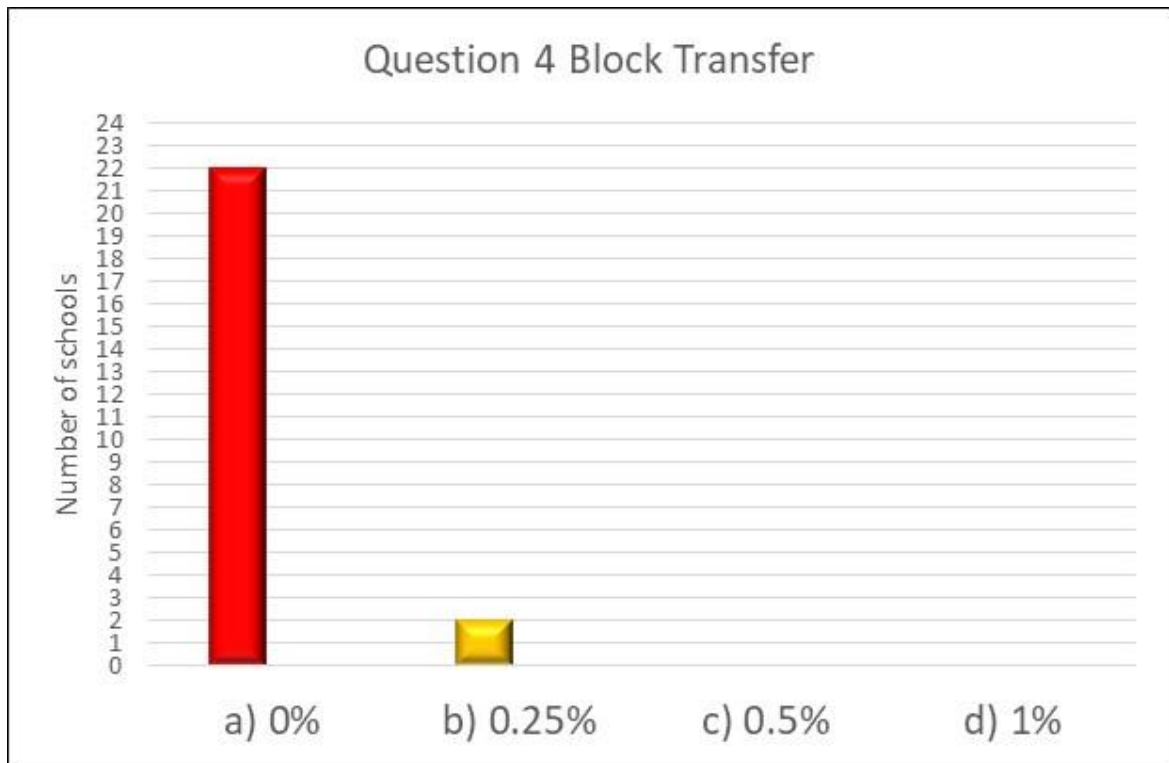
“Because AWPU seems the fairest way to split money per pupil on roll”.

**HFG recommendation:** recommend use of AWPU.

**Question 4:**

What percentage transfer of funding would you support from the Schools Block to the High Needs block?

A) 0%, B) 0.25%, C) 0.5%, D) 1%.



**Comments:**

“I strongly believe that the schools block funds are aimed at the majority of children without EHCPs. This funding is low already and schools are struggling to balance their budgets. If money was transferred to the high needs block, this would further erode schools’ budgets. Schools are already expected to meet many special educational needs from within their existing budgets and it would not be fair or right for additional money to be transferred”.

“All budgets are extremely tight and by transferring money from one to another, leads to all schools missing out. It would also mean an unrealistic return will be completed to the DfE and we should be reporting the shortfall in education”.

“The whole issue of funding for the high needs block is a national issue and needs to be addressed as such by the government. Schools need as much support as possible to fund the increasingly high number of pupils coming into all year groups with SEND therefore budgets should not be decreased – we are all struggling to provide the necessary support from within existing budgets”.

“All schools are struggling to support SEND in schools: to transfer any further funding from Schools Block to High Needs would cause even more problems with school budgets”.

“Anything above 0% will have a significant impact on our overall budget and will require challenging internal savings to be made. I am not against a transfer from

the Schools Block to the High Needs block, but still have concerns about the effectiveness of the SEND strategy and provision, for example, this is used to pay for specialist places, but getting these is not happening, the High Needs budget funds PEX'd students, and there is much uncertainty about different approaches to this between Secondary Schools at the moment. I would hope that the invest to save funding as part of the DBV programme would help address the significant lack of funding that this service has suffered over the last 10 years. As I stated earlier, if I had confidence that the hit I would take to my budget (which I cannot afford) would mean that we (and other schools) could better manage the needs of EHCP (and high needs SEND) students in school, I would be in favour of this, but reluctantly, I would go for 0% for 2024-25".

"More information (methodology, viability of funding allocations) is required to support a higher transfer"

"Given that support is being provided by the DfE under the DBV programme, consideration of any further transfers from the Schools Block to the High Needs Block should only take place once a recovery plan has been created".

"Las should find another pot to take from as schools are struggling to balance their books as it is".

"The schools block funds are aimed at the majority of children without EHCPs. This funding is low already and schools are struggling to balance their budgets. If money was transferred to the high needs block, this would further erode schools' budgets. Schools are already expected to meet many special educational needs from within their existing budgets and it would not be fair or right for additional money to be transferred".

"We are sympathetic with the idea of top slicing Schools Block funding to explore more cost effective ways of supporting SEN students. We agree headteachers and SENDCos should be part of this work, but it needs to be led by the LA. However, we are currently reluctant to commit a significant amount of schools' delegated funding without clearer plans on how the funding would be used, and feel the funding would currently be better spent on things we have control over. If effective plans can be worked up over the course of the next year, we will consider a top slice from the Schools block in 2025/26".

"I disagree with the comment – Agreeing a transfer in 2024/25 **does not** commit schools to transferring funds in future years. A range of percentages for the transfer has been suggested. If funding is used to increase services and create new roles and provision it would be difficult to remove this once established after a year".

**HFG recommendation:** 0% transfer.

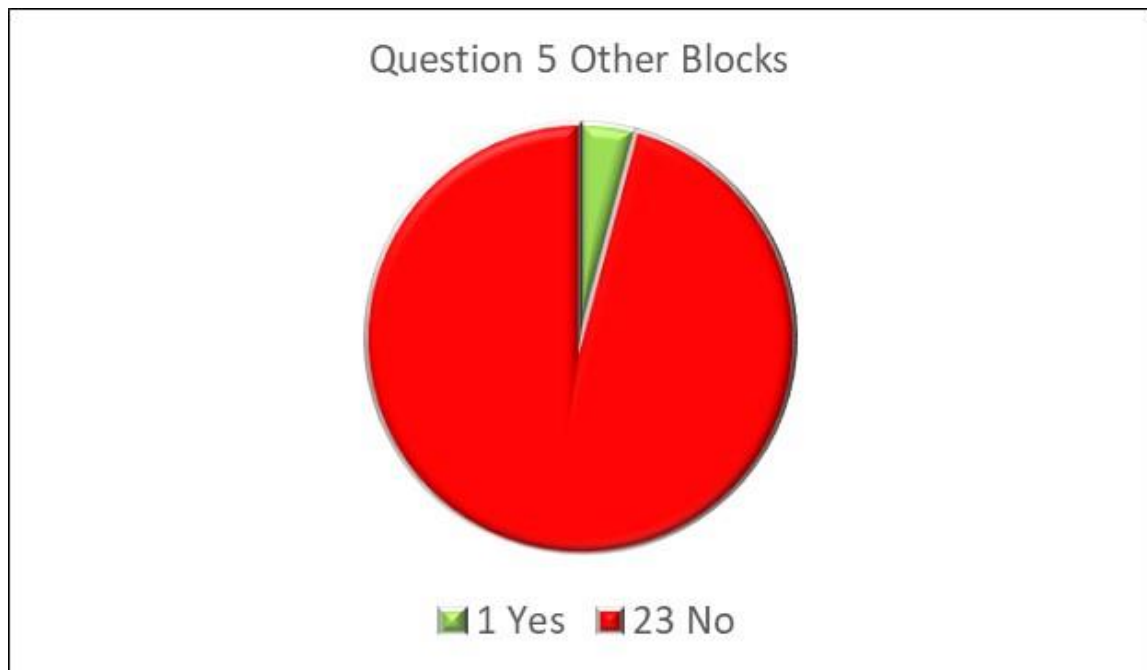
**Local Authority recommendation:** The Local Authority has made a disapplication to the Department for Education (DfE) asking that a 0.5% block transfer from the Schools Block to the High Needs Block be approved if the Schools Forum vote against a transfer. The disapplication has been made in advance of the Forum meeting as the deadline was 17<sup>th</sup> November. Minutes of the Schools Forum discussion will need to be forwarded to the DfE. The DfE has already had the consultation results as part of the disapplication documentation.

A 0.5% transfer will provide an additional £671k funding for the HNB. The impact of this on individual schools was included in the consultation papers. Schools will however be protected from the funding loss by using the growth and falling rolls DfE allocation to top up the schools block funding formula amounting to £650k.

The disapplication has been made to transfer whilst progress is made on reducing the deficit. The draft SEND strategy for 2023-28 seeks to reduce HNB expenditure by improving early identification and provision in the early years, strengthening the mainstream SEND offer, increasing the number of places at the Council's maintained special schools, creating more new local specialist provision for SEMH/Autism and improving access to employment eg. By increasing supported internships. This programme of activity will be supported by the DBV action plan which is likely to include revision of banding systems, improvement to the local offer and improvement of systems for predicting need.

**Question 5:**

Would you support any of this transfer supporting any of the other funding blocks?  
Yes/No



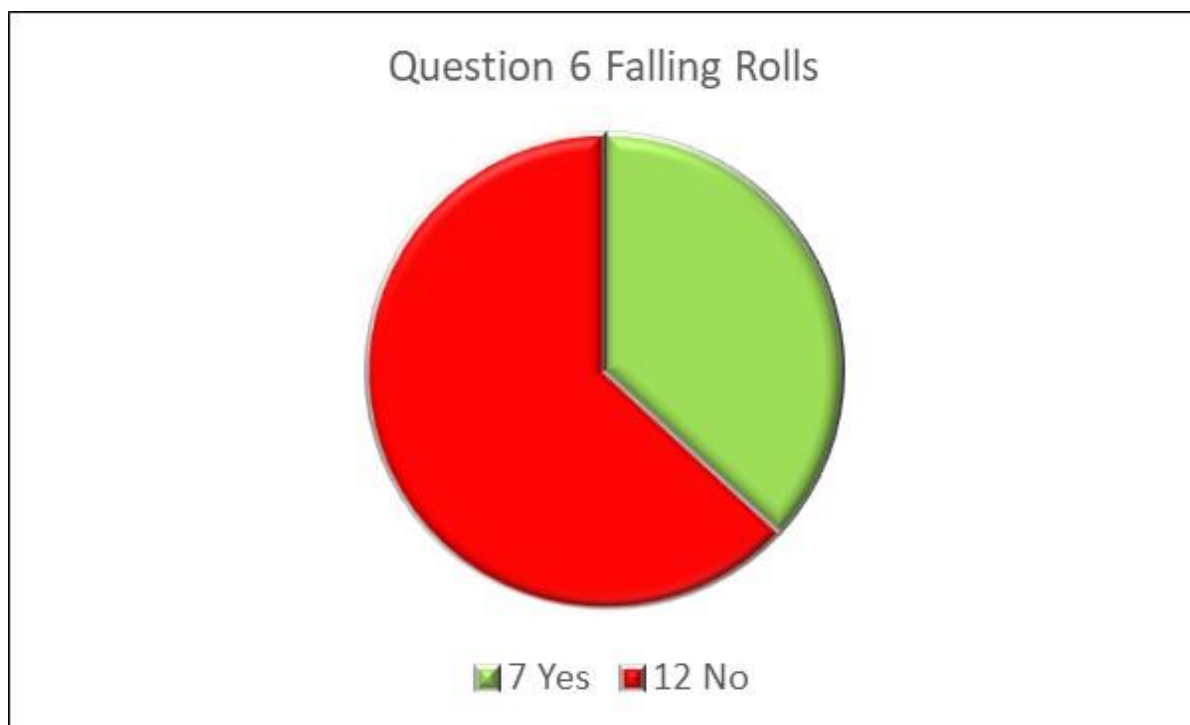
**Comments:**

“There are no convincing proposals in the consultation paper that would suggest a transfer to the Central Block or Early Years block would be worthwhile”.

**HFG recommendation:** no support of other funding blocks.

**Question 6:**

Do you think there should be a falling rolls fund? Yes/No



**Comments:**

**In support:**

“For first year of dramatic fall, particularly for small schools where a loss in numbers has a huge effect on staffing structure”.

“The national picture for falling rolls is one of significance and should be considered. This may not be for some schools now but certainly for the future”.

“Support in principle although more details needed”.

“But only if this is new funding with the DSG allocation, not at the expense of schools’ delegated budgets”.

**Unsure:**

“This is a difficult one. Schools with falling rolls will find it hard to adjust to any budget changes. However, with reducing birth rates, it is likely that an increased number of schools will have falling rolls and this may lead to the fund becoming unsustainable”.

“Difficult one, rolls are falling across the region due to falling birth rates so all schools will be affected and this could make the fund unsustainable”.

“Not sure, Comment: This is a difficult question to answer. Falling rolls especially in the smaller schools perhaps should be addressed differently. If a school has a decreasing number on roll and is no longer economically viable then the decision to

merge or close should be addressed. May be as an authority we have to creatively look at how we can move children to a larger school as per the Shefford model. We could then look at how to use empty buildings more effectively for SEND or SEMH provision. Schools with falling rolls find it hard to adjust to any budget changes. However, with reducing birth rates, as seen perhaps for the first time this year at reception entry levels means that it is likely that an increased number of schools will have falling rolls and this may lead to the fund becoming unsustainable”.

**Against:**

“With reducing birth rates, it is likely that an increased number of schools will have falling rolls and this may lead to the fund becoming unsustainable”.

“Comment: In the past we have adjusted our structure to accommodate this. Eg 4 classes down to 3”.

“Given the current turnover of school staff (both teaching staff and support staff), recruitment is the greater challenge over being overstaffed”.

“If, as the dropping birth rate suggests, this should affect all schools. Although, if not all are affected, schools with falling rolls will find it hard to adjust to any budget changes. In time, it is likely that an increased number of schools will have falling rolls and this may lead to any such fund becoming unsustainable. Could it be reflected in reduced rates perhaps?”.

**HFG recommendation:** to be discussed fully at Schools Forum.

**Question 7:**

Do you agree with the criteria set to access additional funds outside the school formula? Yes/No



**Comments:**

“Yes for growth yes for high needs: Not sure whether additional Growth funding is likely to be used in the future with the changing demographics. The High needs requires you to have >1% EHCP learners than the W Berks average. There are many different ways to manage this and this method seems as reasonable as any. With the increase in numbers across all schools, and therefore even less variation between secondary schools, I would imagine an even smaller % would go to Secondaries. Then again, if more resource goes to Primaries, then there may be better support for these EHCP learners before they come to Secondary school, which is crucial.

The High needs requires you to have >1% EHCP learners than the W Berks average. There are many different ways to manage this and this method seems as reasonable as any. With the increase in numbers across all schools, and therefore even less variation between secondary schools, I would imagine an even smaller % would go to Secondaries. Then again, if more resource goes to Primaries, then there may be better support for these EHCP learners before they come to Secondary school, which is crucial”.

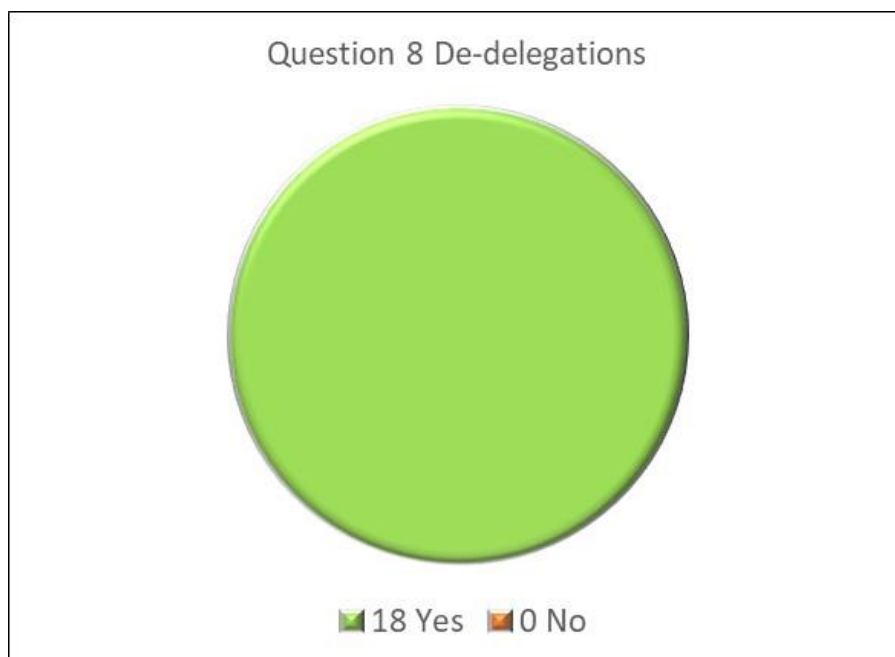
“Where does the money go if not spent?”

