# Notice of Meeting

# **Schools Forum**

## Monday 30th October 2017 at 5.00pm at Shaw House Church Road Newbury RG14 2DR

Date of despatch of Agenda: Tuesday, 24 October 2017

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 e-mail: jessica.bailiss@westberks.gov.uk

Further information and Minutes are also available on the Council's website at <u>www.westberks.gov.uk</u>



Forum Members: Reverend Mark Bennet, Ben Broyd, Anthony Chadley, Jonathon Chishick, Catie Colston, Jacquie Davies, Chris Davis, Paul Dick, Lynne Doherty, Antony Gallagher, Keith Harvey, Reverend Mary Harwood, Angela Hay, Jon Hewitt, Lucy Hillyard, Peter Hudson, Brian Jenkins, Mollie Lock, Patrick Mitchell, Chris Prosser, David Ramsden, Graham Spellman (Vice-Chairman), Bruce Steiner (Chairman), Suzanne Taylor, Keith Watts and Charlotte Wilson

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Andy Day Head of Strategic Support

If you require this information in a different format or translation, please contact Moira Fraser on telephone (01635) 519045.



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### DRAFT

## Agenda Item 2

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

### **SCHOOLS FORUM**

### MINUTES OF THE MEETING HELD ON MONDAY, 17 JULY 2017

Anthony Chadley, Present: Reverend Mark Bennet, Councillor Jonathon Chishick, Catie Colston, Jacquie Davies, Chris Davis, Paul Dick, Councillor Lynne Doherty, Antony Gallagher, Keith Harvey, Angela Hay, Jon Hewitt, Brian Jenkins, Julia Mortimore. Graham Spellman (Vice-Chairman), Bruce Steiner (Chairman) and Sheilagh Peacock, Suzanne Taylor

**Also Present:** Gabrielle Esplin (Finance Manager (Capital, Education and Treasury Management)), Ian Pearson (Head of Education Service), Claire White (Finance Manager (Schools)), Katharine Andrews (Accountant (Schools)), Helen Newman (Governor at the Willink School) and Jessica Bailiss (Policy Officer)

**Apologies for inability to attend the meeting:** Ben Broyd, Lucy Dawe, Reverend Mary Harwood, Peter Hudson, Councillor Mollie Lock, Chris Prosser, David Ramsden, Keith Watts and Charlotte Wilson

#### PART I

#### 14 Minutes of previous meeting dated 19th June 2017

The Minutes of the meeting held on the 19<sup>th</sup> June 2017 were approved as a true and correct record and signed by the Chairman.

#### 15 Actions arising from previous meetings

There was one action outstanding regarding the vacant governing body position on the Schools' Forum. The Chairman welcomed Helen Newman, who would be observing the meeting with a view to taking on the vacant governor role.

#### 16 Declarations of Interest

There were no declarations of interest received.

#### 17 Membership

The Chairman announced that it was Sheilagh Peacock's last meeting of the Schools' Forum and thanked her for the contribution that she had made during her time as a Member of the Forum. Patrick Mitchell, School Business Manager at Francis Baily School would assume the position from September 2017.

#### 18 Schools' Forum Membership and Constitution from September 2017 (Jessica Bailiss)

The Schools' Forum considered a report (agenda item six), which present a review of the membership of the Schools' Forum. Jessica Bailiss reported that there was a requirement to review the membership and Constitution annually and that there had been no changes to the Schools' Forum regulations, which required changes to the Constitution.

Jessica Bailiss stated that the membership for the Schools' Forum must reflect the proportion of pupils within each sector. Although there had been a slight increase in

academies, changes in pupil numbers across the sectors were not significant enough to require a change to the composition of the Forum.

Section four of the report listed members who would reach the end of their term in the coming months. Members would be contacted individually with the action they needed to take as set out in the Constitution.

In accordance with the report Jessica Bailiss invited Members to raise any questions and approve the Membership and Constitution from September 2017.

Catie Colston informed the Schools' Forum that when nominated for her position on the Forum, she had been the Chair of Governors at St Nicolas' Primary School however, she had since become the Chair of Governors at Enborne Primary School and questioned whether she needed to declare this and if it would affect her position. Ian Pearson confirmed that because her new role also fell within the Primary sector there was no issue. For clarity Ian Pearson added that this would only have become an issue if a role changed to a different sector, for example from Primary to Academy where all positions were occupied.

The Chairman invited members of the Forum to vote on whether to approve the membership and Constitution of the Schools' Forum from September 2017. Keith Harvey proposed that the recommendation within the report be approved and this was seconded by Chris Davis.

**RESOLVED that** the membership and Constitution from September 2017 be approved.

#### 19 Primary Schools in Financial Difficulty - Bid for Funding (Claire White)

Claire White introduced the report (agenda item seven), which summarised a bid that had been received from a school in deficit to access funding from the schools in financial difficulty de-delegated fund.

Since April 2013, local authorities had been required to delegate to all schools the contingency previously held for schools in financial difficulty. Each phase in the maintained sector then had the option to de-delegate and pool this funding with allocations made to schools that required it. This decision was made on an annual basis.

The budget for 2017/18 was £314,650, which included the carry forward of the unspent budget from 2016/17 of £194,670. No payments had so far been made in the 2017/18 financial year.

A bid had been received from Long Lane Primary School for £28,000 (out of a total deficit of £55,740) to cover one-off redundancy payments. The school had been managing an annual reduction in pupil numbers over the previous four years, mainly due to Purley Infants becoming a primary school. The main reason for the deficit was that pupil numbers were over estimated within the school's longer term planning.

The bid for funding had been received by the Heads Funding Group on the 5<sup>th</sup> July 2017 and it was recommending approval of the bid (subject to verification of the robustness of the deficit recovery plan), with payment being the actual redundancy costs incurred up to a maximum of £28k.

Keith Harvey, who also sat on the Heads Funding Group, expressed the view that it was a strong bid and it was clear that it was being required for exceptional circumstances.

Paul Dick referred to paragraph 4.4 of the report and raised concern that the deficit recovery plan had not yet been reviewed in detail by Finance Officers at West Berkshire Council. Claire White confirmed that they had not yet been through the deficit plan in detail. In the unlikely event there was an issue which significantly changed their deficit position, the bid would be brought back to the Schools' Forum.

Catie Colston questioned how far ahead the school had looked in terms of the effects of staff reductions on maintaining standards. Ian Pearson stated that this had not yet been set out in the context of discussions. Consideration had been given to what staffing was deemed as appropriate for the size of the primary school.

The Chairman invited Members of the Forum to vote on whether to approve the bid from Long Lane Primary School. Chris Davis proposed that the bid should be approved and this was seconded by Catie Colston.

**RESOLVED that** the bid for Long Lane Primary School be approved (subject to verification of the robustness of the deficit recovery plan).

#### 20 Schools Funding Arrangements for 2018/19 (Claire White)

Claire White reported that there was no new information to report. There had been a Government announcement shortly prior to the meeting and it was anticipated that more detail would be available by September 2017.

# 21 Resource Units - additional funding for exceptional circumstances (Claire White)

Claire White introduced the report (agenda item nine) to the Schools' Forum, which set out a proposal to provide additional funding for resource units who need to stagger the entry for new pupils due to start at the unit at the same time.

West Berkshire currently had nine resource units at primary and secondary schools and a tenth was due to open in September 2017. Each provided specialist support and in West Berkshire there were units for pupils with physically disabilities, speech and language difficulties, autistic spectrum disorder (ASD), hearing impairments and specific literacy difficulties.

Each unit received funding of £10k for the number of places it supported. Sixth form places were funded at £6k in addition to the sixth form funding.

In most units the place funding did not cover the costs, so in addition top up funding was paid for each pupil in a unit. This funding "follows the pupil" and was paid by the local authority where the pupils lived. In West Berkshire there were three top up funding bands specific to each unit. The current funding rates were introduced in 2013 based on staff ratios for the number of pupils in the unit and at the relevant salary costs at that time, plus an allowance for non staffing costs.