“Yes in part. Funding for schools with disproportionately high SEN: At the very least, the methodology needs to take account of all pupils in a school with EHCP plans including those from other Las, not just those from WBC. The number of EHCP students may not be the best indicator of a disproportionately high level of SEN in a school, as it does not take account of the number of students with lower SEN needs, who need additional input and resources”.

**HFG recommendation:** to adopt the criteria as per the consultation

**Question 8**

Do you agree with the proposed De-delegated Services, Education Functions and Health and Safety Service for all maintained schools? Yes/No



**Comments:**

“Partly. I think that the EMTAS funding should be on a per pupil basis rather than on a per EAL pupil basis. This would spread the cost between all schools (as TTST is currently) rather than putting a larger burden on certain schools, which do not get additional funding for EAL, due to their catchment areas”.

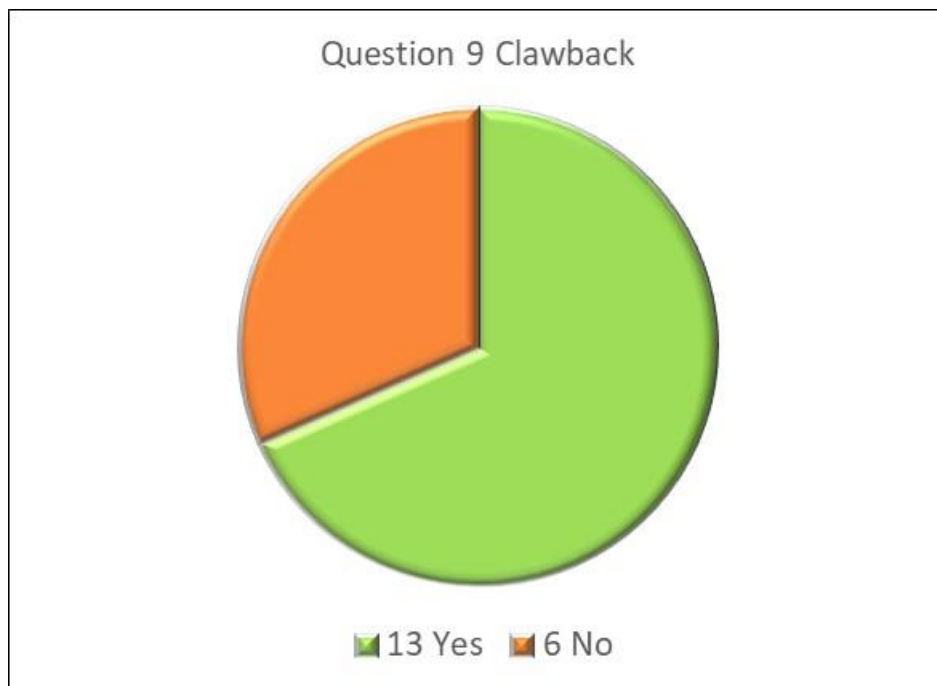
“An essential service for all maintained schools”.

“Yes if statutory roles”.

**HFG recommendations:** to agree the proposed de-delegated services, education functions and health and safety service. To allocate EMTAS funding on a per pupil basis.

**Question 9**

Do you support the Scheme for Financing Schools containing a clawback mechanism for schools with balances over 10% of their budget share, subject to retention of a minimum of £50k? Yes/No.



**Comments:**

**In Support:**

“I did not initially agree with this proposal but feel that we need to find a way to reduce schools' balances to give a more true figure of the state of finance in education. If large balances are held then the government has a strong argument not to increase funding, whereas in reality balances are probably being held to avoid financial difficulty in future”.



“Schools balances need to be reduced to give a true picture of the state of finance in education. Schools retain funds to balance budgets in future years but this doesn't help the DfE understand that schools are struggling financially”.

“Yes, provided the money clawed back is shared amongst schools who need this funding as we are supporting an immense amount of need in schools without any funding”.

“Straight into the high needs block”.

“As long as this is made clear to operate from a particular date. Also perhaps have a consideration if a school is taking an amount forward for a large planned project etc. A way needs to be found for the true extent of the state of finance in education to be seen. If large balances are held then the government has a strong argument not to increase funding”.

### **Against:**

“We do a lot of money raising and saving. Self generated income should be shown separately from our allocation”.

“Schools are holding balances to deal with in year unfunded and unknown increases (like recent staffing costs). In reality balances are probably being held to avoid financial difficulty in future. Schools should not be penalised for being financially stable and well controlled where they can be”.

“Whilst I appreciate that as a school, we have a carry forward above the proposed 10% budget share I disagree with the proposal of a claw back for the following reasons. As a school we have a number of large building projects about to be completed (roof) and the begin (drains). Whilst this has been funded via a capital project as a school, we have ensured that we have enough in our budget to support the payments needed and further improvements after the projects have been completed”.

“Inadequate information provided within the consultation to understand the level of detail would be required from schools with a surplus to evidence commitments in the coming years. Will the 3-year budget submissions be reviewed and the setting of in year deficit budgets be considered? Scheme for financing schools runs parallel with the financial year, therefore a clawback mechanism introduced within the 24/25 scheme should not clawback surpluses until 31<sup>st</sup> March 2025, so not be moving the goalposts on a surplus that relates to the 23/24 financial year. This would also ensure that schools don't feel encouraged to spend funds on arguably less critical resources to run down their balances before the end of the current financial year (in 5 months) in order to avoid more intense scrutiny in a public forum. This is an unintended consequence which puts at risk the public sector duty to achieve value for money”.

“As long as any surplus is accounted for i.e. there are plans for medium term projects/commitments, this should be fine. Not sure my voice should count for much on this question as an Academy!”

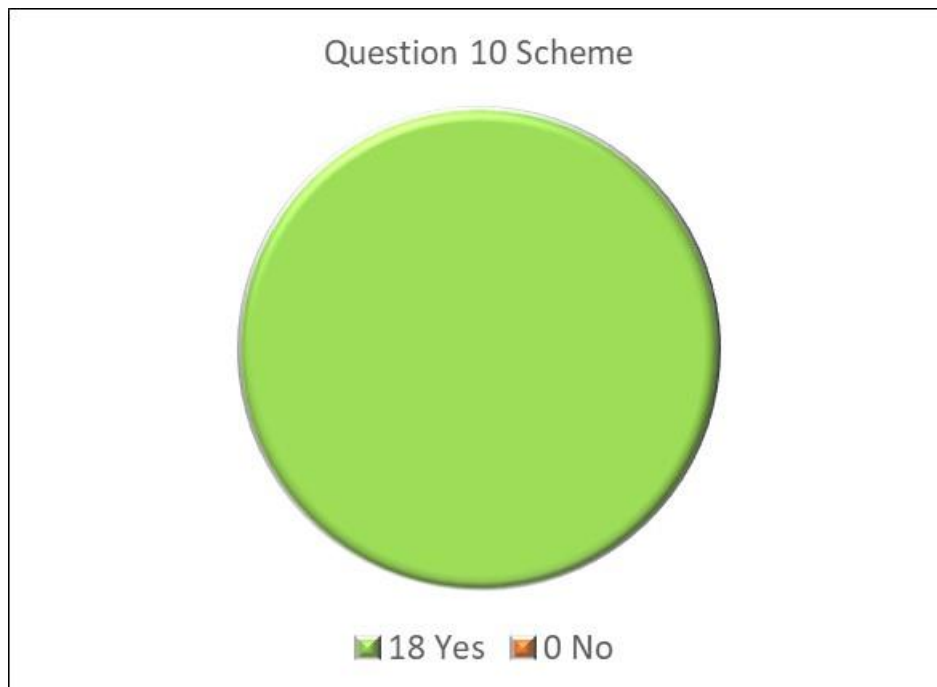
“Not relevant to academies, but if we were maintained, it would be ‘no’. Most schools understand the need to use their reserves for the benefit of existing pupils, but schools should be able to plan to spend reserves in the way they choose”.

**HFG recommendation:** The HFG would like to better understand the implications relating to the clawback. It was agreed that wider strategic implications should be better understood. This will allow the HFG to make a recommendation to Schools Forum based on a more thorough understanding of consequences not only for individual schools but also the wider school system.

The decision on this item will therefore come back to a future Schools Forum meeting.

### Question 10

Do you support the other changes to the Scheme for Financing Schools? Yes/No.



**HFG recommendation:** Adopt the changes to the scheme for 2023/24.

## 6. Next Steps

- 6.1 The results of the consultation will be discussed at Schools Forum, where a vote will be held.

## Budget for Additional Funds 2024-25

**Report being considered by:** Schools Forum on 4<sup>th</sup> December 2023

**Report Author:** Melanie Ellis

**Item for:** Decision                      **By:** All School Members/Forum Members

### 1. Purpose of the Report

1.1 To set out the proposed 2024-25 budgets for the Growth Fund and Additional High Needs fund.

### 2. Recommendations

- 2.1 Agree that the 2024-25 Department for Education (DfE) allocation for growth and falling rolls is distributed to all schools via the school formula. This is estimated to be in the region of £647k.
- 2.2 To set the Additional High Needs fund at £150k.

Is the Schools' Forum required to make a decision as part of this report or subsequent versions due to be considered later in the meeting cycle?	
Yes: <input checked="" type="checkbox"/>	No: <input type="checkbox"/>

### 3. Implications and Impact Assessment

Equalities Impact:	Positive	No Impact	Negative	Commentary
<b>A</b> Are there any aspects of the proposed decision, including how it is delivered or accessed, that could impact on inequality?		x		
<b>B</b> Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?		x		
<b>Data Impact:</b>		x		
<b>Consultation and Engagement:</b>	Heads' Funding Group			

## 4. Introduction

- 4.1 The main formula funding a school receives is retrospective and based on pupil numbers from the previous October census. Growth funding is allocated by the Department for Education (DfE) by formula and forms part of the Schools Block DSG allocation. It is allocated to meet the cost of increases in pre-16 pupil numbers either in new schools or bulge classes set up to meet basic need.
- 4.2 The formula for allocating growth funding to each local authority is based on the observed differences between the primary and secondary number on roll between the October 2022 and October 2023 school censuses. The growth is measured within each 'middle layer super output area' (MSOA). In West Berkshire there are 22 MSOAs. Changes in pupil numbers between the two censuses are identified for each MSOA, and any areas with a reduction in pupil numbers are discounted. Growth factor values are then applied:
- (1) £1,550 for each primary growth pupil
  - (2) £2,320 for each secondary growth pupil
  - (3) £76,195 for each new school which opened in the previous year.
- 4.3 In 2024-25 the DfE will allocate for the first time, funding based on growth and falling rolls. Falling rolls funding will be allocated based on the reduction in pupil numbers that MSOAs within each local authority's experience. It is based on the observed differences between the primary and secondary number on roll in each MSOA in a local authority between the most recent October pupil census (2023) and the census in the previous October (2022). Funding will be £140,000 for each MSOA which sees a 10% or greater reduction in the number of pupils on roll between the two census years. This allocation will be subject to an ACA.
- 4.4 Funding is set aside annually from the high needs block to fund schools with a disproportionate number of high needs pupils that meet the agreed criteria.

## 5. West Berkshire Growth & Falling Rolls Allocation Estimate 2024-25

- 5.1 The DfE issue a growth calculator to generate illustrative growth allocations for 2024-25. Pupil numbers by school (September 2023) have been provided by the Education Place Planning team based upon school ESS SIMS data. These have been checked for reasonableness but there may obviously be some variation to those recorded on the October 2023 census.
- 5.2 Although there is a decrease in primary pupil numbers within the authority, three of the MSOA's have an overall growth (70 pupils in total), thereby generating eligible primary growth.
- 5.3 There is actual growth in secondary school pupil numbers. Four of the MSOA's have an overall growth in secondary pupils (163 pupils in total), thereby generating eligible secondary growth.
- 5.4 One MSOA has a reduction in primary pupils greater than 10%. Based upon the estimated figures, £140k of primary falling rolls funding will be generated. NB the decrease for this MSOA is just over 10%, so an increase of 3 pupils in the actual census count compared to the estimate would prevent this funding.

5.5 The illustrative growth & falling rolls allocation for 2024-25 is £647k. The actual value will be confirmed in December 2023.

	Eligible primary growth (a)	Eligible secondary growth (b)	ACA (c)	Allocation for primary growth (a)*(c)* £1,550	Allocation for secondary growth (b)*(c) *£2,320	Total illustrative growth allocation	Primary falling rolls funding (incl ACA)	Total illustrative growth and falling rolls allocation
<b>2024-25 Estimate</b>	70	163	1.036065	£111,610	£390,596	£502,206	£145,049	£647,256
<b>2023-24 Actual</b>	166	266	1.0348	£260,315	£625,033	£885,347		£885,347

## 6. Growth Fund

- 6.1 The Schools Forum must be consulted on the total size of the growth fund and criteria for use. The criteria formed part of the Schools Funding consultation and was supported.
- 6.2 As it is within the schools block, a movement of funding between the schools formula and the growth fund is not treated as a transfer between blocks. If funding is not required for growth, it can be added into the school formula, but if there is a shortfall, this needs to be met from a top slice of the main schools' block allocation.
- 6.3 The growth fund balance at 31.03.23 was £996.7k. Support for Highwood Copse will continue be drawn from the fund over the next two year years, estimated to be around £139k between 2023-25. Additionally, some of the allocated growth fund will need to be used annually to support Highwood Copse as a growing school. This is because the funding allocated by the DfE via the Authority Proforma Tool (APT) is based upon lagged pupil numbers and, as such, as an authority we will need to estimate and fund the increase in pupil numbers each year.
- 6.4 The table below shows the estimated draw on the growth fund up to 31.3.25. Based upon the unconfirmed pupil data, in addition to the agreed Highwood underwriting, Trinity School may also be eligible for growth funding in 2023-24. A contingency has been built in to cover two cases per year. This gives an estimated balance of £532k at 31.03.25 prior to adding any 2024-25 growth allocation, estimated at £502k.

	Diseconomies of Scale	Growth	Balance
<b>Balance 31.03.23</b>			<b>-996,735</b>
<i>Highwood Underwriting</i>	80,950		-915,785
<i>Contingency</i>		148,400	-767,385
<b>Est Balance 31.03.24</b>			<b>-767,385</b>
<i>Highwood Underwriting</i>	58,300		-709,085
<i>Contingency</i>		176,640	-532,445
<b>Est Balance 31.03.25</b>			<b>-532,445</b>

- 6.5 In 2023-24, it was agreed that the projected balance of the growth fund was sufficient and the 2023-24 allocation was added into the school formula and allocated to schools and not used to further increase the growth fund.

6.6 Based upon the projected growth fund balance at 31.03.25, it is proposed to once again add the DSG growth funding allocation for 2024-25 into the school formula and allocate to schools. Some of this estimated £502k allocation will be required to support the increase in pupil numbers at Highwood Copse (Sept 2024 - March 2025) via the APT. This is estimated to be in the region £70k. The remainder would be distributed to all schools.

6.7 A summary table is shown below:

Growth Fund	Top up £	Spend £	Cumulative Balance £
2019/20	655,800	183,048	665,962
2020/21	904,945	69,836	1,501,071
2021/22	0	217,640	1,283,431
2022/23	0	286,696	996,735
2023/24 to date	0	51,404	945,331

## 7. Falling Rolls Fund

7.1 2024-25 is the first year the DfE will allocate funding based on growth and falling rolls. The forecast allocation for falling rolls is £140k.

7.2 LA's continue to have discretion over whether to operate a falling rolls fund. Where LA's operate a fund, they will only be able to provide funding where the 2022 school capacity data (SCAP) shows that school places will be required in the subsequent 3 to 5 years. This SCAP requirement replaces previous guidance that funding may only be used where local planning data shows that the surplus places will be needed within the next 3 financial years.

7.3 The decision as to whether a Falling Rolls fund should be reinstated formed part of the Schools Funding consultation. Although there was some support, the majority did not want a falling rolls fund. If it were to be reinstated then the Schools Forum would need to agree both the value of the fund and the criteria for allocation. If not reinstated, it would be proposed to add the £140k into the funding formula for distribution.

## 8. Additional High Needs Funding

8.1 Funding needs to be set aside from the high needs block in order to fund those schools qualifying for additional high needs funding. It is proposed that be increased to £150k.

Additional High Needs Funding	Budget £	Spend £
2018/19	100,000	83,609
2019/20	100,000	68,001
2020/21	100,000	33,550
2021/22	40,000	51,609
2022/23	42,000	86,321
2023/24	65,000	170,000
2024/25	150,000	

## 9. Proposals

- To distribute the 2024-25 growth and falling rolls DfE allocation to all schools via the school formula.
- To set the Additional High Needs fund at £150k.

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## De-delegation, Education Functions and Health and Safety Service Proposals 2024/25

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**Report being considered by:** Schools Forum on 4<sup>th</sup> December 2023

**Report Author:** Lisa Potts

**Item for:** Decision **By:** All Maintained School Members

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### 1. Purpose of the Report

1.1 This report sets out the details, cost, and charges to schools of the services on which maintained school representatives are required to vote (on an annual basis).

### 2. Recommendations

2.1 That representatives of maintained primary and secondary schools choose a basis to recharge the cost of the Ethnic Minority Service. This can either be based on students with English as an additional language (EAL) or pupil census data.

2.2 That representatives of maintained primary schools should agree to de-delegate funds in the 2024/25 financial year for:

- Behaviour Support Services
- Ethnic Minority Support
- Trade Union Representation
- CLEAPSS
- School Improvement
- Statutory and Regulatory Duties comprising:
  - Statutory accounting functions in respect of schools
  - Internal Audit of schools
  - Administration of pensions for school staff
- Health and Safety Service to Schools

2.3 That representatives of maintained secondary schools should agree to de-delegate funds in the 2024/25 financial year for:

- Behaviour Support Services
- Ethnic Minority Support
- Trade Union Representation
- CLEAPSS
- School Improvement
- Statutory and Regulatory Duties comprising:
  - Statutory accounting functions in respect of schools
  - Internal Audit of schools
  - Administration of pensions for school staff
- Health and Safety Service to Schools

2.4 That representatives of maintained special, nursery and PRU heads should agree to de-delegate funds in the 2024/25 financial year for:

- Trade Union Representation
- CLEAPSS (Special schools and PRU only)
- Statutory and Regulatory Duties comprising:
  - Statutory accounting functions in respect of schools
  - Internal Audit of schools
  - Administration of pensions for school staff
- Health and Safety Service to Schools

## 2.5 Summary of proposals

	2024/25 Primary Budget £	Agreed by HFG	2024/25 Secondary Budget £	Agreed by HFG	2024/25 Early Years & High Needs Budgets £	Agreed by HFG
Therapeutic Thinking Support	£199,911	Yes	£61,503	Yes	n/a	n/a
Ethnic Minority Support (EAL)	£178,260	No	£7,910	No	n/a	n/a
Ethnic Minority Support (census)	£142,370	Yes	£43,800	Yes	n/a	n/a
Trade Union Representation	£52,076	Yes	£16,021	Yes	£2,343	Yes
CLEAPSS	£2,086	Yes	£1,392	Yes	£80*	Yes
School Improvement and Governor Support	£222,829	Yes	£68,554	Yes	n/a	n/a
Education Functions	£108,074	Yes	£33,249	Yes	£4,862	Yes
Health & Safety services to schools	As per banding	Yes	As per banding	Yes	As per banding	Yes

\*special schools only

Is the Schools' Forum required to make a decision as part of this report or subsequent versions due to be considered later in the meeting cycle?	
Yes: <input checked="" type="checkbox"/>	No: <input type="checkbox"/>

## 3. Implications and Impact Assessment

Equalities Impact:				Commentary
	Positive	No Impact	Negative	
A Are there any aspects of the proposed decision, including how it is delivered or accessed, that could impact on inequality?		X		

<b>B</b> Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?		X		
<b>Data Impact:</b>		X		
<b>Consultation and Engagement:</b>	Melissa Perry, Michelle Sancho, Rose Carberry, Mike Lindburn,			

#### 4. Introduction/Background

- 4.1 This report sets out the details, cost, and charges to schools of the services on which maintained school representatives are required to vote (on an annual basis).
- 4.2 De-delegated services consist of Behaviour Support, Ethnic Minority Support, Trade Union Local Representation, Consortium of Local Education Authorities for the Provision of Science Services (CLEAPSS) and School Improvement
- 4.3 Education functions consist of the statutory and regulatory duties held by the local authority in respect of maintained schools.
- 4.4 The Health and Safety service provides a compliance, advice and training role for schools.
- 4.5 In the consultation held with schools between 20<sup>th</sup> October 2023 to 10<sup>th</sup> November 2023, the following question was asked:

*Do you agree with the proposed De-delegated Services, Education Functions and Health and Safety Service for all maintained schools? Yes/No*

There were 18 responses received, 18 yes and 0 no.

#### 5. Supporting Information on De-delegated services

- 5.1 De-delegated services are for maintained schools only. Funding must be allocated through the formula but can be passed back, or de-delegated for maintained primary and secondary schools with Schools Forum approval.
- 5.2 Funds cannot be de-delegated from Special and Nursery Schools and PRUs for these services, but those schools will have the option to buy back these services at a cost based on the same amount per pupil as for primary and secondary schools. Academies may also be given the option to buy into the service.
- 5.3 The schools funding regulations for 2024/25 have now been published and these confirm that similar arrangements for de-delegation of the cost of these services will apply for 2024/25.

5.4 Primary and secondary school representatives are required to recommend to Schools Forum on whether each service is to be de-delegated or not. The services below were de-delegated in 2023/24 and are proposed to be de-delegated in 2024/25:

**Primary and Secondary only:**

- Behaviour Support Services
- Ethnic Minority Support
- Trade Union Local Representation
- CLEAPSS
- School Improvement

## 6. Therapeutic Thinking Service

6.1 The Therapeutic Thinking Service proposal for 2024/25 is set out in Appendix B.

6.2 Table 1 shows the budget and unit charge for 2024/25 compared to 2023/24. The total cost will be divided by the total numbers of pupils in the October 2023 census to determine a unit charge per pupil on which the de-delegated amount per school will be based. As all schools will have access to all aspects of the service, the same unit charge will apply to both primary and secondary schools. Based on the October 2023 census the cost is £18.21 per pupil.

TABLE 1	2023/24			2024/25		
	Number of pupils	Unit Charge per pupil	Budget	Number of pupils	Unit Charge per pupil	Budget
Maintained Primary Schools	11,315	£17.56	£198,721	10,980	£18.21	£199,911
Maintained Secondary Schools	3,398	£17.56	£59,678	3,378	£18.21	£61,503
<b>Total</b>			<b>£258,399</b>			<b>£261,414</b>

## 7. Ethnic Minority and Traveller Achievement Service

7.1 The detail of the Ethnic Minority and Traveller Achievement Service (EMTAS) is set out in Appendix C.

7.2 Previous years have seen the total cost divided by the number of EAL pupils, but Heads Funding Group requested to see what the costs could look like based on the October Census number instead, which are shown in table 3 and Appendix A.

7.3 Table 2 shows the budget and the unit charge for the service for 2024/25 compared to 2023/24. The total cost in respect of Primary and Secondary schools has previously been divided by the total number of pupils recorded as having English as an additional language (EAL) in the October 2023 census to determine a unit charge per EAL pupil on which the de-delegated amount per school will be based. Based on the October 2022 census this is estimated to be £212.64 per pupil but the final rate will be determined according to the number of EAL pupils in the October 2023 census, which has not yet been confirmed.

TABLE 2	2023/24			2024/25		
	Number of pupils	Unit Charge per pupil with EAL	Budget	Number of pupils	Unit Charge per pupil with EAL	Budget
Maintained Primary Schools	838	£213.61	£184,145	838	£212.64	£178,260
Maintained Secondary Schools	37	£213.61	£2,873	37	£212.64	£7,910
			<b>£187,018</b>			<b>£186,170</b>

- 7.4 Table 3 shows the budget and the unit charge for the service for 2024/25 compared to 2023/24. The total cost in respect of Primary and Secondary schools could be divided by the total numbers of pupils in the October 2023 census to determine a unit charge per pupil on which the de-delegated amount per school could be based. Based on the October 2023 census the cost is £12.97 per pupil.

TABLE 3	2023/24			2024/25		
	Number of pupils	Unit Charge per pupil with EAL	Budget	Number of pupils	Unit Charge per pupil	Budget
Maintained Primary Schools	838	£213.61	£184,145	10,980	£12.97	£142,370
Maintained Secondary Schools	37	£213.61	£2,873	3,378	£12.97	£43,800
			<b>£187,018</b>			<b>£186,170</b>

- 7.5 As all schools will have access to all aspects of the service, the same unit charge will apply to both primary and secondary schools.
- 7.6 Schools Forum would need to determine whether to divide the cost by the EAL numbers or by the number of pupils on the October census.

## 8. Trade Union Representation

- 8.1 The detail of the service provided by Trade Union representatives to schools is set out in Appendix D.
- 8.2 Table 4 shows the budget and unit charge for the service for 2024/25 compared to 2023/24. The proposal for 2024/25 is based on the cost of 1FTE supply teacher on UPS3. The total net cost in respect of primary and secondary schools will be divided by the total number of pupils in the October 2023 census to determine a unit charge per pupil on which the de-delegated amount per school will be based on. As all schools have access to all representatives (regardless of which school they are based in), the same unit charge will apply to both primary and secondary schools. Based on the October 2023 census the charge will be £4.74 per pupil.

TABLE 4	2023/24			2024/25		
	Number of pupils	Unit Charge per pupil	Budget	Number of pupils	Unit Charge per pupil	Budget
Maintained Primary Schools	11,315	£4.34	£49,077	10,980	£4.74	£52,076
Maintained Secondary Schools	3,398	£4.34	£14,738	3,378	£4.74	£16,021
			<b>£63,815</b>			<b>£68,097</b>

## 9. Consortium of Local Education Authorities for the Provision of Science Services (CLEAPSS)

9.1 The detail of the service provided by this subscription is set out in Appendix E.

9.2 As the actual pricing from CLEAPSS will not be available until after the schools budget has been set, an assumption has been made on the 2024/25 fee. Any over or under spend will be recovered the following year, as in all de-delegated services. Table 5 shows the budget and unit charge for the service for 2024/25 compared to 2023/24. The unit charge includes the administration fee. Note that secondary schools will need to pay the fee relating to sixth form pupils separately as de-delegation is based on pre 16 pupils only.

TABLE 5	2023/24				2024/25			
	Number of pupils	Unit Charge per pupil	Charge per school	Budget	Number of pupils	Est Unit Charge per pupil	Est Charge per school	Estimated Budget
Maintained Primary Schools	11,315	£0.17		£1,924	10,980	£0.19		£2,086
Maintained Secondary Schools	3,398	£0.17	£235	£1,283	3,378	£0.19	£250	£1,392
				<b>£3,206</b>				<b>£3,478</b>

## 10. School Improvement Team

10.1 The detail of the service provided by the School Improvement Team is set out in Appendix F.

10.2 Since 2017, the School Improvement Team has been funded by a grant. A consultation in 2021 by the DFE set out new funding for the service. From 2023/24 onwards the service is to be fully funded via de-delegation.

10.3 Table 6 shows the budget and unit charge for the service for 2024/25 compared to 2023/24. The total cost will be divided by the total numbers of pupils in the October 2023 census to determine a unit charge per pupil on which the de-delegated amount per school will be based. As all schools will have access to all aspects of the service, the same unit charge will apply to both primary and secondary schools. Based on the October 2023 census the charge will be £20.29 per pupil.

TABLE 6	2023/24			2024/25		
	Number of pupils	Unit Charge per pupil	Budget	Number of pupils	Unit Charge per pupil	Budget
Maintained Primary Schools	11,315	£14.20	£160,713	10,980	£20.29	£222,829
Maintained Secondary Schools	3,398	£14.20	£48,264	3,378	£20.29	£68,554
			<b>£208,977</b>			<b>£291,383</b>

## 11. Education Functions for Maintained Schools

11.1 Education responsibilities held by local authorities for **all** schools are funded from the Central Schools Services Block of the DSG. Education functions held by local authorities for **maintained schools only** can be funded from maintained schools

budget shares and de-delegated, with agreement of the maintained schools members of schools forums.

11.2 Education functions consist of the statutory and regulatory duties held by the local authority in respect of maintained schools. These consist of Accountancy, Internal Audit and Pension scheme administration. The Accountancy, audit and pension administration services are described in appendix G.

11.3 Representatives of all maintained schools (including Special and Nursery Schools and PRUs) are required to recommend to Schools Forum whether or not these services should be funded from maintained school budget shares and de-delegated for 2024/25:

**All Maintained Schools:**

- Statutory and Regulatory Duties comprising:
  - Statutory accounting functions in respect of schools
  - Internal Audit of schools
  - Administration of pensions for school staff

11.4 Academies and other non-maintained schools also may be able to choose to buy into any of the above services subject to service provider agreement.

11.5 Table 7 shows the budget and estimated unit charges for these services in 2024/25 compared to 2023/24. The total cost will be divided by the total numbers of pupils in the October 2023 census to determine a unit charge per pupil on which the de-delegated amount per school will be based. The same unit charges will apply to both primary and secondary schools. Based on the October 2023 census the charge will be £9.84 per pupil.

TABLE 7	2023/24		2024/25				
	Charge per Pupil	Budget	Unit Charge per pupil	Total Budget	Primary Budget	Secondary Budget	Budget for Nursery, Special Schools and PRUs
Accountancy	£3.47	£52,626	£3.68	£54,607	£40,371	£12,420	£1,816
Audit	£3.49	£52,911	£3.55	£52,781	£39,021	£12,005	£1,756
Pension Scheme Administration	£2.36	£35,864	£2.61	£38,797	£28,682	£8,824	£1,290
<b>Total Education Functions</b>	<b>£9.32</b>	<b>£141,401</b>	<b>£9.84</b>	<b>£146,185</b>	<b>£108,074</b>	<b>£33,249</b>	<b>£4,862</b>

## 12. Health and Safety Service to Schools

12.1 As the Council is the employer and therefore the principal legal duty holder (notwithstanding any delegated responsibilities to a schools, Head Teachers and Governors) in relation to health and safety, it makes sense to ensure an adequate, effective and efficient health and safety service is provided to all Local Authority maintained schools and a buy-back option offered to non-maintained schools.

- 12.2 The Health and Safety Team provide a compliance, advice and training role for schools and the Team continue to be heavily involved in assisting schools developing and reviewing covid secure arrangements, plans and risk assessments.
- 12.3 Following a decision to change the way the service operated in 2020/21, for the last year all maintained schools have had the Level Two (Enhanced) service. This is a comprehensive health and safety support service and covers all aspects of health and safety management and support including necessary health and safety training.
- 12.4 It is proposed to provide the full schools health and safety service to all maintained schools, continuing on from the previous year. This will meet the requirements of the employer under the Health and Safety at Work etc. Act 1974 and the Management of Health and Safety at Work Regulations and other related legislation.
- 12.5 Schools will pay a graduated fee based on pupil numbers for the Level 1 element of the service and a top up cost to cover the combined service. All maintained schools will need to agree to be part of this collective agreement to equitably fund the service.
- 12.6 A buy-back option would continue to be offered to schools such as academy and independent schools. Income generated from buy-back services would be invested in the service or offset to reduce costs for the schools in the collective agreement.
- 12.7 Table 9 below shows the 2023/24 cost if all Local Authority maintained schools, Voluntary Controlled, Voluntary Aided and special schools agree to one equal service.

Pupil No's	Band A 0-60	Band B 61 - 100	Band C 101-200	Band D 201-300	Band E 301-650	Band F 650+	Band G Secondary
21/22	£800.00	£1,300.00	£1,600.00	£2,000.00	£2,600.00	£4.47 Per pupil	£4.47 Per pupil
22/23	£800.00	£1,300.00	£1,600.00	£2,000.00	£2,600.00	£4.57 Per pupil	£4.57 Per pupil
23/24	£832.00	£1,352.00	£1,664.00	£2,080.00	£2,704.00	£6 Per Pupil	£6 Per Pupil
24/25	£881.92	£1,433.12	£1,763.84	£2,204.80	£2,866.24	£6.24 Per Pupil	£6.24 Per Pupil

### 13. Proposals

- 13.1 The proposals set out in this report have been included in the consultation with all schools on the proposed school funding arrangements for 2024/25.