The place funding and top up rates had not increased with inflation since they were originally introduced and in 2017/18 they were reduced by 0.5% as part of the high needs block savings requirement.

Although funding was fixed for a year, top up funding could vary if there was movement of pupils. Generally however the number of pupils would stay much the same for the year and as and when pupils left, their places would be refilled as soon as possible. Schools could therefore plan their unit budgets and staffing structures around the number of places and expected pupil numbers.

An exceptional circumstance had arisen at Theale Primary ASD Unit. Three pupils were due to leave the unit at the end of the summer term and although there were three pupils waiting to enter the unit, due to the complexity of their needs it was not possible to admit them all into the unit at once and they would therefore need to be integrated at different times. Not placing the pupils at the same time would have an impact on the unit's funding (approximately £10k shortfall).

It was proposed that if any unit met the specific criteria for this exceptional circumstance, then additional funding would be payable as set out in section 5.2, 5.3 and 5.4 of the report.

Claire White explained that to ensure funding was fair and that the school was not disadvantaged by an exceptional circumstance beyond its control, additional funding as proposed would ensure other pupils in the unit were not disadvantaged in any way.

Claire White confirmed that it would be additional funding from the high needs block and Paul Dick expressed his view that with a sensible time limit, the proposal should be supported.

Jonathon Chishick queried what would happen if three children needed to transition from a primary unit to secondary unit however, there was not space available. Ian Pearson reported that children would have to be held at a primary unit if they could not be taken into a secondary unit. Jonathon Chishick further questioned if the unit where they remained would be funded accordingly and Ian Pearson confirmed that funding would be provided whilst they remained in the unit. It was thought that in this particular circumstance the pupils had been placed in different secondary provision.

The Chairman invited members of the Forum to vote on the proposal. Catie Colston proposed that the recommendation by the Heads Funding Group for approval of the proposal as set out in paragraph 5 of the report, be approved. This was seconded by Paul Dick.

**RESOLVED that** the proposal as set out in paragraph 5 of the report be approved.

# 22 School Budgets 2017/18 and Schools in Financial Difficulty (Claire White)

Claire White introduced the report (agenda item 10) which set out the overall position of maintained schools' three year budgets, highlighting some key observations, and detailed the strategy that the Council intended to follow for schools in financial difficulty.

Table 1 on page 29 of the report showed the position of schools' budgets. Although the number of schools setting a surplus budget (48) had stayed much the same, there had been a growth in the number of schools setting a deficit budget (11). There was a worrying trend that the number of schools in deficit was continuing to increase.

Table 2 showed the overall balances compared to the original budget/forecast. In 2016/17 the actual net balances were over £2m higher than the original budget. This illustrated the cautious approach that was being taken by schools and it was a trend that was not uncommon. In reality schools had a tendency to set budgets at the worst case scenario and through making careful spending decisions throughout the year were able to make improvements.

Highlighting Table 3, Claire White reported that there were eleven schools with a deficit budget for 2017/18 compared to seven last year (two of the seven schools setting a deficit in 2016/17 had a balanced budget for 2017/18). All except Beenham had improved on their forecast position, which emphasised the hard work most schools were putting in to improving their financial positions.

Looking at the year two and three forecasts, a significant overall net deficit balance would occur if schools took no action. This position was unlikely to materialise, as most schools would do what was necessary to balance their budget, with some taking difficult decisions regarding changes to the way they operated. However, the year two deficit figure was nearly £1m greater than the same figure last year.

Many of the schools that had closed the 2016/17 financial year with an unplanned deficit and had gone into deficit in 2017/18 were those who had left it too late to take action, particularly if the deficit was large and the only option was to restructure.

In their forward planning schools would have assumed that funding rates per pupil would remain the same however, the proposed new national funding formula would change the likely funding each school would receive. As soon as new rates were known, schools would need to reassess their positions.

Claire White drew attention to section 6 of the report which outlined the proposed strategy to reduce the number and size of deficits. Headteachers would join senior finance staff in reviewing, challenging and advising on deficit recovery plans at those schools which were facing problems.

Proposed intervention for schools not meeting their deficit recovery plan was set out in section 6.5 of the report.

Claire White concluded that many schools in West Berkshire had successfully managed to balance and control their budgets, and had taken action to reduce costs, for which they must be commended. Action still needed to be taken to prevent further deficit.

Reverend Mark Bennett recalled that money had been awarded to Kintbury Primary School to support them with staff restructuring however, he noted that the school was still in deficit and queried if the plans had failed. Claire White commented that recovery often took time however, Kintbury Primary School had suffered a lower pupil intake than anticipated. Ian Pearson added that there had been a new Headteacher at the school who was working hard to turn the situation around. The viability of a school was often reliant on pupil numbers.

Chris Davis queried if everything possible was being done to help Parsons Down Primary School set its budget. Claire White reported that the school had a deficit budget of about £80k and that work was now being undertaken with the school to help turn this around.

Graham Spellman commented that the situation would get worse as time went by and he was concerned about the huge gap in forecasting from one year to the next. He questioned, given the huge need for support, if there was enough funding available for Officers to be able to provide this. Claire White reported that the strategy that the Council intended to follow for schools in financial difficulty had been agreed by the Council's Operations Board and therefore the necessary funding was in place.

Paul Dick commended the report and that the strategy for improvement involved Headteachers.

Brian Jenkins asked for clarification on paragraph 6.7 which suggested that the possibility of charging the cost of support back to schools would need to be explored. He expressed his view that this would be unhelpful to school which were already struggling. Claire White reported that the Council's Operation's Board had asked for more information on charging schools. Ian Pearson added that this would only be considered once a school had balanced its budget.

Councillor Lynne Doherty referred to the very recent announcement from the Government regarding school funding and commented that efficiency offers and a central resource had been mentioned, both of which could be extremely helpful to schools.

**RESOLVED that** the Schools' Forum noted the report.

#### 23 DSG Monitoring Month 3 (lan Pearson)

Ian Pearson drew attention to the report (agenda item 11) which set out the current financial position of the services funded by the Dedicated Schools Grant (DSG), highlighting any under and over spends.

Ian Pearson highlighted the current position of each of the blocks. There was no variance forecast for the Schools Block at that stage in the year.

Table 3 set out the current position of the early years block and there was no variance at that point in time. The early years block was very difficult to predict due to the volatile nature of both the early years block funding and payments to providers.

Table 4 set out the current position of the High Needs Block, which was also showing no variance. There was an agreed overspend in this area.

Ian Pearson concluded that there were currently no significant variances, though it was not usually until the autumn term that changes to high risk budgets such as the high needs top up and early years payments became apparent.

**RESOLVED that** the Schools' Forum noted the report.

#### 24 Vulnerable Children's Fund - Annual Report for 2016/17

Ian Pearson presented the report (agenda item 12) on behalf on Michelle Sancho who was unable to attend the meeting. The purpose of the report was to give a review of the Vulnerable Children's Fund (VCF) for 2016/17.

The report had been requested by the Schools' forum and the VCF sat within the High Needs Block. The VCF was a highly appreciated, relatively small fund for small schools who experienced unexpected additional financial pressures due to in-year admissions of children with challenging behaviour. It was specifically devised to promote social inclusion, reduce exclusions and reduce the pressure on SEN budgets by providing temporary funding.

Ian Pearson reported that Table 1 of the report showed how the VCF had been utilised. Case studies were also provided at the back of the report using fictitious names.

Councillor Lynne Doherty referred to paragraph 3.3 and noted that only 13 schools had responded to a survey regarding the VCF. Councillor Doherty expressed the view that providing feedback should have been a condition of receiving the grant. Councillor Doherty felt that there was a lack in awareness of the grant and questioned how schools were made aware of its existence. Ian Pearson commented that most schools should be aware of how to access the fund and also had access to minutes of the Schools' Forum however, effort would be made to publicise the VCF further.