### 14. Appendices

- 14.1 Appendix A – De-delegations per school for 2024/25
- 14.2 Appendix B - Therapeutic Thinking Support Service
- 14.3 Appendix C - Ethnic Minority & Traveller Achievement Service
- 14.4 Appendix D – Trade Union Representation Service



14.5 Appendix E – CLEAPSS Service

14.6 Appendix F – School Improvement Team

14.7 Appendix G – Accountancy, Audit and Pension Administration (Education Functions)

14.8 Appendix H - Health and Safety service to schools

14.9 Appendix I – Health and Safety Service 2024-25

14.10 Appendix J – Legal Duty Holders for Health & Safety

FINAL De-Delegations for 2024/25 - Based on October 2023 Census Data											
	De-delegations							Education functions for maintained schools			
	Therapeutic Thinking	Ethnic Minority Support (EAL)	Ethnic Minority Support (census)	Trade Union Representation	CLEAPSS	School Improvement & Governor Support	Statutory Accounting Functions	Internal Audit of Schools	Pension Scheme Administration		
Proposed Primary Delegation	£199,911	£178,260	£142,370	£52,076	£2,086	£222,829	£40,371	£39,021	£28,682		
Proposed Secondary Delegation	£61,503	£7,910	£43,800	£16,021	£1,392	£68,554	£12,420	£12,005	£8,824		
<b>Total Proposed Delegation</b>	<b>£261,414</b>	<b>£186,170</b>	<b>£186,170</b>	<b>£68,097</b>	<b>£3,478</b>	<b>£291,383</b>	<b>£52,791</b>	<b>£51,025</b>	<b>£37,507</b>		
Estimated income from other maintained schools	£0	£0	£0	£2,343	£80	£0	£1,816	£1,756	£1,290		
<b>Total Cost of Service</b>	<b>£261,414</b>	<b>£186,170</b>	<b>£186,170</b>	<b>£70,440</b>	<b>£3,558</b>	<b>£291,383</b>	<b>£54,607</b>	<b>£52,781</b>	<b>£38,797</b>		
Cost per primary pupil	£18.21	£212.64	£12.97	£4.74	£0.19	£20.29	£3.68	£3.55	£2.61		
Cost per secondary pupil	£18.21	£212.64	£12.97	£4.74	£0.19	£20.29	£3.68	£3.55	£2.61		
Cost per other maintained school pupil	n/a	£212.64	£12.97	£4.74	£0.19	£20.29	£3.68	£3.55	£2.61		
Fixed cost per secondary school	n/a	n/a	n/a	n/a	£250.00	n/a	n/a	n/a	n/a		
School	Pupil No's	EAL No's									
Aldermaston C.E. Primary School	103	4.4	1,675	928	1,336	489	20	2,090	379	366	269
Basildon C.E. Primary School	150	6.9	2,731	1,466	1,945	711	29	3,044	552	533	392
Beedon C.E. (Controlled) Primary School	35	2.2	637	468	454	166	7	710	129	124	91
Beenham Primary School	58	14.7	1,056	3,116	752	275	11	1,177	213	206	152
Birch Copse Primary School	414	14.1	7,538	2,998	5,368	1,964	79	8,402	1,522	1,471	1,081
Bradfield C.E. Primary School	148	1.1	2,695	240	1,919	702	28	3,004	544	526	387
Brightwalton C.E. Aided Primary School	93	2.3	1,693	490	1,206	441	18	1,867	342	331	243
Brimpton C.E. Primary School	53	0.0	985	0	687	251	10	1,076	195	188	138
Bucklebury C.E. Primary School	107	2.4	1,948	504	1,387	507	20	2,171	393	380	280
Burghfield St Mary's C.E. Primary School	190	4.6	3,459	984	2,464	901	36	3,858	699	675	496
Calcot Infant School and Nursery	191	44.2	3,478	9,401	2,477	906	36	3,876	702	679	499
Calcot Junior School	273	22.0	4,970	4,678	3,540	1,295	52	5,540	1,004	970	713
Chaddfeworth St Andrew's C.E. Primary School	27	0.0	492	0	350	128	5	548	99	96	71
Chieveley Primary School	177	3.5	3,223	743	2,295	839	34	3,592	651	629	462
Cold Ash St Mark's CE Primary School	195	2.4	3,550	507	2,528	925	37	3,957	717	693	509
Compton C.E. Primary School	179	4.5	3,259	949	2,321	849	34	3,633	658	636	468
Cumidge Primary School	82	14.0	1,493	2,956	1,063	389	16	1,664	301	291	214
Downsway Primary School	212	4.7	3,860	990	2,749	1,005	40	4,302	779	753	554
Erborne C.E. Primary School	75	4.7	1,366	992	972	356	14	1,522	276	267	196
Englefield C.E. Primary School	109	4.7	1,985	997	1,413	517	21	2,212	401	387	285
Falkland Primary School	420	18.7	7,647	3,987	5,446	1,992	80	8,524	1,544	1,493	1,097
Garland Junior School	220	10.2	4,006	2,173	2,853	1,043	42	4,465	809	782	575
Hampstead Norreys C.E. Primary School	67	1.1	1,220	235	869	318	13	1,360	246	238	175
Hermitage Primary School	188	5.7	3,423	1,202	2,438	892	36	3,815	691	668	491
Hungerford Primary School	346	10.5	6,300	2,237	4,486	1,641	66	7,022	1,272	1,230	904
The Ilsleys Primary School	53	3.4	965	722	687	251	10	1,076	195	188	138
Inkpen Primary School	48	6.3	874	1,348	622	228	9	974	176	171	125
John Rankin Infant and Nursery School	220	26.3	4,006	5,598	2,853	1,043	42	4,465	809	782	575
John Rankin Junior School	358	14.1	6,518	2,994	4,642	1,698	68	7,265	1,316	1,272	935
Kennet Valley Primary School	194	22.1	3,532	4,694	2,515	920	37	3,937	713	689	507
Kintbury St Mary's C.E. Primary School	130	6.7	2,367	1,418	1,686	617	25	2,638	478	462	340
Long Lane Primary School	209	14.0	3,805	2,968	2,710	991	40	4,241	768	743	546
Mortimer St Mary's C.E. Junior School	176	8.0	3,204	1,701	2,282	835	33	3,572	647	625	460
Mortimer St. John's C.E. Infant School	243	9.1	4,424	1,930	3,151	1,153	46	4,931	893	864	635
Mrs Bland's Infant School	148	37.4	2,695	7,957	1,919	702	28	3,004	544	526	387
Pangbourne Primary School	164	6.7	2,986	1,432	2,126	778	31	3,328	603	583	428
Parsons Down Infant School	90	18.8	1,639	4,004	1,167	427	17	1,828	331	320	236
Parsons Down Junior School	184	7.1	3,350	1,514	2,386	873	35	3,734	677	654	481
Purley CoE Primary School	93	3.6	1,693	762	1,206	441	18	1,867	342	331	243
Robert Sandlands Primary School and Nursery	213	23.2	3,878	4,927	2,762	1,010	40	4,323	783	737	556
Shaw-cum-Donnington C.E. Primary School	95	7.8	1,730	1,668	1,232	451	18	1,928	349	338	248
Shefford C.E. Primary School	52	1.1	947	229	674	247	10	1,055	191	185	136
Springfield Primary School	304	20.8	5,535	4,413	3,942	1,442	58	6,169	1,118	1,080	794
Spurcroft Primary School	382	25.5	6,955	5,428	4,953	1,812	73	7,752	1,405	1,358	998
St Finian's Catholic Primary School	201	8.2	3,660	1,747	2,606	953	38	4,079	739	714	525
St John the Evangelist CoE Infant and Nursery School	179	55.5	3,259	11,802	2,321	849	34	3,633	658	636	468
St Joseph's Catholic Primary School	213	83.6	3,878	17,767	2,762	1,010	40	4,323	783	737	556
St Nicolas C.E. Junior School	258	19.0	4,697	4,040	3,345	1,224	49	5,236	949	917	674
St Paul's Catholic Primary School	298	46.3	5,426	9,853	3,864	1,413	57	6,048	1,096	1,059	778
Stockcross C.E. School	73	3.2	1,329	675	947	346	14	1,481	268	259	191
Strealey C.E. Voluntary Controlled School	99	3.4	1,802	718	1,284	470	19	2,009	364	352	259
Sulhamstead and Ulton Nerve School	99	1.2	1,802	252	1,284	470	19	2,009	364	352	259
Thatcham Park CoE Primary	320	21.5	5,826	4,574	4,149	1,518	61	6,494	1,177	1,137	836
Theale C.E. Primary School	314	10.5	5,717	2,229	4,071	1,489	60	6,372	1,154	1,116	820
Wellford and Wickham C.E. Primary School	66	1.1	1,202	229	856	313	13	1,339	243	235	172
Westwood Farm Infant School	186	22.2	3,386	4,719	2,412	882	35	3,775	684	661	486
Westwood Farm Junior School	238	11.0	4,333	2,339	3,086	1,129	45	4,830	875	846	622
The Willows Primary School	349	22.5	6,354	4,782	4,525	1,655	66	7,083	1,283	1,240	912
The Wincombe School	425	62.7	7,738	13,325	5,511	2,016	81	8,625	1,563	1,510	1,110
Woolhampton C.E. Primary School	100	0.0	1,821	0	1,297	474	19	2,029	368	355	261
Yattendon C.E. Primary School	94	1.2	1,711	255	1,219	446	18	1,908	346	334	246
The Downs School	1,046	9.1	19,044	1,935	13,563	4,961	449	21,228	3,846	3,717	2,732
Little Heath School	1,316	13.1	23,960	2,786	17,064	6,242	500	26,707	4,839	4,677	3,438
The Willink School	1,016	15.0	18,498	3,190	13,174	4,819	443	20,619	3,736	3,611	2,654
<b>PRIMARY TOTAL</b>	<b>10,980</b>	<b>838.31</b>	<b>199,911</b>	<b>178,260</b>	<b>142,370</b>	<b>52,076</b>	<b>2,086</b>	<b>222,829</b>	<b>40,371</b>	<b>39,021</b>	<b>28,682</b>
<b>SECONDARY TOTAL</b>	<b>3,378</b>	<b>37.20</b>	<b>61,503</b>	<b>7,910</b>	<b>43,800</b>	<b>16,021</b>	<b>1,392</b>	<b>68,554</b>	<b>12,420</b>	<b>12,005</b>	<b>8,824</b>
<b>TOTAL ALL PRIMARY AND SECONDARY SCHOOLS</b>	<b>14,358</b>	<b>875.5</b>	<b>261,414</b>	<b>186,170</b>	<b>186,170</b>	<b>68,097</b>	<b>3,478</b>	<b>291,383</b>	<b>52,791</b>	<b>51,025</b>	<b>37,507</b>
<b>Other Maintained Schools</b>											
Hungerford Nursery	36.58		n/a	n/a	n/a	173	n/a	n/a	134	130	96
Victoria Park Nursery	35		n/a	n/a	n/a	168	n/a	n/a	130	126	92
<b>Total within Early Years Block</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>341</b>	<b>0</b>	<b>0</b>	<b>265</b>	<b>256</b>	<b>188</b>
Brookfields Special School	185		n/a	0	0	877	35	0	680	657	483
The Castle Special School	146		n/a	0	0	692	28	0	537	519	381
l-college	91		n/a	0	0	432	17	0	335	323	238
<b>Total Within High Needs Block</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>2,001</b>	<b>80</b>	<b>0</b>	<b>1,552</b>	<b>1,500</b>	<b>1,102</b>
<b>Total for All Other Maintained Schools</b>	<b>493.98</b>	<b>0.0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>2,343</b>	<b>80</b>	<b>0</b>	<b>1,816</b>	<b>1,756</b>	<b>1,290</b>
<b>Total all Maintained Schools</b>	<b>14,852</b>	<b>876</b>	<b>261,414</b>	<b>186,170</b>	<b>186,170</b>	<b>70,440</b>	<b>3,558</b>	<b>291,383</b>	<b>54,607</b>	<b>52,781</b>	<b>38,797</b>

## West Berkshire Council Maintained Schools

### Proposal to De-Delegate Formula Funding 2024/25

#### Therapeutic Thinking Support Team

#### Outline of Proposed Service 2024/25

The Therapeutic Thinking Support Team (TTST) offers evidence-based advice and support to schools through promotion of a Therapeutic approach and analysis tools. The type of involvement includes whole school support, staff training, staff support, class or year group support, as well as individual support.

#### Key Features

1. Quick and flexible response for schools who have pupils presenting with difficult and dangerous behaviours.
  2. Different levels of response within the team (whole school, group, individual).
  3. Support and advice in relation to Therapeutic Thinking; developing therapeutic plans as a result of analysis tools such as anxiety mapping, conscious and subconscious checklists, therapeutic tree
- 
1. The Team –
    - Dr Beth Cartwright (TTST Manager & Senior EP)
    - Robyn Stevens (Assistant EP)
    - Sue Butcher (Primary TTST Adviser)
    - Kayleigh Chocian (SEMH Practitioner)
    - Jessica Durham (SEMH Practitioner)
    - Madeleine Williams (SEMH Practitioner)
    - Vacancy* (SEMH Practitioner); starting October 2023
    - Roslyn Arthur (Exclusions Officer)
  2. Rapid Response: capacity to respond rapidly to school concerns. This could relate to children but also whole school situations that arise. Anti-social behaviour would be the main focus but wouldn't exclude other complex situations.
  3. For those needing some quick advice, signposting, or consultation, Beth or Roslyn are available for telephone consultations.
  4. TTST referrals will be triaged weekly and the most appropriate level of support offered within 5 days.
  5. The team will be informed by evidence based practice and the Therapeutic Thinking approach, which will result in clear suggestions of what needs to happen to move the situation forward.

6. Partners and working relationships: In partnership with other agencies Beth will continue to develop a clear referral pathway for social emotional and mental health issues. This will include consideration of EHA, iCollege, EPS, EWS, and ASD support teachers.
7. All of the above sits neatly with Local Authority social and emotional mental Health and well-being agenda and restorative themes.

### **What would schools get?**

1. A stepped approach using the Therapeutic Thinking flowchart to support analysis and help identify appropriate strategies and interventions, which is likely to often lead to writing or revision of a mini or full Therapeutic plan.
2. Having identified a child or young person's need following consultation and use of the Therapeutic Thinking tools, a SEMH Practitioner may offer an intervention to develop the unmet need, e.g. Social skills through Lego Therapy,
3. Support in developing Small garden provision as well as support to transition pupils back into the classroom, when appropriate
4. More direct support with very complex cases involving a wide range of services.
5. Support from practitioners where appropriate to help implement/model strategies in school.
6. Access to support for challenging whole school situations through advisers with senior level management experience and experienced educational psychologists.
7. Teacher consultations and support from the Adviser or EP
8. Write up and actions as well as agreed review of cases where appropriate.
9. Direct links into PPP (Pupil Placement Panel & Fair Access process), VCF (Vulnerable Children's Fund), Therapeutic Thinking funding and other relevant systems/services
10. Links with other support services and help in securing necessary actions
11. Clear information of key personnel and agencies within West Berkshire –regularly updated.
12. Training in some interventions so that school staff can deliver SEMH interventions to pupils
13. Team Teach (level 1) training available at a Local Authority level
14. A recorded de-escalation training for whole schools

15. Access to circle of adults meetings facilitated by an Assistant Educational Psychologist or a SEMH Practitioner for pupils at risk of permanent exclusion. A Circle of Adults meeting is led by 2 trained workers and involves key staff and professionals from the school. It lasts 1.5 – 2 hours and provides a structured approach to problem-solving and identifying agreed strategies.

### Feedback from 2022/2023 delivery

Evaluations have only just been requested, but with the schools that have already completed our evaluation, the response has been positive.

- 86% of respondents found TTST involvement extremely or very helpful

*'The team are very knowledgeable and supportive. They work well with the staff and parents and have built good relationships with the children and staff'*

- Schools in particular valued:
  - Receiving general advice and strategies
  - SEMH Practitioners running interventions for pupils
  - Class support

Schools generally noticed an improvement in pupil wellbeing and reduction in anti-social behaviours following TTST involvement, and particularly commented on being given the tools and strategies at support pupil emotional regulation.

#### Additional testimonials:

*'All staff have been amazing to work with and we have felt very supported. The therapeutic approach is always something we have used but the specific support for certain individuals has been brilliant.'*

### Proposed Cost of Delivery in 2024/25

The following table summarises the proposed cost of the service for 2024/25. It is based on employing the team members outlined above.

	2022/23 £	2023/24 £	2024/25 Proposed £	% increase
Staffing Costs	207,897	228,018	236,541	3.6%
Other Costs	6,870	6,890	6,890	
Support Service Recharges	21,477	23,491	24,343	
Total Cost	236,243	258,399	267,774	
Less Surplus Brought Forward	-12,385	0	-6,360	
<b>Amount to be De-Delegated</b>	<b>223,858</b>	<b>258,399</b>	<b>261,414</b>	<b>1.15%</b>

The overall cost of staffing has increased by 3.6%, but the overall cost has only increased by 1.15% as there was a balance carried forward from 22/23.

This does not take into account income which will be earned from any Academies which choose to buy back this service. Any additional income received from this source will reduce the net cost and the charge to maintained schools.

### Method of charging in 2024/25

The total net cost of the service will be divided by the total number of pupils recorded in the October 2023 census to arrive at a per pupil amount for charging purposes. Using October 2023 census data, this would equate to £18.21 per pupil. Appendix A of the main report shows the indicative total amount per school.

Other Options which *may* be considered

1. The local authority offer a fully traded service (likely to increase the cost to individual schools).
2. Schools “pay as you go” either by employing/using own staff when needed or purchasing support from external providers (may include the local authority if still able to offer this service).
3. Local authority to consider an alternative (cheaper) service to offer.

## West Berkshire Council Maintained Schools

### Proposal to De-Delegate Formula Funding 2024/25

#### Ethnic Minority & Traveller Achievement Service (EMTAS)

#### Context

EMTAS has been funded through a de-delegation process as agreed with the Heads Funding Group. All the support for ethnically diverse, English as an additional language (EAL) and Gypsy, Roma and Traveller (GRT) pupils is provided by the West Berkshire EMTAS Service.

#### Current Structure

In September 2020 EMTAS was restructured and moved to be part of the Education Welfare and Safeguarding Service (EWSS).

Currently, EMTAS is led by a Team Leader (0.6FTE), supported by an EAL Learning Adviser (1.0 FTE). There are 3 part time Pupil Support Officers (Teaching Assistant level posts) who are employed for a total of 2.0 FTE.

Until July 2023 this included a temporary post (0.4fte), funded by the Afghan fund to support the refugee children newly arriving in West Berkshire. The service has administrative support for 2 days per week since September 2021.

The Team Leader is responsible for the day-to-day management of the service.

- Organisation and completion of English language assessments of EAL pupils for whom language may be a barrier to learning, writing advisory reports with recommended strategies.
- Arranging advice and support for individual pupils, including those with EAL and possible SEND needs and those in the EHCP process.
- Providing translation to support schools and families of vulnerable pupils at professional's meetings linked to EHCPs.
- Leading training for teachers and teaching assistants about EAL and reducing barriers to learning.
- Organisation of tailored packages of support to schools to meet the needs of ethnically diverse pupils and those from Gypsy, Roma, Traveller families e.g. managing the GRaT 121 programme – training teaching assistants through targeted workshops to deliver intervention programmes to narrow the attainment gap with their peers and to reduce inequalities.
- Tracking the attainment of GRT pupils termly to inform interventions and the allocation of the GRT Pupil Support Officer.
- Multi-agency approach to support schools with EAL and GRT pupils.
- Support the Virtual School by providing EAL assessments for newly arrived unaccompanied asylum-seeking children (UASC) to aid transition to educational settings.
- Provide EAL and GRT advice, guidance, and resources to schools.

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

- Completion of EAL assessments for pupils who may be finding it difficult to access learning. Providing advisory assessment reports with recommendations and guidance for classroom teachers.

- Supporting the Team Leader delivering training at a corporate level for Heads, SLT, Inclusion Leads, SENCOs and teachers. Also, deliver in school workshops for support staff to understand the needs of EAL learners, share useful strategies and resources.

The Pupil Support Officers (PSO) work in schools supporting individual and small groups of pupils:

- At present bilingual support is available, if appropriate for Polish and Romanian pupils.
- Support is focused on helping vulnerable pupils to access the curriculum and improve English acquisition.
- PSOs may support schools with parent communication, in school meetings regarding SEND and the EHCP process to support vulnerable pupils.
- The Pupil Support Officer for GRT pupils has a wider brief involving extensive liaison between families, staff, and other professionals. May be allocated to deliver short-term weekly interventions in school, after a referral either due to concerns about academic progress or behaviour. GRT families are supported with attendance, admissions, transition, and engagement with learning.

## Benefits of Service

### EAL assessments

Referrals for EAL assessments were received from 30 West Berkshire Schools from the beginning of the September 2022 to August 2023 academic year: a total of 135 pupils. 50% of schools referred as part of transition to Year 1.

Birch Copse Primary	Pangbourne Primary
Brimpton CE Primary	Parson's Down infant & Junior Schools
Burghfield St Mary's CE Primary	Robert Sandilands Primary
Calcot Infant & Junior Schools	Shaw-cum-Donnington CE Primary
Curridge Primary	St John's CE Primary
Denefield Academy	St Joseph's Catholic Primary
Hermitage Primary	St Nicolas CE Junior School
Inkpen Primary	St Paul's Catholic Primary
John Rankin Infant & Junior Schools	St John's Pre-School
Kennet Valley Primary	Stockcross CE Primary
Kintbury St Mary's CE Primary	Thatcham Park CE Primary
Little Heath Secondary School	Theale CE Primary
Long Lane Primary	The Willows Primary
Mortimer St John's CE & St Mary's CE	Trinity Academy
Mrs Bland's Infant School	Westwood Farm Infant & Junior Schools

During the summer term of 2023, 55 referrals (in comparison to 55 in previous year) were made for EAL assessments for pupils moving from FS2 to Year 1.

Support schools have received is beyond bilingual support, EAL and first language assessments. EMTAS work co-productively with other professionals, such as Speech & Language, Educ. Psych, SEND, EHA, EWO; to support schools and families with the EHCP process.

**Bilingual support has been provided in the following schools in 2022/23:**

**EAL Adviser (Polish) – 9 pupils supported in 5 schools:**



Kintbury	Denefield
St John's	Little Heath
St Paul's	

**Pupil Support Officer (Portuguese/Italian/Spanish) – 8 pupils supported in 4 schools:**

Inkpen	St Joseph's
St Finian's	St Paul's

**Pupil Support Officer (Romanian) – 2 pupils supported in 2 schools:**

St John's	The Willows
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**Afghan Support Officer (Temporary/now ceased) - 15 pupils:**

Calcot	Kennet Valley
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**Summary:**

Support schools have received is beyond bilingual support, EAL and first language assessments. EMTAS work co-productively with other professionals, such as Speech & Language, Educ. Psychs, SEND, EHA, EWOs; to support schools and families with the EHCP process.

Top Languages		
Polish		16%
Hindi		11%
Russian		9%
Cantonese		8%
Telugu		7%
Ukrainian		5%

Total South Asian languages 32%

**In school TA Funding:**

In addition to bilingual support, EMTAS provided funding for Teaching Assistants within schools to support EAL learners in the early stages of English acquisition. EMTAS increased the hourly rate to £10.43 per hour in September 2018 to be more in line with current Teaching Assistant pay.

Number of TA funded hours given to schools:

2022/23
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1530 hours (EAL)
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90 hours (GRT)
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Total: £16,896.60
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An additional 500 hours of TA funding have been allocated and there has been a 50% increase in funded TA hours for GRT pupils since the previous academic year 2021/2022. The total allocation of funding rose from £11,212.25 in 2021/22 to £16,896.60.

**Schools in receipt of GReaT121 project funding during 2022/23** to provide targeted intervention for Gypsy, Roma and Traveller pupils.

Great121 - total £939
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### Training provided (Shaw House and individual schools)

Academic Year 2022/23
EMTAS delivered corporate training – ‘How to meet the needs of New Arrivals’ this year and will be increasing this to three, two hour sessions (one per term).
EAL training for TAs who are to deliver EAL interventions after an EAL assessment outcome.
Moving forward, additional EAL workshops allocated as well as TA intervention will provide a further increased tailored support for schools.

### Number of families supported by Pupil Support Officer (GRT)

West Berkshire has 115 children who are ascribed as Gypsy, Roma or Traveller.

33 West Berkshire schools have Gypsy, Roma and Traveller pupils on roll.

22 GRT children have been supported in 20 schools (an increase of 50%) seeking guidance and support by the PSO GRT. Transition support has been provided between schools and also when pupils have been transferring from out of West Berkshire into our schools. This work involves ‘in year’ changes as well as end of Key Stage transitions.

EMTAS Pupil Support Officer for GRT pupils has supported children and families from GRT backgrounds during 2022/23. This included face to face sessions and a range of home/school visits, as well as consultations with SLT at schools with a high proportion of GRT pupils.

The following schools have received support from EMTAS for Gypsy, Roma and Traveller pupils.

Aldermaston	Mortimer
Brimpton	Mrs Bland's
Burghfield St Mary's	Purley
Calcot	Robert Sandilands
Castle	SUN
Engaging Potential	Thatcham Park
Garlands	The Downs
Hermitage	Theale Green
i-college	Westwood Farm

Kennet	Willink
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Schools have been supported with engagement with their GRT families in multiple areas e.g. the EHCP process, issues around safeguarding, behaviour, avoiding exclusion, intervention for gaps in learning, transition, delivery of culturally sensitive topics (Sex Education), transport, admissions, attendance, housing and Elective Home Education.

### GRT Outreach:

Over the previous years, EMTAS has delivered engagement sessions for pre-school children via the hire of the Bus Of Hope facility. This included sessions 9/12 months of the year at Paices Hill traveller site based in Aldermaston. Unfortunately, due to governance issues at the BOH and mechanical ones of the bus; this has led to the end of this collaborative project. A positive outcome has been the emergence of new co-production with an NHS Health Bus helping to reduce inequities in the WB community.

### Afghan refugees

Initially EMTAS supported the newly arrived Afghan refugee children daily by delivering educational activities in the Calcot hotel. Following the children's admission to schools, an EMTAS Pupil Support Officer (0.4 FTE) has been employed to temporarily support their transition, funded by the Afghan budget, after EAL assessments.

### Ukrainian families

Since the Ukrainian families arrived in West Berkshire, their transition has been supported with EAL assessments and guidance reports. Also, by delivering training to staff to understand their wider needs.

## Proposed Cost of Delivery in 2024/25

The following table summarises the proposed cost of the service for 2024/25 in comparison with previous years.

	2022/23 £	2023/24 £	2024/25 Proposed £	% increase
Staffing Costs	177,120	169,080	178,080	
Other Costs	26,020	17,020	17,020	
Support Service Recharges	20,314	18,610	19,510	
Total Cost	223,454	204,710	214,610	4.61%
Less Surplus Brought Forward	-54,590	-17,692	-28,440	
<b>Amount to be De-Delegated</b>	<b>168,864</b>	<b>187,018</b>	<b>186,170</b>	<b>-0.5%</b>

Although the cost of staffing has increased, the overall cost of delivering the service has decreased by 0.5% as there was an underspend of £28k from 2022/23.

### Method of charging in 2024/25

The total cost of the service will be divided by the total number of pupils recorded as having English as an additional language (for up to 3 years after they enter the statutory school system) in the October 2023 census to arrive at a per pupil amount for charging purposes. Based on October 2022 census data, this equates to £212.64 per pupil. Appendix A of the main report shows the total amount per school.

### Other Options which may be considered

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

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

**West Berkshire Council Maintained Schools****Proposal to De-Delegate Formula Funding 2024-25****Trade Union Representation Service****Outline of Proposed Service 2024/25**

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).

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 to staff (note: NASUWT and ATL also represent non teaching staff; NEU only represents teachers); disciplinary issues; grievances; ill health cases; capability cases; and settlement agreements

**What union officers do**

Union officers use 'facilities time' to work with members experiencing professional difficulties (casework) and to support groups of members either in individual schools or through negotiation and consultation with the local authority acting on behalf of its schools (collective work). The casework dealt with by union officers falls into two broad categories: individual issues and collective issues.

Individual casework issues

The union officers spend most of the facilities time dealing with members. Union members in West Berkshire schools are able to contact their union representative directly by email or telephone. Issues raised by members in this way are known as casework. Casework can be divided into capability; disciplinary; grievance; and contracts, pay and conditions

Advice is often given on how the teacher/support staff can seek to resolve the matter for themselves. However, there are a number of cases where the union officer has to make contact with school management, human resources providers or an LA officer directly. Employees are entitled to be accompanied by a union officer at formal meetings under school HR procedures.

Contracts, Pay and Conditions issues such as pay determination appeals and questions of what teachers can be directed to do are becoming increasingly common.

**Collective Issues**

These include consultation on changes to working conditions such as pay policies, sickness absence policies, codes of conduct restructuring and redundancy.

This school year has seen an increase in the number of school restructurings accompanied by the risk of redundancy, as school budgets come under increasing pressure. The redundancy procedure is complex and often involves multiple meetings. The

threat of redundancy can quickly undermine morale in a school and often the role of union officers is to reassure and support employees as well as ensuring that correct procedures are followed.

## Proposed Cost of Delivery in 2024/25

The following table summarises the proposed cost of the service for 2024/25, compared to 2023/24. It is based on engaging a representative from each of the unions:

	2023/24 £	Proposed UPS3 2024/25 £
<b>Total Direct Costs</b>	<b>£59,839</b>	<b>£64,036</b>
Support Service Recharges	£5,984	£6,404
<b>Total Cost</b>	<b>£65,823</b>	<b>£70,440</b>
Income from Nursery and Special Schools and PRUs	£2,003	£2,149
<b>Cost to Primary and Secondary Schools</b>	<b>£63,820</b>	<b>£68,291</b>

The proposed budget for 2024/25 is based on:

- Reimbursement to schools providing release time (not the salary of the union representative for trade union activities) is dependent on agreement by Schools Forum in respect of maintained primary and secondary schools and from other schools which elect to buy in the facilities time – the budget is calculated as approximately equivalent to 1fte teacher paid on UPS3 across all unions;
- Each trade union to have five days for regular activities including attendance at local authority consultative meetings;
- Balance of budget available is divided proportionately by the number of current members in each union as at 1<sup>st</sup> June (the budget will be adjusted depending on the actual level of buy back from other schools).

Note that representatives work across all sectors, and it is irrelevant what type of school they are employed by. Therefore the total net cost is divided between all schools de-delegating rather than taking each sector separately.

## Method of charging in 2024/25

The total cost of the service will be divided by the total number of pupils recorded in the October 2023 census to arrive at a per pupil amount for charging purposes. Using October 2023 census data, this would equate to £4.74 per primary and secondary pupil. Appendix A of the main report shows the indicative total amount per school. Academies and other schools may choose to buy into the service at the same per pupil rate (this would provide funding for additional hours).

## Other Options which *may* be considered

It should be noted that once a decision has been made to discontinue pooling arrangements, it would be almost impossible to reverse that decision at a later date.

Therefore the HFG and SF need to be aware that a decision to cease pooling arrangements for this budget would be permanent.

There may be the option to consider a reduced service at a lower cost to schools.

## West Berkshire Council Maintained Schools Proposal to De-Delegate Formula Funding 2024-25 CLEAPSS Service

### Outline of Proposed Service 2024/25

West Berkshire Council has an agreement with CLEAPSS (Consortium of Local Education Authorities for the Provision of Science Services) which includes the provision of support and advice to teachers, technicians, head teachers and governors/trustees on how best to use high quality practical work to support pupils learning in science, design & technology and, most recently, art & design.

All but two of the 182 authorities, with the duty to provide education, in England, Wales and Northern Ireland and the various islands, are members of CLEAPSS.

The Local Authority can offer schools and academies the opportunity to purchase an annual CLEAPSS subscription at a heavily discounted price from that which schools would pay to CLEAPSS independent of West Berkshire Council.

The CLEAPSS service also requires the provision of a Radiation Protection Officer (RPO) and the Radiation Protection Adviser (RPA) for secondary schools and academies who will require some radiation sources on site as part of the national curriculum.

### Benefits of Service

CLEAPSS covers:

- Health & safety including model risk assessments
- Chemicals, living organisms, equipment
- Sources of resources
- Laboratory design, facilities and fittings
- Technicians and their jobs
- D&T facilities and fittings

CLEAPSS provides:

- Termly newsletters for primary and secondary schools
- A wide range of free publications
- Model and special risk assessments
- Low-cost training courses for technicians, teachers and local authority officers
- A telephone helpline
- A monitoring service, e.g. for mercury spills
- Evaluations of equipment
- Advice on repairs
- A H&S / Review of service publishers, exam boards and other organizations producing teaching resources

The local authority will have met the conditions of membership if all community schools subscribe.



## Costs and Method of charging for 2024/25

CLEAPSS set the pricing each year in January/February for the financial year April to March ahead. In 2023/24 the charge to schools was 17 pence per pupil including administration costs. For secondary schools who require the service of a Radiation Protection Officer (delivered by WBC Health & Safety Team) and a Radiation Protection Adviser (delivered by CLEAPSS) there are additional costs of £185 per annum for the Radiation Protection Officer and £50 per annum for the Radiation Protection Adviser totalling £235 for the RPA and RPO services.

The proposal for 2024/25 is to increase the rate per pupil to 19 pence per pupil to account for rises from CLEAPSS. As the de-delegation covers pre-16 pupils only, maintained secondary schools will need to pay the 6<sup>th</sup> form element of the fee as a separate sum.

The charges for the RPA and RPO service will be increased by £15 to cover the increase cost from CLEAPSS to £250 total.

Independent, Academies, Foundation and VA schools may purchase the CLEAPSS subscription directly through CLEAPSS.

The cost per pupil/school is shown in the table below in comparison with the cost of buying this service directly from CLEAPSS, the RPA/RPO service is not available directly from CLEAPSS.

School	Cost through local authority per pupil	Cost directly per pupil (min 200 pupils/ 350 secondary)	Radiation Protection Advisor	Radiation Protection Officer
Nursery	19p	32.5p	N/A	N/A
Primary	19p	32.5p	N/A	N/A
Secondary	19p	32.5p	£60	£190
Special	19p	32.5p	N/A	N/A
PRU	19p	32.5p	N/A	N/A
Primary Academy	19p	32.5p	N/A	N/A
Secondary Academy	19p	32.5p	£60	£190
Incorporated colleges	19p	32.5p	£60	£190

**West Berkshire Council Maintained Schools**  
**Proposal to De-Delegate Formula Funding 2024-25**  
**School Improvement Team**

## Outline of Proposed Service 2024/25

### 1. Statutory Functions

#### 1.1 From section 13A of Education Act 1996:

“Duty to promote high standards and the fulfilment of potential”

When delivering school improvement functions, LAs must also have regard to the Schools Causing Concern statutory guidance. The guidance covers “Schools Causing Concern” but also other maintained schools which the LA has serious concerns about and needs to be addressed.

To fulfil these requirements, the LA is required to have the expenditure to:

- Monitor all maintained schools (visit to schools at risk, data monitoring; categorisation of support)
- Have the resources to be able to take action where necessary to support the improvement of standards in particular, This includes issuing Warning Notices where there are concerns about standards, leadership, governance , finance or the safety of pupils.

#### 1.2 Monitoring National Curriculum Assessment Arrangements

Expenditure on monitoring NC assessment arrangements required by orders made under section 87 of the 2002 Education Act.

Under the Education (NC) (KS1 Assessment Arrangements) Order 2004, a local authority must:

- Appoint a person who has recent experience of provision of the NC in primary schools.
- LAs have equivalent duties in KS2

(Currently costed at £25k per annum)

#### 1.3 Religious Education

A local authority must:

- Set up a standing advisory council on religious education (section 390 Education Act 1996); and

- Prepare an agreed syllabus of religious education in accordance with Schedule 31, Education Act 1996. (currently costed at £4K per annum)

## 2. Other services provided free of charge

2.1 The School Improvement Team is currently funded by DSG and also the traded side of the service. There is however a significant part of the service that is provided free for all maintained schools, regardless of whether they buy into the Traded service or not.