**RESOLVED that** the Schools' Forum noted the report.

#### 25 Forward Plan

**RESOLVED that** the Schools' Forum noted the Forward Plan.

#### 26 Any Other Business

There was no other business raised.

#### 27 Date of the next meeting

The next meeting would take place on Monday 30<sup>th</sup> October 2017, 5pm at Shaw House.

(The meeting commenced at 5.00 pm and closed at 5.48 pm)

CHAIRMAN	
Date of Signature	

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# Agenda Item 3

Ref No.	Date of meeting(s) raised	ltem	Action	Responsible Officer	Comment / Update
Jan17-Ac2	19th June 2017 6th March 2017 23rd Jan 2017 5th Dec 2016 10th Oct 2016	Membership	David Ramsden	and David Ramsden	Action now complete - Helen Newman will become the new Secondary Governor representative from September 2017.

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# Dedicated Schools Grant (DSG) Budget 2018/19 - Overview

Report being considered by:	Schools Forum		
On:	30/10/2017		
Report Author:	Claire White		
Item for:	Discussion	By:	All Forum Members

#### 1. Purpose of the Report

1.1 To set out the changes to the calculation of the Dedicated Schools Grant (DSG) in 2018/19, and the implications of these changes on the Schools Budget.

#### 2. Recommendation

2.1 To note the changes, the timetable, and decisions that will be required in the setting of the 2018/19 Schools Budget.

Will the recommendation require the matter		
to be referred to the Council or the	Yes:	No: 🔀
Executive for final determination?		

#### 3. Introduction

- 3.1 Over the last two years, the Government has carried out two consultations on their proposed changes to School and High Needs funding. The second stage consultations closed on 22 March 2017, and the results of these were published in September 2017.
- 3.2 The Government has now announced the funding arrangements for 2018/19. Following on from the consultations, there are a number of significant changes to the way the Dedicated Schools Grant (DSG) will be calculated for 2018/19.
- 3.3 There will be an additional funding block Central Schools Services Block which will sit alongside the existing three funding blocks of Schools, Early Years, and High Needs.
- 3.4 There is a new formula used to calculate the funding allocation for the Schools Block, Central School Services Block, and High Needs Block. A new formula for calculating Early Years was introduced from April 2017.
- 3.5 The rules around moving funding between blocks have changed.
- 3.6 This report summarises how each block will be calculated in 2018/19, and the likely impact of the estimated funding allocations on the 2018/19 budget. The actual allocations for 2018/19 will be announced by the Government mid December though for Early Years and High Needs, these will be provisional, and the budgets for these blocks will need to be set using estimates.

#### 4. Schools Block

- 4.1 The biggest change is the Schools Block with the introduction of the National Funding Formula (NFF) from April 2018. For at least the next two financial years, it will be operated as a "soft" formula. This means that the local authority will still receive Schools Block DSG and will determine locally how this is then allocated to schools.
- 4.2 The schools block funding for 2018/19 is calculated as follows:
  - The national funding formula at the national rates is run for each school. This is based on October 2016 census data and pupil numbers.
  - An area cost adjustment (ACA) is added to the total sum for each school (1.0341 for West Berkshire).
  - Each school is allocated as a minimum a 0.5% per pupil increase against their baseline or a 3% per pupil funding cap against their baseline (the baseline is the 2017/18 formula allocation plus formula funding for the pupil numbers in resource units added back in).
  - For primary schools, the minimum per pupil funding level in 2018/19 is set at £3,300, and for secondary £4,600 (all West Berkshire schools will be above this level). It is therefore possible that in the lowest funded local authorities the gains will be more than 3%.
  - The allocations for every school in the local authority are added up and divided by the October 2016 pupil numbers. This produces a Primary Unit of Funding (£3,875 PUF) and a Secondary Unit of Funding (£4,925 SUF). These units are now set for 2018/19.
  - In December 2017, the PUF and SUF will be multiplied by the October 2017 primary and secondary pupil numbers to produce the schools block DSG allocation.
  - A sum for growth funding is added (equal to the 2017/18 local authority budget plus or minus carry forward from 2016/17), to give the final DSG total.
- 4.3 The local authority in consultation with the Schools' Forum will set aside funding required for the growth fund in 2018/19. The balance is then distributed to schools through the formula, by setting the formula funding rates and a minimum funding guarantee and funding cap on gains. The method of distributing the funding will need to go out to consultation with all schools and be agreed by Schools' Forum in December, before being approved by the Council's Executive in January.
- 4.4 With the agreement of Schools' Forum, and subject to consulting with all schools, up to 0.5% of the total schools block funding can be transferred to the high needs budget or other funding blocks. Secretary of State approval is required for transfers above this limit or where the Schools' Forum has opposed the transfer.
- 4.5 Overall, West Berkshire gains from the NFF by 1.3% or £1.3m, but the final allocation will be determined by the October 2017 census.

- 4.6 It will be impossible for the local authority to replicate exactly the national funding formula rates to schools for the following reasons:
  - The funding rates (PUF and SUF) have been determined using October 2016 census data, whereas actual allocations to schools use October 2017 census data. If pupil characteristics (such as deprivation levels) have changed between the two census dates, this will create a surplus or shortfall to be adjusted for.
  - The amount of funding being received for the business rates element of the formula is based on historical amounts, whereas the funding allocated to schools will need to be the actual 2018/19 amounts this is likely to be significantly more.
  - The amount of funding being received for growth and falling rolls funding is based on historical amounts. If the estimated requirement for 2018/19 is greater, this will need to be funded.
  - If there is a significant shortfall in high needs funding, up to 0.5% could be transferred from the schools block allocation.
- 4.7 Another report on this agenda gives further details of the proposals for the school formula.

#### 5. Central Schools Services Block

- 5.1 The Central Schools Services Block is derived from the centrally retained services that were previously funded from the Schools Block, e.g. admissions, licences, servicing of Schools' Forum, Education Welfare.
- 5.2 A new formula is in place to determine funding allocations to local authorities. This is a per pupil amount, 10% of which is allocated according to relative deprivation levels.
- 5.3 The baseline for this block has been determined as follows:
  - Total budget for these services in 2017/18
  - Less use of DSG funds in the schools block carried forward from 2016/17.
- 5.4 If the formula funding is less than the baseline, the minimum amount to be received will be the baseline less 2.5%.
- 5.5 The formula funding for West Berkshire is less than the baseline. Therefore the funding in 2018/19 will be less. However, the final allocation will depend on October 2017 pupil numbers, but at a rate of £44.22 per pupil the actual funding will not differ significantly from the current estimate.
- 5.6 The following table illustrates the impact:

2018/19 Baseline less 2.5%	£987,675
Less: 2017/18 Budget for central school services	£1,288,690
Possible shortfall	£301,015

5.7 Decisions will need to be taken in the Spring, on how this block can be balanced. One option will be to transfer DSG funding from the Early Years and High Needs block, on the basis that schools/pupils in these blocks benefit from the services in the Central Block. Transfers between these blocks are unlimited (subject to the Early Years pass through rate), but are subject to consultation with the Schools' Forum.

#### 6. Early Years Block

- 6.1 The new Early Years formula was introduced in 2017/18. Arrangements have not yet been published regarding 2018/19. It is therefore assumed that the funding rates will remain the same, despite our continued concern that the area cost adjustment for West Berkshire used for the three and four year old formula is too low. The factors used in the formula to determine the funding rates are due to be updated on a regular basis, but no indication has been given on how frequent this will be or when this will next take place.
- 6.2 The funding will, as always, be based on two consecutive years of January census data, and be finalised three months after the close of the financial year. The requirement to manage shortfalls or surpluses on an annual basis due to the mismatch between funding received based on the January census, and allocations to providers based on actual provision of nursery hours during the year, continues to be a challenge.
- 6.3 The impact of funding allocated for the additional 15 hours against actual take up will also need to be managed, as will allocations for pupil premium grant and the Disability Access Fund.
- 6.4 The fixed sum allocation for maintained nursery schools has been guaranteed until 2019/20, but there is no news yet on what will happen beyond this date.
- 6.5 The deficit in the early years block carried forward to 2017/18 is due to be repaid over three years (i.e. in 2019/20). It is hoped that the indicative funding rates given to providers earlier this year for 2018/19 can be honoured, but this will need to be reviewed in the light of current year expenditure compared to forecast funding, in order to keep the deficit under control. All providers will need to be on a single rate for 2019/20.
- 6.6 In 2018/19, 5% of funding can be set aside for centrally retained services, which can include services to support early year's children with high needs, and transfers to other funding blocks.
- 6.7 The following table provides a summary of the original assumption for 2018/19 when the budget for 2017/18 was set:

2018/19 estimated DSG	£10,244,930
Less deficit carried forward	-£260,190
Less expenditure based on 2016/17 hours of provision (plus additional 15 hours)	-£10,057,280
Planned Deficit	£72,540

This assumes there are no transfers of funding to the Central Schools Block.