This includes:

1. An annual **Footprint visit** – that not only bring the successes of the school together, shares updates and current links for statutory procedures but also ensures that we are able to plan bespoke training or training that multiple schools are asking for. The information gives us an accurate picture and helps put schools in touch with each other, where particularly strong practice is happening.
2. **Ofsted** support – 24/7 support from an experienced adviser from the first phone call from Ofsted to the feedback at the end of the inspection. Support for staff as and when needed and rapid support when issues need to be closed down, school end. From January 2023 we have been attending during the actual inspection if the HT has requested it. This is due to the heightened emotions and tensions surrounding the Ruth Perry tragedy and the increased stresses that an inspection creates for the school and its leaders. Issues can be raised during the inspection with the support of the School Improvement team.
3. **Safeguarding audits** – Initially conducted for all schools in the immediate window for an Ofsted Inspection. The school Improvement team would like these audits going forwards, to be more regular. These are conducted with the person responsible for the SCR and DSLs/DDSLs. SCR/responsibilities/Governor involvement. Areas include;
  - a. A visual check of the SCR, picking up any issues (if any)
  - b. Overseas checks, identity checks, Section 128 etc
  - c. Staff and governor Training and how that is recorded, DSL compliance.
  - d. KCSIE/safeguarding updates
  - e. Early help procedures
  - f. Safer recruitment training
  - g. Staff personnel files
  - h. Record keeping/system used for safeguarding
  - i. Part time timetables/CME/AP provision and checks made on the providers
  - j. Filtering and monitoring
  - k. Site security
  - l. PREVENT training
  - m. SRE
4. Supporting schools when they are making **formal complaints to Ofsted**. Meeting with the HT/Governors and compiling and producing reports to support the complaints procedure.
5. Support for schools producing evidence to the DFE for **Revocations of Academy** orders.

6. **Ofsted Meetings** – attending regular meetings with HMI and the regional director to support our schools during Inspection and ensure that issues and concerns are raised promptly and that action is taken. E.g certain inspectors were not operating within the guidelines for their Code of Conduct. These inspectors were not scheduled again within the authority.
7. **Weekly KIT emails** – to ensure that links and resources are sent in a timely manner, so that Head Teachers have current DFE and Ofsted updates and are not missing deadlines for statutory compliance.
8. **Well being support for school leaders.** Visits and signposting to ensure Leaders are supported through a whole host of issues that might be affecting them.
9. **Primary Heads Forum** – Focused presentations that share information to upskill and support Head teachers 5x across the year.
10. **Head teacher recruitment** – a School Improvement Adviser to support, sit on the Headteacher Appointment Panel, advise the panel on the process of recruitment, support with panel questions and presentations and both the adviser and Director Of Education attends the final panel.
11. **Documentation** – Any documents we produce are sent out to all schools e.g
  - (i) Templates for Deep Dives
  - (ii) Questions for middle leaders
  - (iii) Expertise knowledge and signposting in any area
  - (iv) School Led Tutoring “End of Year Statement” deadline, to ensure that school’s do not get their financial allocation taken back by the DFE.
12. Website checks on all schools in the ofsted window, against the DFE’s criteria, to support schools to ensure that they are compliant with the updated requirements.
13. **Re categorisation** –
  - a. **Outcome 3 for Section 8 Inspections** – up to 3 days further support for maintained schools that are a cause for concern.
  - b. **Support of Outcome 4 schools** – at least 3+ days of intensive support.
  - c. **Schools that have to operate a MOU** to ensure that they have a HT are supported by an experienced School Improvement Adviser.
14. **Email queries** from all school staff and leaders about all areas of school improvement.
15. **Support for schools receiving Ofsted complaints** – supporting Chairs of Governors through the complaints procedure, meeting with HTs and offering bespoke support as needed.
16. **Pupil Premium Grant/Diminishing the Difference** support for every school.

- a. Pupil Premium Grant queries – eg contacting the DFE on schools behalf.
- b. Support for schools reviewing and setting new targets within the DFE deadline of December 2023.
17. **Subsidised courses** wherever possible.
18. **New to Headship** – 3 days of free support from an experienced School Improvement Adviser and a mentor provided by the LA.
19. **The Key documents** - due to a new relationship with The Key in 2021/2022, documents are send out, saving schools the cost.
20. **Phonics Scheme** – Now a DFE validated scheme offering a reduced price to all West Berkshire Schools in the first year.
21. **Free Safeguarding Governor network** – to support this vital area within the responsibilities of the Governing Body.

### 3. Proposed Cost of Delivery in 2024/205

3.1 The School Improvement service has been funded by a grant since 2017.

3.2 In October 2021, the DFE consulted on the future funding of the service with the proposal to:

- (i) Phase out the current grant funding by the start of 2023/24
- (ii) Reduce the grant in 2022/23 to 50% of the current amount on a per school basis
- (iii) The remaining 50% funding to be de-delegated to schools in 2022/23

3.3 For the 2023/24 year & beyond the service will be wholly funded by de-delegation

3.4 The following table summarises the proposed cost of the service for 2024/25.

	2022/23 £	2023/24 £	2024/25 Proposed £	% increase
Staffing Costs	289,356	292,681	303,250	
Other Costs	11,860	15,480	15,480	
Support Service Recharges	30,122	30,816	31,873	
<b>Total Cost</b>	<b>331,338</b>	<b>338,977</b>	<b>350,603</b>	<b>3.32%</b>
Forecast grant funding	-135,769	0	0	
De-delegation underspend from 2017/18	-41,000	0	0	
Less Surplus Carried Forward		-130,000	-59,220	
<b>Amount to be De-Delegated</b>	<b>154,569</b>	<b>208,977</b>	<b>291,383</b>	<b>28.3%</b>

The overall cost of delivering the service has increased compared to 2022/23 as the carried forward value from the prior year is much lower. The £130,000 in 2023/24 was an estimate of the underspend from the DFE grant. The total underspend for 2023/24 was £189,220, of which £130,000 was already allocated, leaving £59,220 to carry into 2024/25.

This does not take into account income which will be earned from any Academies which choose to buy back this service. Any additional income received from this source will reduce the net cost and the charge to maintained schools.

### Method of charging in 2024/25

The total net cost of the service will be divided by the total number of pupils recorded in the October 2023 census to arrive at a per pupil amount for charging purposes. Using October 2023 census data, this would equate to £20.29 per pupil. Appendix A of the main report shows the indicative total amount per school.

Other Options which *may* be considered

1. The local authority offer a fully traded service (likely to increase the cost to individual schools).
2. Schools “pay as you go” either by employing/using own staff when needed or purchasing support from external providers (may include the local authority if still able to offer this service).
3. Local authority to consider an alternative (cheaper) service to offer.

## West Berkshire Council Maintained Schools

### Proposal to De-Delegate Formula Funding 2024-25

#### Statutory and Regulatory Duties - Accountancy, Audit and Pension Scheme Administration

Accountancy (Statutory Functions)
<p><b>Description of Duties:</b>            Consolidation of school accounts into Council's year end statement of accounts.            Overview of school budget submissions &amp; budget monitoring reports.            Monitoring of schools in financial difficulty/deficit.            Monitoring adherence to Scheme for Financing Schools.            Returns to Central Government – CFR, CFO grants return.            Administration of grants &amp; other funding to maintained schools eg. PPG, budget allocations &amp; adjustments.            Budgeting and accounting functions relating to maintained schools (Sch 2, 74)</p>
Cost: £54,607
0.36 FTE Accountants; 0.34 FTE Senior Accountant; 0.05 Schools Accountancy Manager; 0.12 FTE Finance Manager <b>Total FTE 0.87</b>
Pension Scheme Administration
<p><b>Description of Duties:</b>            Administration of Teachers and Local Government pension schemes in relation to staff working in maintained schools:            Amending and updating employee records in relation to pensions            Responding to queries from employees in relation to pensions            Completion of statutory monthly returns to Teachers Pensions and Local Government pension scheme, including service and pay calculations.</p>
Cost: £38,797
1.0 FTE Pensions Assistant

## Internal Audit of Schools – Statutory Requirements

### Description of Duties:

Annual internal audit of maintained schools according to level of risk - circa 10 schools are audited per year. Each audit takes on average 7 days. The audit covers Governance; financial planning and management; financial policy, processes and records; benchmarking and value for money; school fund, SFVS.

We also carry out follow-up reviews for those schools that have a weak or very weak audit report opinion.

There is provision for adhoc advice to schools/issuing the Anti Fraud Advisory Bulletins and the investigation of any financial irregularities. We also monitor compliance with submitting the SFVS returns.

We have also included an element of time for the planning and monitoring of the school visit programme, and liaising with Accountancy /governor support etc on queries when they arise.

Cost: £52,781

0.65 FTE Senior Auditor; 0.09 FTE Audit Manager

## Proposed Cost of Delivery in 2024/25

The following table summarises the proposed cost of the service for 2024/25, compared to 2023/24.

	2022/23 £	2023/24 £	2024/25 Proposed £
Accountancy	51,756	52,626	54,607
Audit	50,075	52,911	52,781
Pension Scheme Admin	36,025	35,864	38,797
<b>Total Cost</b>	<b>137,856</b>	<b>141,401</b>	<b>146,185</b>
Less income from Special and Nursery Schools and PRUs	4,194	4,302	4,460
<b>Amount to be De-Delegated</b>	<b>133,662</b>	<b>£137,099</b>	<b>£141,725</b>

## Method of charging in 2024/25

The total net cost of the service will be divided by the total number of pupils recorded in the October 2023 census to arrive at a per pupil amount for charging purposes. Using October 2023 census data, this would equate to £9.84 per pupil. Appendix A of the main report shows the indicative total amount per school.

Other Options which *may* be considered

1. The local authority offer a fully traded service (likely to increase the cost to individual schools).
2. Schools “pay as you go” either by employing/using own staff when needed or purchasing support from external providers (may include the local authority if still able to offer this service).

Local authority to consider an alternative (cheaper) service to offer.



## West Berkshire Council Maintained Schools

### Proposal to De-Delegate Formula Funding 2023-24

#### Statutory and Regulatory Duties – Health and Safety

#### 1. Introduction

- 1.1 The Council has an established, professional and well regarded Health and Safety Team that already supports West Berkshire schools.

#### 2. Background and Legislative Context

- 2.1 The principal legislation in the United Kingdom for health and safety is the Health and Safety at Work etc. Act 1974. There is also a considerable amount of health and safety legislation under the Health and Safety at Work Etc Act 1974 including the Management of Health and Safety at Work Regulations etc.
- 2.2 The Management of Health and Safety at Work Regulations set out that every employer shall appoint one or more competent persons to assist him in undertaking the measures s/he needs to take to comply with the requirements imposed by the relevant statutory provisions.
- 2.3 The regulations state that the employer shall ensure that the number of competent persons appointed, the time available for them to fulfil their functions and the means at their disposal are adequate having regard to the size of the undertaking, the risks to which employees are exposed and the distribution of those risks throughout the organisation. It should be noted that the regulations do not suggest any limit or scope to the competent advice or how it should be delivered practically.
- 2.4 The regulations also state that where there is a competent person in the employer's employment, that person shall be appointed in preference to a competent person not in his employment.
- 2.5 The duties imposed by the health and safety at work Act 1974 and associated regulations apply to the Council as an employer and it would also apply to the Council in relation to Local Authority maintained schools as the Council is the employer.
- 2.6 In the case of Foundation and Voluntary Aided schools the Governors are the employer. In independent schools and Academies the Governors or the Academy Trust are the employers.
- 2.7 The Council also has the general "duty to educate", even where the Governors or an Academy Trust are the employer, there could be some limited involvement for the Council if a serious incident were to occur. See Appendix B for further information on the legal duty holders.

### 3. The Councils Health & Safety Support Service to Schools

- 3.1 The Council offers a health and safety support services to West Berkshire schools in line with the service level agreement offered to all schools included in the dedelegation system.
- 3.2 Following a decision to change the way the service operated in 2020/2021 since then all maintained schools have had the Level Two (Enhanced) service. This is a comprehensive health and safety support service and covers all aspects of health and safety management and support including necessary health and safety training.
- 3.3 The Health and Safety Team provide a compliance, advice and training role for schools and the Team continue to be heavily involved in assisting schools developing and reviewing covid secure arrangements, plans and risk assessments.
- 3.4 As the Council is the employer and therefore the principal legal duty holder (not withstanding any delegated responsibilities to a schools, Head Teachers and Governors) in relation to health and safety, it makes sense to ensure an adequate, effective and efficient health and safety service is provided to Local Authority maintained schools and then a buy-back option offered to non-maintained schools.

### 4. Update on position since last year

- 4.1 An options paper setting out a number of alternative ways that the schools health and safety service could be funded into the future was taken to the Schools Funding Forum in 2020/21. There were options to move to a uniform service level to all maintained schools funded by all maintained schools paying an equal share or to remain with the part funded and part buy-back service. Head Teachers voted to change to a system where all schools paid for the enhanced Level 2 buy-back service.

### 5. Proposals

- 5.1 The full schools health and safety service would be provided to all maintained schools, continuing on from the previous year. This will meet the requirements of the employer under the Health and Safety at Work etc. Act 1974 and the Management of Health and Safety at Work Regulations and other related legislation.
- 5.2 Schools will pay a graduated fee based on pupil numbers for the Level 1 element of the service and a top up cost to cover the combined service. All maintained schools will need to agree to be part of this collective agreement to equitably fund the service.
- 5.3 A buy-back option would continue to be offered to schools such as academy and independent schools. Income generated from buy-back services would be invested in the service or offset to reduce costs for the schools in the collective agreement.
- 5.4 Table 1 below shows the 24/24 cost if all Local Authority maintained schools, Voluntary Controlled, Voluntary Aided and special schools agree to one equal service. Due to rising costs it is unfortunately necessary to increase the cost of the service by 6%

**Table 1**

Pupil No's	Band A 0-60	Band B 61 - 100	Band C 101-200	Band D 201-300	Band E 301-459	Band F 460+	Band G Secondary
21/22	£800.00	£1,300.00	£1,600.00	£2,000.00	£2,600.00	£4.47 Per pupil	£4.47 Per pupil
22/23	£800.00	£1,300.00	£1,600.00	£2,000.00	£2,600.00	£4.57 Per pupil	£4.57 Per pupil
23/24	£832.00	£1,352.00	£1,664.00	£2,080.00	£2,704.00	£5.89 Per Pupil	£5.89 Per Pupil
24/25	£881.92	£1,433.12	£1,763.84	£2,204.80	£2,866.24	£6.24 Per Pupil	£6.24 Per Pupil

There are no discounts based on federated schools. However, schools with infants and juniors on the same site would pay one fee based on a combined pupil total up to 485 pupil when it will be charged per pupil. Maintained nursery schools would pay Band A due to the part time nature of their pupils.

5.5 Table 2 below shows the cost of providing the enhanced service:

<b>Table 2</b>	<b>2023/24 Proposed £</b>
Staffing Costs	121,380
Other Costs	8,200
Support Service Recharges	12,960
Total Cost	142,540
De-delegated basic level one income @ £6.24 per pupil	-91,809
Remainder cost to be met by all Maintained Primary and Secondary Schools via a top up for enhanced Health & Safety package	<b>50,731</b>

## 6. Recommendation

6.1 Schools consider the option set out above to maintain the current level of service. If this is not acceptable schools should identify what system they would prefer and the financial implication can be calculated.

## 7. Conclusion

7.1 The Council recognises that safety is important but needs to be approached creatively and should not be seen as simply another legal burden or bureaucratic chore. A planned approach to managing risk should be seen as an enabler, not just to prevent accidents and work related health problems for both staff and pupils but to build a culture of sensible risk management, linked to a curriculum where teaching young people can develop their capability to assess and manage risk.

7.2 The Council will continue to support sensible and pro-active health and safety management in schools by providing a supportive infrastructure and service to schools.

## West Berkshire Council Maintained Schools

### Health and Safety Service 2024/25

#### Overview of Service

West Berkshire Council has a professional and dedicated Schools Health and Safety Team who provide support and advice to schools on all aspects of health and safety including an online safety management system incorporating accident reporting, compliance management and a resource library.

The Schools Health and Safety Team also work on policy development and effective implementation, user friendly guidance and information, support in completing risk assessments, a complete range of health and safety training, safety alerts and health and safety newsletters.

#### Schools Health & Safety Needs Assessment

Schools Health & Safety Needs Assessment are designed to measure levels of compliance with legislation and best practice. The associated action plan will help you prioritise your improvements.

The assessment is conducted using a process of objective evidence gathering including a review of safety documentation, discussions with relevant managers and staff and a tour/inspection of the site.

We have operated the current system of needs assessments for four years now and have seen schools develop their health and safety management system but continued improvement is still required.

In order to free resource time that could be better utilised helping schools improve on the areas identified in the needs assessments, we propose to continue with the needs assessments with an amended schedule and to develop topic based assessments that will enable greater depth and time to be devoted to specific topics.

We propose that we would move the needs assessment process onto re-inspection frequencies similar to Ofsted.

Schools achieving a score of 91% and above on the previous needs assessment will require a new needs assessment completed in up to 5 years. Support will be provided in intervening years on the areas identified for improvement and topic specific assessments will be completed, where required.