#### 7. High Needs Block

- 7.1 A new formula has been introduced for allocating High Needs funding to local authorities in 2018/19.
- 7.2 The new formula uses a number of proxy factors (population, deprivation, low prior attainment, disability living allowance and children in bad health), but with 50% allocated on the basis of historical spend, and a basic entitlement for the number of places in special schools. Under this formula West Berkshire receive less than the current High Needs Block allocation. However, all local authorities will gain a minimum of 0.5% over their baseline.
- 7.3 Place numbers at special schools, and import/export adjustments will be excluded from the baseline, and will be an additional allocation, so that any year on year changes can be taken into account in the annual allocation.
- 7.4 The baseline for this block has been determined as follows:
  - Total high needs block allocation in 2017/18
  - Less the first £4,000 of resource unit place funding transferred to the Schools Block.
- 7.5 As West Berkshire is on the baseline, funding is calculated as follows:
  - Baseline +0.5%
  - Add pupil numbers (422 pupils x £4,209)
  - Add import/export adjustment (143 x £6,000)

This adjustment is to reflect that the DSG funding is based on resident population rather than where pupils go to school/college. If a local authority is receiving more pupils from other local authority areas than are being sent to other local authority areas, (and vice versa) a funding adjustment is made.

7.6 The pupil number element will be based on the October 2017 census, whereas the import/export adjustment will use the January 2018 census and February 2018 ILR

data – the final allocation being provided *after* the budget for 2018/19 is required to be set. An estimate will therefore need to be made.

7.7 The High Needs Block was in deficit at the end of 2016/17. In setting the 2017/18 budget it was agreed to repay the deficit over a three year period. Assuming there are no significant increases to the overall cost base, the impact of the new funding will be as follows:

	2018/19 budget assumed in March 2017	2018/19 budget taking into account the funding changes
2018/19 estimated DSG	£20,060,000	£19,635,300
Less expected overspend in 2017/18	-£583,980	-£486,870
Less 2018/19 budget (taking into account adjustment for resource unit budget)	-£19,551,920	-£19,017,240
Deficit/Surplus	£75,900 deficit	£131,190 surplus

This assumes there are no transfers of funding to the Central Schools Block.

- 7.8 As in previous years, a place funding review needs to take place, with a deadline of 17<sup>th</sup> November for submitting changes to ESFA .
- 7.9 If Autumn forecasts indicate a rise in costs (in both 17/18 and 18/19) that are over and above the current surplus being indicated, a savings strategy will be required. This will include any changes to the i-College PRU charging structure.

#### 8. Timetable for Setting the Budget

8.1 The timetable for setting all the elements of the DSG budget is set out below:

September to October 2017	Modelling of new primary & secondary school formula (once received national formula rates from ESFA)
26/28 September 2017	Leadership Forum briefing
October 2017	Key Council Members briefing/input to proposals
11 October 2017 (reports due 4 October 2017)	Heads Funding Group review school formula options and make recommendation to Schools' Forum.
17 October 2017	School Admin (finance staff) briefing
30 October 2017 (reports due 23 October 2017)	Schools' Forum to agree on formula to go out to consultation with schools.
1 – 20 November 2017 (14 working days)	Consultation with Schools
November	High needs initial budget proposals worked on by

	officers
	Early years initial budget proposals worked on by
	officers
28 November 2017	Heads Funding Group review consultation
(reports due 21 November	responses and make a recommendation.
2017)	Review high needs budget proposals.
5 December 2017	Corporate Board – draft formula proposal.
(reports due 28 November 2017)	(Ahead of Schools' Forum and final funding
2017)	allocation but next date of 19 December is too late for OB)
11 December 2017	Schools Forum consulted on school formula final
(reports due 4 December	proposals in principle (as prior to final funding).
2017)	To agree de-delegations and funding/criteria for
	additional funds. Need to consult and agree to
	any funding block transfers.
	Review central schools, high needs, and early
	years budget proposals
Mid December 2017	DSG funding allocations and APT containing
	census data for final formula due from DfE (last year DSG was received 20th December and APT
	was received 15th December).
Mid December 2017	Finalisation by officers of formula and the funding
	rates in light of actual DSG funding
21 December 2017	Operations Board – Final formula proposal based
(reports due 14 December 2017)	on final funding allocation
18 January 2018 (reports	Executive – Approval of School Formula
due 9 January 2018)	
19 January 2018	Deadline for submission of final School Formula APT to ESFA
10 January 2018 (reports	Heads Funding Group review budget proposals
due 3 January 2018)	for central schools, high needs, and early years
	in light of funding announcement.
22 January 2018 (reports	Schools' Forum review funding calculation and
due 15 January 2018)	budget proposals for central schools, high needs,
	and early years. Agree budget strategy and determine any further work.
23 January to 20	Finalisation by officers of central schools, high
February	needs, and early year's budget proposals.
27 February 2018	Heads Funding Group review final proposals and
(reports due 20 February 2018)	make recommendation to Schools' Forum.
28 February 2018	Statutory deadline for providing primary and
	secondary maintained schools with their funding
40 March 0040 (	allocation (in practice this is late January).
12 March 2018 (reports	Schools' Forum to agree final budgets.
due 5 March 2018)	

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## **Schools Funding Formula 2018/19**

Report being considered by:	Schools Forum		
On:	30/10/2017		
<b>Report Author:</b>	Claire White		
Item for:	Decision	By:	All Forum Members

#### 1. Purpose of the Report

1.1 To set out the requirements for setting the primary and secondary school funding formula for 2018/19 and to set out the funding proposal to go out to consultation with all schools.

#### 2. Recommendation(s)

- 2.1 Approve the following proposal for setting the school funding formula for 2018/19, to go out to consultation with schools:
  - Use the National Funding Formula rates for every formula factor, applying a funding cap on gains of 3% per pupil and minimum funding guarantee of 0%.
  - Apply to the Secretary of State for Education to increase the minimum funding guarantee up to 0.5% should more funding be available.
  - Scale every formula factor upwards or downwards in order to match the final funding allocation available for distribution to schools.
- 2.2 Approve the consultation document and timescale for the consultation.

Will the recommendation require the matter		
to be referred to the Council or the	Yes:	No: 🛛
Executive for final determination?		

#### 3. Introduction

- 3.1 The Government has made a number of announcements over the summer and produced a number of policy and operational documents alongside the outcomes of the consultation on school funding. These documents can be found on this webpage: <a href="https://www.gov.uk/government/policies/school-and-college-funding">https://www.gov.uk/government/policies/school-and-college-funding</a>
- 3.2 The funding arrangements for 2018/19 (including the introduction of the National Funding Formula for 2018/19) have been released by ESFA very late this year (the final piece of information needed in order to commence modelling was received early October). This gives limited time to review, model, and consult with all schools.
- 3.3 The biggest change following the consultation earlier this year is the announcement that nationally an additional £2.6billion is to go towards education funding over the next two years, rising to a total of £43.5 billion in 2019/20. Additional funding has been put into the National Funding Formula meaning that no school should lose on

a per pupil basis. For West Berkshire schools this is a significant improvement, as the previous proposal meant that around half of West Berkshire schools would have seen a reduction in funding.