Schools achieving a score of 80% to 90% on the previous needs assessment will require a new needs assessment completed in up to 4 years. Support will be provided in intervening years on the areas identified for improvement and topic specific assessments will be completed, where required.

Schools achieving a score of 60% to 79% on the previous needs assessment will require a new needs assessment completed in up to 3 years. Support will be provided in intervening years on the areas identified for improvement and topic specific assessments will be completed, where required.

Schools achieving a score of 59% and below on the previous needs assessment will require a new needs assessment completed in up to 1 year. Support will be provided in intervening years on the areas identified for improvement and topic specific assessments will be completed, where required.

Schools will be able to request a new needs assessment at any time, which will be booked at the earliest mutually convenient opportunity at no additional cost to the school.

There are 20 questions in the Schools Needs Assessment, each carrying a maximum of 4 marks giving a total maximum possible score of 80. Any question marked not applicable will reduce the total maximum score possible accordingly. Terminology has been taken from Ofsted, which should make it more familiar to schools and the scoring system has been influenced by British Safety Council and RoSPA health and safety audit systems. The frequency of needs assessments discussed above has been included in Table 1 below.

**Table 1**

Benchmark	Overall Score	Description	Score Range Achieved	Frequency between needs assessments
Outstanding	91%+	Schools judged as 'outstanding' on the previous needs assessment will require a new needs assessment completed in up to 5 years. Support will be provided in intervening years on the areas identified for improvement and topic specific assessments will be completed for all maintained schools and those schools purchasing the service.	91% and above	Up to 5 years
Good	80% to 90%	Schools judged as 'good' on the previous needs assessment will require a new needs assessment completed in up to 4 years. Support will be provided in intervening years on the areas identified for improvement and topic specific assessments will be completed for all maintained schools and those schools purchasing the service.	80% to 90%	Up to 4 years
Requires Improvement	55% to 79%	Schools judged as 'requires improvement' on the previous needs assessment will require a new needs assessment completed in up to 2 years. Support will be provided in intervening year on the areas identified for improvement and topic specific assessments will be completed for all maintained schools and those schools purchasing the service.	60% to 79%	Up to 3 years
Inadequate	Up to 54%	Schools judged as 'inadequate' on the previous needs assessment will require a new needs assessment completed in up to 1 year. Support will be provided in intervening months on the areas identified for improvement and topic specific assessments will be completed for all maintained schools and those schools purchasing the service.	59% and below	Up to 1 year

**West Berkshire Council Health and Safety****Table 2**

<b>Health and Safety Enhanced Service</b>
<p><b>Summary</b></p> <p>The aim of this service is to provide schools with a named, dedicated and professional Health and Safety Adviser to provide 'on-site support and advice' to the school, guiding and prioritising the integration of an effective and efficient safety management system and documentation in support of the School's Health and Safety Policy.</p> <p>The schools dedicated Health and Safety Adviser will begin by arranging and completing a Health and Safety Audit (Needs Assessment) of the school that will help to identify the strengths and areas for</p>

improvement in the schools existing arrangements. The Schools dedicated Health and Safety Adviser will then continue to work closely with the school to help plan, develop and implement your health and safety policy and the areas for improvement you need.

The Management of Health and Safety at Work Regulations require you to appoint someone competent to help you meet your health and safety duties. A competent person is someone with the necessary skills, knowledge and experience to manage health and safety.

West Berkshire Council, Schools Health and Safety Team will be your competent person and help ensure you meet your health and safety duties. Details of the Health and Safety service are listed below in further detail.

Service Provided	Service Standard
1) Advice	Advice and support will be provided to the school on specific questions/issues. If required the schools dedicated Health and Safety Adviser will arrange to visit the school and meet with relevant persons to ensure the enquiry is resolved.
2) Health and Safety Needs Assessment	<p>Schools will receive a health and safety needs assessment designed to assess and measure levels of compliance with health and safety legislation and best practice. The associated action plan will help you prioritise your improvement plan.</p> <p>Your dedicated Health and Safety Adviser will then arrange to assist and support the school in progressing the recommendations to ensure continual improvement.</p> <p>Health and Safety Needs Assessments will be completed for all maintained schools and those schools purchasing the service on a cycle subject to the outcome of the previous needs assessment as per Table 1 above.</p> <p>Schools will be able to request a new needs assessment at any time, which will be booked at the earliest mutually convenient opportunity at no additional cost to the school.</p>
3) School Safety Policy:	<p>Review existing against a model H&amp;S Policy that is school specific, in line with the LA Safety Policy, and conforms to appropriate local and legislative requirements.</p> <p>Ensure the Policy identifies key commitments with current signature.</p> <p>Ensure that the Policy, Organisation and arrangements are carried out and accurately reflect practice.</p>
4) Safety Organisation:	Review and provide documentation that identifies how health and safety is/shall become 'embedded' in daily operations at the school. Identify and/or nominate key staff tasked with health and safety responsibilities.
5) Planning and implementing:	<p>Review the existing arrangements; ensure the school adequately documents the standards and procedures required for a safe place of work.</p> <p>Following written review and prioritisation of issues, help the school to progress the areas for improvement by providing support and guidance. Improvement will be achieved with the schools full commitment and involvement.</p>
6) Health and Safety Risk Assessment:	<p>Provide the school with initial or refresher training to nominated persons regarding completion of <i>local</i> Risk Assessments.</p> <p>Provide on-site review of the schools risk assessments, to support their completion.</p>

	<p>Provide basic refresher training to nominated groups of key staff. Ensure a practical understanding of the training by jointly completing several specific health and safety risk assessments required by the school.</p> <p>Provide support and guidance in terms of prioritising risk assessments to be completed or reviewed etc.</p>
<b>7) Telephone/Incident response:</b>	<p>Provide general telephone health and safety advice as required.</p> <p>Please note that where the topic is of a specific nature, additional time may be required for a detailed response following the initial call.</p> <p>Whilst every endeavour is made to provide an immediate answer to health and safety queries via telephone/email, requests may require additional research time. Therefore, where it is not possible to provide an answer of sufficient depth at the time of the call, or the same day, every endeavour shall be made to provide a follow-up call the next working day.</p> <p>Should the associated risk to safety or health warrant a school visit, this shall be arranged by the Health and Safety Team.</p>
<b>8) Health and Safety Training</b>	<p>The Health and Safety Team run school specific health and safety courses. All health and safety training is included for all maintained schools and those schools purchasing the service.</p> <p>Further details of courses available and costs can be obtained from CYP Training  <a href="http://info.westberks.gov.uk/index.aspx?articleid=29858">http://info.westberks.gov.uk/index.aspx?articleid=29858</a>.</p> <p>On-site training can also be arranged at no additional cost. Much of the training offer can now be completed by attending virtual training sessions vis zoom/teams meaning costs in terms of staff availability and downtime for training are reduced.</p> <p>Pre-recorded whole school training sessions are available for some subjects free of charge to all maintained schools and those purchasing the service</p>
<b>9) Fire Management</b>	<p>Schools can request a regular site visit to complete a review of the schools Fire Risk Assessment (FRA) with their Health and Safety Advisor.</p> <p>Your advisor can also:          Complete a site inspection to verify recommendations have been implemented.          Discuss any issues outstanding and how to address these.          Your advisor will help schools to complete an assessment to ensure you have adequate numbers of appropriately trained staff to deal with fire safety issues.</p> <p>Your advisor can also provide Fire Awareness training to school staff at an agreed time and date on site.</p>
<b>10) Asbestos Management</b>	<p>Schools can request a regular site visit to complete a condition check of ACM (asbestos containing materials) with their Health and Safety Advisor.</p> <p>Your advisor can also review:          The Asbestos Management Plan          The Asbestos Register          The Asbestos Survey</p> <p>Additionally any asbestos related risk assessment you may have in place will be reviewed to ensure it is correct and relevant.</p>

	Your advisor can also provide tool box talks to your staff to allay any fears they may have regarding retained ACMs and also to highlight their responsibilities in respect of Health and Safety regarding asbestos.
<b>11) Legionella Management</b>	<p>Schools can request a regular site visit to complete a review of the legionella risk assessment with their Health and Safety Advisor.</p> <p>The advisor will also check that the school are working within the written scheme suggested and in line with the recommendations of the risk assessment.</p>
<b>12) Playground Equipment</b>	Schools can request a regular site visit to complete a playground equipment inspection with their Health and Safety Advisor. This will be a guided check to ensure staff are confident with what should be checked, what should be recorded and what action to take.



## West Berkshire Council Maintained Schools

### Legal Duty Holders for Health and Safety

England and Wales	
School type	Employer
Community schools	The local authority
Community special schools	
Voluntary controlled schools	
Maintained nursery schools	
Pupil referral units	
Foundation schools	The governing body
Foundation special schools	
Voluntary aided schools	
Independent schools	The governing body or proprietor
England	
Academies and free schools	The Academy Trust

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## Dedicated Schools Grant 2024-25: Provisional Allocations

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**Report being considered by:** Schools Forum

**On:** 4<sup>th</sup> December 2023

**Report Author:** Melanie Ellis

**Item for:** Discussion      **By:** All Forum Members

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### 1. Purpose of the Report

1.1 To set out the provisional Dedicated Schools Grant (DSG) allocation for 2024-25.

### 2. Recommendation

2.1 To note the provisional funding allocation.

### 3. Introduction

3.1 The National Funding Formula (NFF) is used by the Department for Education (DfE) to calculate the blocks within the Dedicated Schools Grant (DSG) that will be finalised in December 2023.

3.2 The DSG consists of four blocks: Schools, High needs, Central School Services and Early Years.

### 4. Overall position

4.1 The following table shows the provisional 2024-25 DSG allocation based on the October 2022 census pupil numbers. This will be updated in December 2023 for the October 2023 census.

DSG Provisional Allocation	Schools Block (Including growth)	High Needs Block	Central Schools Services Block	Early Years Block	Total
	£m	£m	£m	£m	£m
<b>2023/24 block funding</b>	127.44	27.39	0.97	10.85	166.65
Mainstream schools additional grant	4.33				4.33
High Needs Additional funding		1.10			1.10
<b>2023/24 total funding</b>	<b>131.77</b>	<b>28.50</b>	<b>0.97</b>	<b>10.85</b>	<b>172.09</b>
<b>2024/25 block funding</b>	<b>134.60</b>	<b>29.11</b>	<b>0.97</b>		<b>164.68</b>
Mainstream schools additional grant					0.00
High Needs Additional funding					0.00
<b>2023/24 total funding</b>	<b>134.60</b>	<b>29.11</b>	<b>0.97</b>	<b>0.00</b>	<b>164.68</b>
<i>Change from last year</i>	<i>2.83</i>	<i>0.61</i>	<i>0.00</i>		<i>-7.41</i>
<i>Percentage change</i>	<i>2.1%</i>	<i>2.2%</i>	<i>-0.2%</i>		<i>-4.3%</i>

## 5. Schools Block

- 5.1 2024-25 is the second year of the transition to the direct NFF for schools. In 2024-25, local authorities will only be allowed to use NFF factors in their local formulae, and must use all NFF factors. Local authorities will also be required to move their local formulae factors 10% closer to the NFF values, compared to where they were in 2023-24, unless they are already mirroring the NFF.
- 5.2 Nationally, funding through the NFF in 2024-25 is increasing by 1.9% per pupil compared to 2023-24. The provisional allocation for 2024-25 is shown below before any allocation for growth:

		2024/25		
Schools Block	2023/24 Total funding	Unit of funding	Number of pupils	Total funding
Primary	62,513,308	5,135.27	12,936.50	66,432,470
Secondary	62,451,438	6,390.70	10,348.50	66,134,125
Premises factor (NNDR)	1,589,347			2,032,395
<b>DfE allocation</b>	<b>126,554,093</b>			<b>134,598,990</b>
Growth	885,348			
<b>Total block allocation</b>	<b>127,439,441</b>			<b>134,598,990</b>
Block transfer	-			-
<b>Total formula funding</b>	<b>127,439,441</b>			<b>134,598,990</b>
NNDR direct allocation	- 1,597,037			- 1,832,054
<b>Total schools block after deductions</b>	<b>125,842,404</b>			<b>132,766,936</b>

- 5.3 A 2024-25 block transfer would reduce the schools block allocation by:

(a) 0.5% = £0.670m.

## 6. High Needs Block (HNB)

- 6.1 The national increase in high needs funding from 2023-24 to 2024-25 is 4.3%.
- 6.2 The 2024-25 provisional allocation for West Berkshire is £29.11m (2023-24 £27.4m), an increase of £0.6m from last year (2.2%).

## 7. Central Schools Services Block (CSSB)

- 7.1 The CSSB within the DSG provides funding for local authorities to carry out central functions on behalf of maintained schools and academies. This covers Statutory and Regulatory duties, Education Welfare, asset management and other duties such as licences, admissions and servicing of Schools' Forum.
- 7.2 The provisional CSSB DSG funding for 2024-25 is £970k, a reduction of £2.5k from last year (2%).

## 8. Early Years Block

- 8.1 The new Early Years formula was introduced in 2017-18 with new funding rates to local authorities, and a revised simplified formula for allocating funding to providers was also brought in. All providers are now on the same rates.
- 8.2 Funding for 2024-25 has yet to be announced.

# Central Schools' Services Block Budget 2024/25

**Report being considered by:** Schools' Forum on 4<sup>th</sup> December 2023

**Report Author:** Lisa Potts

**Item for:** Discussion **By:** All Forum Members

## 1. Purpose of the Report

1.1 To set out the budget proposal for services funded from the Central Schools' Services (CSSB) block of the DSG and to propose measures to enable the budget for this block to be balanced.

## 2. Recommendation

2.1 To balance the Central Schools Services Block by identifying cost reductions.

**Is the Schools' Forum required to make a decision as part of this report or subsequent versions due to be considered later in the meeting cycle?**

Yes:

No:

## 3. Implications and Impact Assessment

Equalities Impact:	Positive	No Impact	Negative	Commentary
	<b>A</b> Are there any aspects of the proposed decision, including how it is delivered or accessed, that could impact on inequality?		x	
<b>B</b> Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?		x		
<b>Data Impact:</b>		x		
<b>Consultation and Engagement:</b>				

## 4. Introduction/Background

- 4.1 The CSSB covers funding allocated to Local Authorities (LAs) to carry out central functions on behalf of pupils in state-funded maintained schools and academies in England. All the services funded by this block are statutory and have to be carried out.
- 4.2 The provisional allocation of funding for the Central Schools Services Block for 2024/25 is £970,887, which is a £2.5k or 0.25% reduction on the previous year.

## 5. Supporting Information

- 5.1 The following table shows the budget requirement for the services that fall within the Central Schools Services Block for 2023/24 compared to 2022/23.

Central Schools Services Block (CSSB)		2023/24 Budget	2024/25 Budget Requirement	Increase/Decrease	Change
		£	£	£	%
	<b>Budget Requirement:</b>				
1	School Admissions	215,761	222,615	6,854	3%
2	National Copyright Licences	168,092	179,859	11,767	7%
3	Servicing of Schools Forum	50,632	50,781	149	0%
4	Education Welfare	212,491	218,322	5,831	3%
5	Statutory & Regulatory Duties:				
a	Provision of Education Data	174,893	185,369	10,476	6%
b	Finance Support for the Education Service	80,067	82,494	2,427	3%
c	Strategic Planning of the Education Service	70,380	70,110	-270	0%
	<b>Total Budget Requirement</b>	<b>972,316</b>	<b>1,009,549</b>	<b>37,233</b>	<b>3.8%</b>

- 5.2 For 2024/25, staff on council pay grades have been budgeted at 3.5% pay award, which is where the majority of the increased costs have come from. Other increases relate to the cost of the Capita system.
- 5.3 The cost of copyright licence for schools is determined by the relevant national agencies. Details of all the other services included in the Central Schools Services Block (including a breakdown of costs) is given in Appendix A.
- 5.4 The table below shows the 2024/25 shortfall on the block of £39k, arising from a £36.5k increase in costs and a £2.5k decrease in funding.

Central Schools Services Block (CSSB)	2023/24 Budget	2024/25 Budget Requirement	Increase/Decrease	Change
	£	£	£	%
<b>Total Budget Requirement</b>	<b>972,316</b>	<b>1,009,549</b>	<b>37,233</b>	<b>3.8%</b>
<b>Funding:</b>				
Central Schools Services Block DSG	-973,313	-970,887	- 2,426	-0.2%
Surplus to fund shortfall on prior year deficit	997			
<b>Total Funding</b>	<b>-972,316</b>	<b>-970,887</b>		
<b>Balance</b>	<b>0</b>	<b>38,662</b>		

## 6. Options for Consideration

- 6.1 The current shortfall of £38,662 will be reviewed with the view to reducing the balance by the next round of meetings.