- 3.4 Another paper on this agenda set out the changes to the DSG and how the schools block DSG will be calculated. For the next two years the National Funding Formula will operate as a "soft" system this means that the local authority will receive a total allocation and then allocate this out to schools according to a local formula, which is determined after consulting with all schools and the Schools' Forum.
- 3.5 The other paper also set out why it is impossible for local authorities to just replicate the National Funding Formula through its own local formula.

#### 4. Changes

- 4.1 The national formula assigns funding rates to each of the current formula factors. For some local authorities these will be uplifted by an area cost adjustment – for West Berkshire this is 1.0341.
- 4.2 In determining the pupil numbers and other pupil characteristics, the October census will continue to be used, but there is no longer a reception uplift applied (where pupils have deferred their place from September to January), and resource unit pupils are now included in the count (but the resource unit place funding is reduced from £10,000 to £6,000).
- 4.3 Table 1 sets out the national rates compared to West Berkshire's current rates.

#### Table 1: National Funding Formula Rates compared to West Berkshire Current rates

Factor	National Rate	WBC National Rate (with ACA)	Current WBC Rate
1.Basic Entitlement:			
Primary	£2,747	£2,841	£2,945
Secondary KS3	£3,863	£3,995	£4,372
Secondary KS4	£4,386	£4,536	£4,372
2.Deprivation:			
Primary current FSM	£440	£455	£0
Primary FSM Ever 6	£540	£558	£875
Primary IDACI Band F (0.2 – 0.25)	£200	£207	£40
Primary IDACI Band E (0.25 – 0.3)	£240	£248	£120
Primary IDACI Band D (0.3 – 0.4)	£360	£372	£240
Primary IDACI Band C (0.4 – 0.5)	£390	£403	£240
Primary IDACI Band B (0.5 – 0.6)	£420	£434	£240
Primary IDACI Band A (over 0.6)	£575	£595	£240
Secondary current FSM	£440	£455	£0
Secondary FSM Ever 6	£785	£812	£670
Secondary IDACI Band F	£290	£300	£60
Secondary IDACI Band E	£390	£403	£180
Secondary IDACI Band D	£515	£533	£360
Secondary IDACI Band C	£560	£579	£360
Secondary IDACI Band B	£600	£620	£360
Secondary IDACI Band A	£810	£838	£360
3.Prior Attainment:			
Primary	£1,050	£1,086	£284

Secondary	£1,550	£1,603	£1,125
4.English as an Additional			
Language:			
Primary EAL 3	£515	£532	£345
Secondary EAL 3	£1,385	£1,432	£345
5.Sparsity			
Primary	£25,000	£25,852	£0
Secondary	£65,000	£67,216	£100,000
6.Lump Sum:			
Primary	£110,000	£113,747	£122,800
Secondary	£110,000	£113,747	£122,800
7.Rates:			
Primary	17/18 estimate		
Secondary	17/18 estimate		

- 4.4 It can be seen that for West Berkshire schools there is a shift in funding from basic entitlement and lump sum funding to additional needs funding. Annex A of Appendix A shows for each school a breakdown per formula factor using the national funding formula rates. The schools that gain funding are generally those with the following characteristics:
  - High number of pupils from deprived backgrounds (particularly those on the IDACI bands).
  - High number of pupils with low prior attainment.
  - Small rural school meeting the sparsity criteria the pupils live more than two miles from their next nearest school.
- 4.5 The following explains why there is this shift for some factors:
  - West Berkshire is ranked one of the lowest in terms of deprivation, which
    was replicated in lower relative funding when the DSG was first put in place –
    the funding received did not recognise the needs of pupils which this new
    formula is now addressing.
  - When the current West Berkshire formula was set in 2013 it was a School Forum decision that the prior attainment factor for primary schools was not, on its own, a reasonable proxy factor for additional need, and so more funding was added to the AWPU and deprivation.
  - It has been a School Forum decision not to use the sparsity factor for primary schools, as most of our small schools fall just outside the criteria and it was felt unfair that just a few would gain and at the expense of the others.
- 4.6 The national formula delivers a minimum increase of 0.5% per pupil in the DSG being allocated to the local authority. For schools that gain, a funding cap of 3% per pupil has been set for 2018/19. These increase to 1% and 6% respectively in 2019/20.
- 4.7 There will be a minimum per pupil funding level of £3,300 for primary and £4,600 for secondary (this will go up in 2019/20 to £3,500 for primary and £4,800 for secondary). It is therefore possible to gain more than 3% per pupil, but all West

Berkshire schools will be on at least this level without this factor added. Note that this calculation is based on **all** formula funding including the lump sum, it is **not** the basic entitlement.

#### 5. Funding

5.1 Based on the October 2016 census data and pupil numbers, the schools block DSG would be £97.5m. Growth funding and increases in business rates would need to be deducted, with the balance available to allocate to schools. There is no intention to move funding from this block to any other block:

Schools block DSG	£97,518,000
Less Growth Funding	-£200,000
Less increase in Business Rates	-£200,000

#### Balance available to allocate £97,118,000

- 5.2 This figure could go up or down depending on the changes in pupil numbers in the October 2017 census.
- 5.3 The amount of funding required to allocate to schools using the national formula rates could also go up or down, not just in proportion to changes in pupil numbers, but if pupil characteristics used in other formula factors have significantly changed compared to October 2016 (because the funding being received does not recognise this change).
- 5.4 In addition to agreeing on the funding formula, a decision needs to be taken on how to allocate any surplus or shortfall, as the final funding will not be known until mid December and after the consultation with schools has taken place.

#### 6. **Proposals**

- 6.1 It remains a local authority decision (for at least the next two years) on how the funding is allocated to schools through the formula factors. There is no requirement to stick to the national funding formula rates, or to use all the factors.
- 6.2 Although it will be almost impossible to replicate the national funding formula as shown in the DfE tables for each school, it is proposed that in principle the aim will be to move as close as possible to the national rates, using all the formula factors, and using the highest minimum funding guarantee possible, and applying the 3% per pupil cap on gains. There is no advantage in doing anything different; this will give schools certainty in funding allocations in future years, the minimum funding guarantee will protect schools that lose, and schools that gain should receive this funding as soon as possible. All Heads Funding Group agreed on this principle.
- 6.3 This model (using 0% minimum funding guarantee) is shown in Annex C of Appendix A. The cost of this model is £96,972k. The impact is as follows:

	Primary	Secondary
No. of schools gaining nil	21	4
Gains £1k to £5k	9	0
Gains £5k to £15k	15	1
Gains £15k to £30k	16	0
Gains over £30k	5	5
Highest Gain	£39,628	£70,377
Average Gain	£10,634	£25,025

- 6.4 The minimum funding guarantee that can be set in the school formula is between 0% to -1.5%; if the local authority wishes to set a minimum funding guarantee of between 0% and +0.5%, an application needs to be made to the Secretary of State for Education, following a consultation with schools and subject to Schools' Forum approval. Heads Funding Group felt that due to current funding shortfalls in all schools, if funding was available, all schools should see an increase in the per pupil funding, no matter how small, and is proposing that this option be pursued.
- 6.5 If there is enough funding to allow a minimum funding guarantee of 0.5%, this is shown in Annex D of Appendix A. The cost of this model is £97,127k so could be affordable. The impact is as follows:

	Primary	Secondary
No. of schools gaining nil	0	0
Gains £1k to £5k	29	1
Gains £5k to £15k	16	1
Gains £15k to £30k	16	3
Gains over £30k	5	5
Highest Gain	£39,628	£86,720
Average Gain	£11,495	£34,828

6.6 Heads Funding Group also looked at a model which showed setting funding rates for each formula factor at half way between current rates and national formula rates. Interestingly, this was the least favourable for schools, showing that the national formula rates do benefit the majority of our schools.

- 6.7 Any surplus or shortfall in funding has to be allocated through the formula factors. Heads Funding Group looked at options for adding additional funding through the basic entitlement, lump sum, or increasing the cap on gains. There was no consensus as in each scenario certain groups of schools gained at the expense of others. The agreed proposal is that the funding rates for all formula factors be scaled upwards or downwards in order to match the final funding allocation. This is because:
  - It is fair and equitable for all schools no particular type of school is advantaged or disadvantaged.
  - It is logical the area cost adjustment is applied to every formula factor, so it makes sense to add or remove funding in the same way.
  - It keeps the funding for all factors in the same proportion to the national funding rates and thus in proportion to the relative needs of pupils in each school.
  - It will make setting of the 2019/20 formula more straightforward, rather than having to address any anomalies that may have arisen, and which could cost more in minimum funding guarantee in future years.

#### 7. Next Steps

- 7.1 A consultation document will go out to schools containing these proposals. The document is set out in Appendix A for approval.
- 7.2 The consultation will last for three weeks, and the results will be brought back to the next Heads Funding Group to review before determining a final proposal to take to the December meeting of the Schools' Forum for approval. The Council's Executive will make the final decision in January. The formula has to be submitted to ESFA by 19<sup>th</sup> January 2018.
- 7.3 The consultation will also ask schools their views on the criteria currently used for additional funds, and on de-delegations. Final proposals on these will also come back to Schools' Forum for final decision in December.

#### 8. Appendices

Appendix A – Primary and Secondary Schools Funding – Proposed Funding Arrangements for 2018/19: Briefing and Consultation Document for Schools



### Primary and Secondary Schools Funding Proposed Funding Arrangements for 2018/19

### Briefing & Consultation Document for Schools November 2017

#### 1. Introduction

- 1.1 The Department for Education (DfE) has held two consultations since March 2016, with the intention of reforming school funding and introducing a National Funding Formula (NFF). The premise is that all schools will be funded on the same basis and pupils with similar characteristics and similar needs will attract similar levels of funding regardless of where they live. This means that the funding rates for each of the current formula factors will be set nationally rather than by each individual local authority. In order to achieve this, funding would shift from higher funded local authorities to the lower funded ones.
- 1.2 Under the Government's proposals for a NFF set out in the second stage consultation earlier this year, West Berkshire overall did not gain additional funding, but funding moved between schools due to the national weightings of each factor being different to the West Berkshire rates. This meant just under half of West Berkshire schools gained funding, and just over half lost.
- 1.3 Various announcements have been made by the Secretary of State for Education over the summer. In September 2017, the outcomes of the second stage consultation were published alongside policy and operational documents relating to the 2018 schools budget, and the implementation of the NFF from April 2018. These can be accessed on this webpage:

https://www.gov.uk/government/publications/national-funding-formula-forschools-and-high-needs

- 1.4 Following numerous representations that there was not enough funding in the system, the Government is adding an additional £2.6 billion into education funding over the next two years, rising to a total of £43.5 billion in 2019/20. Additional funding is therefore being put into the NFF including protecting schools that were due to lose, so that no school should lose funding on a per pupil basis compared to their baseline.
- 1.5 For at least the next two years, the formula will operate as a "soft" formula. This means that the Government will allocate funding based on the NFF to each local authority, and the decision will be taken locally on how best to

allocate this funding to schools through the factors. A "hard" formula means that schools will receive their funding allocations direct from the Government using the NFF rates.

- 1.6 The method of distributing the funding will need to go out to consultation with all schools and be agreed by Schools' Forum in December, before being approved by the Council's Executive in January.
- 1.7 This document provides a briefing on the proposed local arrangement for 2018/19. Schools are invited to make comments on five specific areas, as highlighted in boxes within the text. Please e-mail your response to Claire White, Schools' Finance Manager <u>claire.white@westberks.gov.uk</u> by 20<sup>th</sup> November 2017. In order for the Schools' Forum to consider a suggestion for change, it should be accompanied by clear rationale on why your proposal is a better solution and fair and equitable for all schools in West Berkshire Council (WBC), and not just for your own individual school. You should also check that it falls within the current funding regulations.

#### 2. The National Funding Formula

- 2.1 The national formula assigns funding rates to each of the current formula factors. For some local authorities these are uplifted by an area cost adjustment. For West Berkshire this is 1.0341.
- 2.2 In determining the pupil numbers and other pupil characteristics, the October census will continue to be used, but there is no longer a reception uplift applied (where pupils have deferred their place from September to January), and resource unit pupils are now included in the count (though the resource unit place funding is reduced from £10,000 to £6,000).
- 2.3 Table 1 sets out the national rates compared to West Berkshire's current rates.

Factor	National Rate 2018/19	WBC National Rate (with ACA added)	Current WBC Rate 2017/18
1.Basic Entitlement:			
Primary	£2,747	£2,841	£2,945
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Secondary KS4	£4,386	£4,536	£4,372
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Primary current FSM	£440	£455	£0
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Primary IDACI Band F (0.2 – 0.25)	£200	£207	£40
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Primary IDACI Band D (0.3 – 0.4)	£360	£372	£240
Primary IDACI Band C (0.4 – 0.5)	£390	£403	£240
Primary IDACI Band B (0.5 – 0.6)	£420	£434	£240
Primary IDACI Band A (over 0.6)	£575	£595	£240
Secondary current FSM	£440	£455	£0

		1	
Secondary FSM Ever 6	£785	£812	£670
Secondary IDACI Band F	£290	£300	£60
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3.Prior Attainment:			
Primary	£1,050	£1,086	£284
Secondary	£1,550	£1,603	£1,125
4.English as an Additional Language:			
Primary EAL 3	£515	£532	£345
Secondary EAL 3	£1,385	£1,432	£345
5.Sparsity			
Primary	£25,000	£25,852	£0
Secondary	£65,000	£67,216	£100,000
6.Lump Sum:			
Primary	£110,000	£113,747	£122,800
Secondary	£110,000	£113,747	£122,800
7.Rates:			
Primary	17/18		17/18 actual
	estimate		
Secondary	17/18		17/18 actual
	estimate		

- 2.4 Note that the national rates have not been determined by an assessment of 'need' but by an assessment of the fairest weighting of funding between factors according to funding available.
- 2.5 It can be seen that for West Berkshire schools there is a shift in funding from basic entitlement and lump sum funding to additional needs funding. **Annex A** shows for each school a breakdown per formula factor using the national funding formula rates. The schools that gain funding are generally those with the following characteristics:
  - High number of pupils from deprived backgrounds (particularly those on the IDACI bands).
  - High number of pupils with low prior attainment.
  - Small rural school meeting the sparsity criteria the pupils live more than two miles from their next nearest school.

2.6 The following explains why there is this shift for some factors:

- West Berkshire is ranked one of the lowest in terms of deprivation, which was replicated in lower relative funding when the DSG was first put in place – the funding received did not recognise the needs of pupils which this new formula is now addressing.
- When the current West Berkshire formula was set in 2013 it was a School Forum decision that the prior attainment factor for primary

schools was not, on its own, a reasonable proxy factor for additional need, and so more funding was added to the AWPU and deprivation.

- It has been a School Forum decision not to use the sparsity factor for primary schools, as most of our small schools fall just outside the criteria and it was felt unfair that just a few would gain and at the expense of the others.
- 2.7 The national formula delivers a minimum increase of 0.5% per pupil in the DSG being allocated to the local authority. For schools that gain, a funding cap of 3% per pupil has been set for 2018/19. These increase to 1% and 6% respectively in 2019/20.
- 2.8 There will be a minimum per pupil funding level of £3,300 for primary and £4,600 for secondary (this will go up in 2019/20 to £3,500 for primary and £4,800 for secondary). It is therefore possible to gain more than 3% per pupil, but all West Berkshire schools will be on at least this level without this factor added. Note that this calculation is based on **all** formula funding including the lump sum, it is **not** the basic entitlement.