## 7. Appendices

- 7.1 Appendix A - Details and Costs of Central Schools' Services

## Details and Costs of Central Schools' Services

	Number of Posts	% Charged to CSSB	2024/25 £
<b>School Admissions</b>			
<b><u>Description of Statutory Duties covered</u></b>			
Administration of admissions process for maintained schools and academies			
<b><u>Staffing Structure</u></b>			
Admissions and Transport Manager	1.00	80%	
Admissions Officers	2.50	80%	
<b><u>Breakdown of Costs</u></b>			
Staff salary costs			151,380
Employee Expenses & recharge of appeals costs			18,700
Supplies and Services			1,320
Capita One recharge			25,844
Support Service Recharges			25,372
<b>TOTAL ELIGIBLE EXPENDITURE FOR ADMISSIONS</b>			<b>222,615</b>
<b>Servicing the Schools Forum</b>			
<b><u>Description of Statutory Duties covered</u></b>			
Setting agendas, minute taking, co-ordination and distribution of papers for Schools Forum and its sub groups			
<b><u>Staffing Structure</u></b>			
Head of Education	1.00	10.00%	
Schools Finance Team	1.81	10.00%	
Schools Forum Clerk			
<b><u>Breakdown of Costs</u></b>			
Staff salary costs			44,640
Room hire, consumables and members expenses			1,610
Support Service Recharges			4,531
<b>TOTAL ELIGIBLE EXPENDITURE FOR SERVICING THE SCHOOLS FORUM</b>			<b>50,781</b>



	Number of Posts	% Charged to CSSB	2024/25 £
<b>Education Welfare</b>			
<b><u>Description of Statutory Duties covered</u></b>			
Tracking of children who can be legally removed from the school roll.			
Monitoring of elective home education.			
Issuing and monitoring of child work permits and performance licences.			
Attendance at core group meetings for specific pupils			
Advice on keeping registers			
Progress cases to court where appropriate. Maintain up to date knowledge of legal processes and proceedings so			
<b><u>Staffing Structure</u></b>			
Principal Education Welfare and Safeguarding Officer	1.00	40%	
Senior Education Welfare Officer	0.40	90%	
Education Welfare Officers	3.54	38%	
Assistant Education Welfare Officer	1.00	90%	
Administrative Assistant	0.40	90%	
<b><u>Breakdown of Costs</u></b>			
Staff salary costs			176,728
Employee expenses/car allowances			4,900
Other non staffing costs			3,030
Income from fines			-11,350
Capita One Recharges			11,487
Support Service Recharges			33,527
<b>TOTAL ELIGIBLE EXPENDITURE FOR EDUCATION WELFARE</b>			<b>218,322</b>
	Number of Posts	% Charged to CSSB	2024/25 £
<b>Provision of Education Data</b>			
<b><u>Description of Statutory Duties covered</u></b>			
Statutory returns to DfE			
Data analysis and reporting e.g. Exam results, performance			
School census administration and reports			
<b><u>Staffing Structure</u></b>			
Staffing	2.00	75%	
<b><u>Breakdown of Costs</u></b>			
Staff salary costs			83,370
Capita One recharge			88,407
Support Service Recharges			13,592
<b>TOTAL ELIGIBLE EXPENDITURE FOR PROVISION OF EDUCATION DATA</b>			<b>185,369</b>

	Number of Posts	% Charged to CSSB	2024/25 £
<b>Finance Support for the Education Service</b>			
<b><u>Description of Statutory Duties covered</u></b>			
DSG services budget preparation, monitoring, and year end			
Education services budget preparation, monitoring, and year end			
School funding formula and early years funding formula			
Administration of funding allocations to all schools for early years and high needs			
Statutory returns e.g. APT, S251, CFO deployment of DSG			
<b><u>Staffing Structure</u></b>			
Chief Mgt Accountant	1.00	5%	
Education Finance Manager	0.81	15%	
Education Senior Accountant	0.61	50%	
Education Accountant	0.50	65%	
Accountant	1.00	50%	
<b><u>Breakdown of Costs</u></b>			
Staff salary costs			67,090
Support Service Recharges			15,404
<b>TOTAL ELIGIBLE EXPENDITURE FOR FINANCE SUPPORT</b>			<b>82,494</b>
<b>Strategic Planning of the Education Service</b>			
<b><u>Description of Statutory Duties covered</u></b>			
Strategic planning and management of the Education service as a whole			
<b><u>Staffing Structure</u></b>			
Head of Education	1.00	52%	
Other staffing	1.00	27%	
<b><u>Breakdown of Costs</u></b>			
Staff salary costs			70,110
Other staff costs			0
Support Service Recharges			0
<b>TOTAL ELIGIBLE EXPENDITURE FOR PLANNING OF EDUCATION SERVICE</b>			<b>70,110</b>

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## Deficit Schools

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**Report being considered by:** Schools Forum on 4<sup>th</sup> December 2023

**Report Author:** Melanie Ellis

**Item for:** Information **By:** All Maintained Schools Representative

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### 1. Purpose of the Report

1.1 This report provides details of the nine schools which were requested to submit license deficit applications for 2023/24.

### 2. Recommendation

2.1 That the report be noted.

### 3. Introduction/Background

3.1 Schools are permitted to set a deficit budget if they meet certain conditions. This is termed a licensed deficit. The conditions of a licensed deficit are set out in the Scheme for Financing Schools (the legal contract the Council has with schools) and include the following statement, "The recommended length over which schools may repay the deficit, i.e. reach at least a zero balance, with appropriate mechanism to ensure that the deficit is not simply extended indefinitely, is three years. The maximum length of repayment is five years."

3.2 If the conditions are not met by the school, the Council has the power to issue a Notice of Concern, which ultimately could mean removal of a school's delegation.

3.3 The Council has adopted a strategy aimed to minimise the number and size of deficits. It is in two parts:

- (1) Procedures to support schools to reduce/eliminate or avoid a deficit.
- (2) Intervention for schools not meeting their deficit recovery plan.

3.4 Approval of a licensed deficit requires the school to do the following:

- (1) Submit monthly budget monitoring and forecasting reports (Month 3 and then Month 6 to Month 11 inclusive) and other information as detailed in Appendix A.
- (2) Submit a copy of draft and final governor meeting minutes (including Part 2) where the budget is discussed.
- (3) Attend meetings with the local authority when requested to address any budget concerns.
- (4) Submit deficit recovery progress reports when requested.

## Deficit Schools

- (5) Submit a five-year detailed deficit recovery plan.
- (6) Take part in any review the authority commissions on the school's budget deficit position and recovery plan, including a Schools Resource Management Advisor deployment.
- (7) Take part in the introduction and use of any additional analysis and data tools deemed appropriate.

3.5 The council's Schools Finance team includes a dedicated resource to work with the schools that are operating in a deficit and to offer support to those who are likely to enter a deficit position.

## 4. Supporting Information

4.1 Nine schools submitted a WBC Deficit Budget License Application for the financial year 2023/24. These schools ended the financial year 2022/23 as follows:

- Four ended 2022/23 with an unlicensed deficit,
- Two ended 2022/23 with a deficit that exceeded their licensed deficit,
- Three ended 2022/23 with a surplus but have set a deficit budget for 2023/24.

4.2 Historic information for the nine schools is shown in Table 1:

**Table 1**

School Main School Budget (*= includes PPG)	2020/21		2021/22		2022/23	
	Budget	Actual	Budget	Actual	Budget	Actual
Beenham Primary School	£110	(£363)	£1,170	£20,936	£310	(£31,015)
Brimpton Primary School	£1,070	£21,845	£32,850	£11,308	£1,590	(£30,834)
Kennet Valley Primary School	£25,780	£48,726	£48,870	£82,901	£51,500	£50,592
Long Lane Primary School*	£13,070	£13,849	£25,580	£10,279	£10,800	(£76,173)
Pangbourne Primary School	£4,760	£15,341	£0	£3,804	£740	£520
Spurcroft Primary School*	£13,470	(£40,624)	(£29,670)	(£79,302)	(£70,310)	(£138,281)
St Finian's Catholic Primary School*	(£34,310)	(£20,657)	£4,820	£0	£6,800	(£33,935)
St John and St Nicolas Schools Federation*	£5,060	£66,111	£78,760	£74,283	£22,240	£11,214
St Joseph's Catholic Primary School	£270	£11,678	£540	(£7,173)	(£63,710)	(£85,585)
<b>TOTAL</b>	<b>£29,280</b>	<b>£115,906</b>	<b>£162,920</b>	<b>£117,036</b>	<b>(£40,040)</b>	<b>(£333,497)</b>

Figures in red parentheses indicate a deficit.

4.3 Following a detailed review of each of the license deficit applications eight of the nine deficits have been licensed. The eight schools have been informed. The total value of the eight licensed deficits is £455,009 (Table 2 below). The ninth school, St Joseph's, has been asked to provide missing data before a license can be approved.

**Table 2**

## Deficit Schools

School Main School Budget	License Deficit Application 2023/24 Budget Closing Balance				
	2023/24	2024/25	2025/26	2026/27	2027/28
Beenham Primary School	(£3,100)	£348	(£5,149)	£42,185	£50,667
Brimpton Primary School	(£19,633)	£15,614	£39,342	£48,597	£54,963
Kennet Valley Primary School	(£5,615)	(£9,123)	£23,496	£84,204	£58,991
Long Lane Primary School	(£23,900)	£18,992	£54,297	£75,777	£98,799
Pangbourne Primary School	(£47,736)	(£31,651)	£18,257	£83,449	£184,504
Spurcroft Primary School	(£187,280)	(£88,979)	£11,480	£143,236	£305,081
St Finian's Catholic Primary School	(£85,968)	(£65,786)	(£22,957)	£5,687	£24,046
St John and St Nicolas Schools Federation	(£81,777)	(£94,022)	(£43,242)	(£10,187)	£15,579
St Joseph's Catholic Primary School					
<b>TOTAL</b>	<b>(£455,009)</b>	<b>(£254,607)</b>	<b>£75,524</b>	<b>£472,948</b>	<b>£792,630</b>

Figures in red parentheses indicate a deficit.

- 4.4 As is normal practise, the nine schools have been asked to submit additional reporting to WBC Schools Accountancy for review. (See Appendix A for submission deadline table).

## 5. Proposals

- 5.1 To note

## 6. Conclusion

- 6.1 The total school deficits over the last three years are shown in Table 3.

**Table 3**

All Schools Main School Budget	Actual		
	2020/21	2021/22	2022/23
<b>Total Deficit</b>	<b>(£78,088)</b>	<b>(£171,692)</b>	<b>(£424,542)</b>
<b>Number of schools in deficit</b>	5	6	8
<b>Average deficit</b>	<b>(£15,618)</b>	<b>(£28,615)</b>	<b>(£53,068)</b>

Figures in red brackets indicate a deficit.

- 6.2 School balances continue to be impacted by Covid -19, this is most noticeable where some schools previously relied on income generated by Out of Hours Club schools to balance their budgets, demand has failed to return to pre covid levels and schools continue to try to recover from this during 2023/24.

- 6.3 In addition to inflationary and other increases to costs, unplanned falling pupil numbers and a reported growing number of children presenting with additional needs are creating increasing budgetary pressure in schools.

## 7. Appendices

- 7.1 Appendix A – Submission Timetable for 2023/24

## Deficit Schools

SUBMISSION TIMETABLE DEFICT SCHOOLS 2023/24								
Period covered by Agresso Report	Budget Monitoring (All fund codes)	Forecast (All fund codes)	Agresso FMS Reconciliation (All fund codes)	Bank Statement, FMS Reconciliation & Historical Unreconciled Bank Transactions reports	Salary Projection - Name as below <u>To be produced before commitment cleared</u> Please provide reasons for any variation over £1 <b>N.B. not required if a federated budget</b>	Salary Projection - Full Year Breakdown Screen print as below after commitment has been cleared <b>N.B. not required if a federated budget</b>	FMS Outstanding Purchase Order report Please explain why any order over <u>2</u> months old has not been cleared	Submission Deadline (midnight)
Period 3 / June	Yes	No	Yes	Yes	Yes	Yes	Yes	20/07/2023
Period 6 / September	Yes	Yes	Yes	Yes	Yes	Yes	Yes	13/10/2023
Period 7 / October	Yes	Yes	Yes	Yes	Yes	Yes	No	14/11/2023
Period 8 / November	Yes	Yes	Yes	Yes	Yes	Yes	No	14/12/2023
Period 9 / December	Yes	Yes	Yes	Yes	Yes	Yes	Yes	19/01/2024
Period 10 / January	Yes	Yes	Yes	Yes	Yes	Yes	No	21/02/2024
Period 11 / February	Yes	Yes	Yes	Yes	Yes	Yes	No	14/03/2024

# Agenda Item 16

## Schools Forum Work Programme 2023/24

	Item	HFG Deadline	Heads Funding Group	SF Deadline	Schools Forum	Action required	Author
Term 3	Final DSG Funding Settlement Overview 2024/25	03/01/2024	10/01/2024	16/01/2024	22/01/2024	Discussion	Melanie Ellis
	Final School Funding 2024/25	03/01/2024	10/01/2024	16/01/2024	22/01/2024	Decision	Melanie Ellis
	Final Central School Block Budget Proposals 2024/25	03/01/2024	10/01/2024	16/01/2024	22/01/2024	Decision	Lisa Potts
	Growth Fund 2023/24	03/01/2024	10/01/2024	16/01/2024	22/01/2024	Information	Melanie Ellis
	Permanent Exclusion Policy	03/01/2024	10/01/2024	16/01/2024	22/01/2024	Discussion	Lisa Potts
	DSG Monitoring 2023/24 Month 9			16/01/2024	22/01/2024	Information	Lisa Potts/Michelle Sancho
	Deficit Schools ( <i>standing item</i> )	03/01/2024	10/01/2024	16/01/2024	22/01/2024	Information	Melanie Ellis
Term 4	Work Programme 2024/25	20/02/2024	27/02/2024	05/03/2024	11/03/2024	Decision	Jessica Bailiss
	Delivering Better Value Programme Update	20/02/2024	27/02/2024	05/03/2024	11/03/2024	Discussion	Jane Seymour
	Final High Needs Block Budget 2024/25	20/02/2024	27/02/2024	05/03/2024	11/03/2024	Decision	Jane Seymour
	Final Early Years Block Budget 2024/25	20/02/2024	27/02/2024	05/03/2024	11/03/2024	Decision	Avril Allenby
	DSG Monitoring 2023/24 Month 10			05/03/2024	11/03/2024	Information	Lisa Potts/Michelle Sancho
	Deficit Schools ( <i>standing item</i> )	20/02/2024	27/02/2024	05/03/2024	11/03/2024	Information	Melanie Ellis

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*The Schools' Forum must be consulted when the local authority is proposing a contract for supplies and services which is to be funded from the Schools Budget (Dedicated Schools Grant (DSG)) and is in excess of the EU procurement thresholds (£170,781.60).*

Contract Title	Contract Start Date	Contract End Date (initial term)	Contract End Date (Including any Extension)	Contract Term in years (in brackets maximum possible extension)	Contract Total Value (£) based on Initial Term	Contract Amount (Total Value inclusive of Contract Extension Agreed)	Supplier name	WBC Responsible Officer	Notes
Managed Cloud-based Services for Schools (WAN) RM6103	01/04/2020	31/03/2022	31/03/2024	2 (2)	£240,000	£480,000	RM Education Ltd	Thomas Ng	This contract is not funded from the DSG - Information item only.  WAN provisions are now decided by individual schools and not through any central ring-fenced funding. Information regarding this contract will therefore be removed from the contracts forward plan going forward. If anyone has any queries regarding specific WAN provisions, please let Jess Bailiss know who will follow this up with Thomas Ng.
Special Educational Needs and Disabilities (SEND) Information, Advice and Support Service (SENDIASS)	01/08/2021	31/07/2024	31/07/2024	3 (4)	£164,850	Extension value yet to be confirmed	Rose Road Association	Thomas Bailey / Thomas Ng	This contract is not funded from the DSG. Information item only. It was last brought to the Forum for information in July 2021.
West Berkshire Schools Meals Service	24/07/2020	23/07/2023	23/07/2025	3 (2)	£600000approx	£1,000,000	Caterlink	Kiki Hurford	Invoices are paid directly from schools that opted to be in the contract. The contract is centrally managed by a WBC Officer.
Education Packages for Young People with Severe Social Emotional and Mental Health Difficulties	01/09/2020	31/08/2023	31/08/2025	3 (2)	£1,674,000	£2,790,000	Engaging Potential LTD	Jane Seymour	Information on this contract was included within the High Needs Block Report brought to the Forum in March 2023.
Energy Framework - CCS framework RM6011 - Electricity	01/04/2017 (rolling contract since 2008)	01/10/2023	31/03/2025		£5,421,522		EDF (HH)	Adrian Slaughter/Sarah Wood	Schools can opt in or out of the Central Energy Contract which is procured through the Crown Commercial Service Energy Framework. We are in an 'L12' contract which relates to the number of months over which the energy is bought (12 months). There is a 24 month notice period for a school to leave the Framework.
Energy Framework – CCS Framework RM6011 - Gas	01/04/2017 (rolling contract since 2008))	01/10/2023	31/03/2025		£1,325,589		Total	Adrian Slaughter/Sarah Wood	<i>(Note, L stands for Locked and means the price is locked for the year. The number next to L represents the buying period in months over which the CCS Energy Brokers will be buying the council's energy requirements. As 'L12' the Brokers have already started buying the energy for delivery in financial year 2024/25.)</i>
Children and Young People's Integrated Therapies (CYPIT)	01/04/2023	31/08/2028	31/03/3031	5 (3)	£2,348,480	£3,757,568	Berkshire Healthcare Foundation Trust	Kiki Hurford / Thomas Bailey	A report was brought to the Schools' Forum meeting in October 2022 and the new therapy contract was agreed.

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