#### 3. Funding Available to be Allocated to Schools

- 3.1 Funding for schools is allocated to the local authority through the Dedicated Schools Grant (DSG). The grant is split into three funding blocks schools, early years, and high needs. From 2018/19 there will be a fourth block, central school services, which is for the centrally retained services previously funded from the schools block (such as licences, admissions, education welfare). Thus, from 2018/19 the schools block will only be for primary and secondary school formula allocations, plus growth funding for new or growing schools (as such pupils are not included in the funding allocation as they did not exist in the precious October census).
- 3.2 The schools block is not however ring fenced, and up to 0.5% can be transferred to other funding blocks subject to consultation with all schools and Schools' Forum agreement. Secretary of State approval is required for transfers above this limit or where the Schools' Forum has opposed the transfer
- 3.3 The schools block funding for 2018/19 is calculated as follows:
  - The national funding formula at the national rates is run for each school. This is based on October 2016 census data and pupil numbers.
  - An area cost adjustment (ACA) is added to the total sum for each school (1.0341 for West Berkshire).
  - Each school is allocated as a minimum a 0.5% per pupil increase against their baseline or a 3% per pupil funding cap against their baseline (the baseline is the 2017/18 formula allocation plus formula funding for the pupil numbers in resource units added back in).
  - For primary schools, the minimum per pupil funding level in 2018/19 is set at £3,300, and for secondary £4,600.

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- The allocations for every school in the local authority are added up and divided by the October 2016 pupil numbers. This produces a Primary Unit of Funding (£3,875 PUF) and a Secondary Unit of Funding (£4,925 SUF). These funding units are now set for 2018/19.
- In December 2017, the PUF and SUF will be multiplied by the October 2017 primary and secondary pupil numbers to produce the schools block DSG allocation.
- A sum for growth funding is added (equal to the 2017/18 local authority budget plus or minus carry forward from 2016/17), to give the final DSG total.
- 3.4 The local authority in consultation with the Schools' Forum will set aside funding required for the growth fund in 2018/19. The balance is then distributed to schools through the formula, by setting the formula funding rates and a minimum funding guarantee and funding cap on gains.
- 3.5 Overall, West Berkshire gains from the NFF by 1.3% or £1.3m, but the final allocation will be determined by the October 2017 census.
- 3.6 It will be impossible for the local authority to replicate exactly the national funding formula rates to schools for the following reasons:
  - The funding rates (PUF and SUF) have been determined using October 2016 census data, whereas actual allocations to schools use October 2017 census data. If pupil characteristics (such as deprivation levels) have changed between the two census dates, this will create a surplus or shortfall to be adjusted for.
  - The amount of funding being received for the business rates element of the formula is based on historical amounts, whereas the funding allocated to schools will need to be the actual 2018/19 amounts – this is likely to be significantly more.
  - The amount of funding being received for growth and falling rolls funding is based on historical amounts. If the estimated requirement for 2018/19 is greater, this will need to be funded.
  - If there is a significant shortfall in high needs funding, up to 0.5% could be transferred from the schools block allocation.
- 3.7 Based on the October 2016 census data and pupil numbers, the schools block DSG would be £97.5m. Growth funding and increases in business rates would need to be deducted, with the balance available to allocate to schools. There is no intention to move funding from this block to any other block:

Balance available to allocate	£97,118,000
Less increase in Business Rates	-£200,000
Less Growth Funding	-£200,000
Schools block DSG	£97,518,000

- 3.8 This figure could go up or down depending on the changes in pupil numbers in the October 2017 census.
- 3.9 The amount of funding required to allocate to schools using the national formula rates could also go up or down, not just in proportion to changes in pupil numbers, but if pupil characteristics used in other formula factors have significantly changed compared to October 2016 (because the funding being received does not recognise this change).
- 3.10 In addition to agreeing on the funding formula, a decision needs to be taken on how to allocate any surplus or shortfall. The final funding will not be known until mid December and after the consultation with schools has taken place.

#### 4. Proposal for 2018/19 Formula and Funding Rates

- 4.1 **Annex B** is an extract from the Government's school revenue funding operations guide, detailing the allowable funding factors for 2018/19. The main changes compared to 2017/18 are:
  - Removal of Reception Uplift in the national formula.
  - Use of Free School Meals factor *in addition to* Free School Meals Ever
     6.
  - Removal of Looked After Children factor in the national formula (not used by West Berkshire).
  - A funding floor added into the sparsity factor.
  - Mobility factor only available to those LAs currently using it.
- 4.2 It remains a local authority decision (for at least the next two years) on how the funding is allocated to schools through the formula factors. There is no requirement to stick to the national funding formula rates, or to use all the factors. However, it is the Government's intention that from 2020/21 all schools will be on the NFF.
- 4.3 Although it will be almost impossible to replicate exactly the national funding formula as shown in the DfE tables for each school, it is proposed that in principle the aim will be to move as close as possible to the national rates, using all the formula factors, and using the highest minimum funding guarantee possible and applying the 3% per pupil cap on gains. There is no advantage in doing anything different; this gives schools certainty in their funding allocations in future years, the minimum funding guarantee will protect schools that lose, and schools that gain should receive this funding as soon as possible. All Heads Funding Group agreed on this principle.
- 4.4 This model (using 0% minimum funding guarantee) is shown in **Annex C**. The cost of this model is £96,972k. The impact is as follows:

	Primary	Secondary
No. of schools gaining nil	21	4
Gains £1k to £5k	9	0
Gains £5k to £15k	15	1
Gains £15k to £30k	16	0
Gains over £30k	5	5
Highest Gain	£39,628	£70,377
Average Gain	£10,634	£25,025

- 4.5 The minimum funding guarantee that can be set in the school formula is between 0% to -1.5%; if the local authority wishes to set a minimum funding guarantee of between 0% and +0.5%, an application needs to be made to the Secretary of State for Education, following a consultation with schools and subject to Schools' Forum approval. Heads Funding Group felt that due to current funding shortfalls in all schools, if funding was available, all schools should see an increase in the per pupil funding, no matter how small, and is proposing that this option be pursued.
- 4.6 If there is enough funding to allow a minimum funding guarantee of 0.5%, this is shown in **Annex D**. The cost of this model is £97,127k so could be affordable. The impact is as follows:

	Primary	Secondary
No. of schools gaining nil	0	0
Gains £1k to £5k	29	1
Gains £5k to £15k	16	1
Gains £15k to £30k	16	3
Gains over £30k	5	5
Highest Gain	£39,628	£86,720
Average Gain	£11,495	£34,828

4.7 Heads Funding Group also looked at a model which showed setting funding rates for each formula factor at half way between current rates and national formula rates. Interestingly, this was the least favourable for schools, showing that the national formula rates do benefit the majority of our schools.

- 4.8 Any surplus or shortfall in funding has to be allocated through the formula factors. Heads Funding Group looked at options for adding additional funding through the basic entitlement, lump sum, or increasing the cap on gains. There was no consensus as in each scenario certain groups of schools gained at the expense of others. The agreed proposal is that the funding rates for all formula factors be scaled upwards or downwards in order to match the final funding allocation. This is because:
  - It is fair and equitable for all schools no particular type of school is advantaged or disadvantaged.
  - It is logical the area cost adjustment is applied to every formula factor, so it makes sense to add or remove funding in the same way.
  - It keeps the funding for all factors in the same proportion to the national funding rates and thus in proportion to the relative needs of pupils in each school.
  - It will make setting of the 2019/20 formula more straightforward, rather than having to address any anomalies that may have arisen, and which could cost more in minimum funding guarantee in future years.
- 4.9 The models assume no change in pupil numbers, and thus illustrate the impact of introducing the NFF. Actual individual school allocations will be dependent on the October 2017 census data. The model using 0% minimum funding guarantee (Annex C) is also available as a spreadsheet, and by entering the school cost centre in the orange box of the "school sheet" tab this will display in detail the formula allocation for the school alongside the current funding received for each factor. Schools can also enter their actual pupil numbers for October 2017 (yellow boxes) to see their likely funding for 2018/19 and beyond based on this model. The sheets do not include any high needs funding for individual pupils i.e. top ups, which is paid outside the formula, as top up funding is variable and follows the pupil.
  - Do you agree that West Berkshire should move straight to the national funding formula rates for every factor, applying a minimum funding guarantee of 0% and funding cap on gains of 3% (as shown in Table 1 and Annex C)? If not, please let us know with your reasons why.
  - 2. Do you agree that if there is additional funding available the minimum funding guarantee should be set between 0% and 0.5% according to affordability i.e. this will mean that every school will receive a minimum of up to 0.5% per pupil? If not, please let us know with your reasons why.
  - 3. Do you agree that any shortfall or surplus in funding is addressed by scaling all formula factors downwards or upwards? If not, please let us know with your reasons why.

#### 5. Additional Funding Outside the School Formula

5.1 The current funding regulations allow for a few exceptional circumstances to be funded outside the formula and be top sliced from the DSG. For each fund the Schools' Forum needs to agree the amount to set aside and clear criteria setting out the circumstances in which a payment could be made and the basis for calculating the sum to be paid. The current criteria for each fund can be accessed via the WBC school funding web page:

http://info.westberks.gov.uk/index.aspx?articleid=31483.

- 5.2 The funds are as follows:
  - Growth Fund support for schools required to provide extra places in order to meet basic need within the authority – including the cost of new schools opening.
  - Falling Rolls Fund to support good or outstanding schools with falling rolls where local planning data shows that the surplus places will be needed in the near future
  - Schools with a disproportionate number of high needs pupils which cannot be reflected adequately in their formula funding. This needs to be made through a formula.
- 5.3As funding for the Growth Fund and Falling Rolls fund is top sliced from the schools block DSG, this impacts on the funding available to allocate out to all schools through the formula.
- 5.4 Bearing this in mind, it is proposed that the Falling rolls Fund is no longer operated. This is because not many other local authorities make use of such a fund and payments are made based on an assumption of future pupil numbers which may or may not materialise. In four years just one school has qualified, yet the pupil numbers for this particular school are now no longer forecast to increase at the number assumed.
- 5.5No changes are proposed to the criteria for the Growth Fund and for schools with disproportionate number of high needs pupils. It is proposed that the funding set aside for the Growth Fund is based on a realistic assumption of need in 2018/19.

4. If you have any comments/suggestions on this proposal or the criteria set to access the other additional funds please provide details.

- 5.6 Note that schools may also receive funding from the following sources:
  - Early year's formula funding for two, three, and four year olds.
  - Sixth form funding (national formula).
  - High needs place and top up funding.
  - Pupil premium grant.
  - PE and sports grant.
  - Universal infant free school meal grant.

Information on each can be also be accessed via the WBC school funding web page.

#### 6. De-delegations 2018/19 (maintained schools only)

- 6.1 From 2013/14 schools received funding for newly delegated central services. For some services (where offered by the local authority), maintained primary and secondary schools can collectively opt for the service to be de-delegated – which means that the funding is deducted from the formula allocation and continues to be centrally retained for the benefit of all maintained primary and secondary schools, and individual schools cannot make that choice for themselves (Academies may be given the option to buy into the service, as can Nursery schools, Special schools and PRUs). From 2017/18, statutory services previously funded by the Education Services Grant were also added, and the de-delegation for these services relate to all maintained schools. The de-delegations need to be re-determined on an annual basis.
- 6.2 The relevant Schools' Forum representatives for each phase will vote on whether each service is to be de-delegated or not. The services currently de-delegated are as follows:
  - Behaviour Support Service
  - Support to underperforming ethnic minority groups and bilingual learners
  - Trade Union Local Representation
  - Contingency for schools in financial difficulty (primary schools only)
  - CLEAPSS
  - Statutory & Regulatory duties (health & safety, internal audit, statutory accounting, pensions administration)
- 6.3 Information about these services were included in a report to the Schools' Forum on 30<sup>th</sup> October 2017, agenda item 9, which can be viewed on this website:

http://decisionmaking.westberks.gov.uk/ieListMeetings.aspx?Cld=335&Year=0 The amounts to be deducted from each school for 2018/19 will be different to those shown in the report, as they will be based on the October 2017 census data (the current exemplification is based on the October 2016 census).

- 6.4 It is proposed to widen the criteria for primary schools to access the schools in financial difficulty fund. The proposal is for schools not in deficit but required to restructure to avoid going into deficit, to be eligible to apply for reimbursement of the one off redundancy cost. This will still be subject to the same application and scrutiny process. It is felt by Heads that those who forward plan their restructures and avoid going into deficit are then disadvantaged by not being able to access this fund
- 6.5 The final decision on each de-delegation will be made by the relevant Schools' Forum Members for each phase on 11<sup>th</sup> December 2017. Schools may wish to contact their Schools' Forum representative direct to express their view, or respond as part of this consultation.

5. If you do not agree with any of the above services being de-delegated, please let us know with your reasons why.

#### 7. Timetable

7.1 The timetable for determining the school formula and schools budgets for 2018/19 is as follows:

Schools' Forum to review the 2018/19	30 <sup>th</sup> October 2017
school formula arrangements and agree	
on a proposal.	1 <sup>st</sup> to 20 <sup>th</sup> November 2017
Briefing document to schools – with	1 <sup>st</sup> to 20 <sup>st</sup> November 2017
opportunity given to make comments on the proposals.	
Heads Funding Group to consider the	28 <sup>th</sup> November 2017
responses from schools and make a	
recommendation to Schools' Forum.	
Apply to Secretary of State to increase	By 30 <sup>th</sup> November 2017
MFG up to 0.5%	,
Schools' Forum to agree on the formula	11 <sup>th</sup> December 2017
and preferred funding rates to	
recommend to the Council. Vote taken on	
de-delegations and the criteria agreed for	
accessing the additional funds.	
October census data issued by the DfE	Mid December
and final DSG funding allocation for	
schools and high needs blocks received.	
Final school formula rates determined	
according to funding available.	Executive 19th January 2019
Formal Political approval received.	Executive 18 <sup>th</sup> January 2018
2018/19 formula submitted to Education & Skills Funding Agency.	19 <sup>th</sup> January 2018
Schools' Forum to consider the overall	22 <sup>nd</sup> January 2018
DSG position and remaining budgets for	
all funding blocks.	
Confirmation of final budget allocations to	By end of January 2018
maintained schools	(statutory deadline 28 <sup>th</sup> February 2018)
Schools' Forum to decide on the final	12 <sup>th</sup> March 2018
budget for all DSG funding blocks	

#### <u>Annexes</u>

Annex A – West Berkshire Schools - National Funding Formula Compared to Current WBC Formula - Funding per Factor

Annex B – Funding Factors 2018/19 – Extract from ESFA Operational Guide

Annex C – Proposed Formula 2018/19 - Exemplification for Individual Schools (also provided as separate spreadsheet for schools to see their own formula budget allocation detail and for their own modelling purposes)

Annex D – Formula Using 0.5% Minimum Funding Guarantee (preferred option if funding available)

## Annex A

## Funding Per Factor: NFF compared to WBC Formula (Prior to MFG & Cap)

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				AWPU		Dr				r Attainm		English	as an Ado	ditional	SUB TC	TAL - PUI	PIL LED							Rates	SUB 1	OTAL - CH	
Cost	SCHOOL	Pupil	2017/18	2018/19	Change	2017/18	2018/19	Change	2017/18	2018/19	Change	2017/18	2018/19	Change	2017/18	2018/19	Change	2017/18	2018/19	Change	2017/18	2018/19	Change	Funded at	2017/18	2018/19	Change
Centre		No's	Budget	NFF	In Funding	Budget		In Funding	Budget		In Funding	Budget	NFF	In Funding	Budget	NFF	In Funding	Budget	NFF	In Funding	Budget	NFF	In Funding	Cost	Budget	NFF	In Funding
		(Oct 2016)																-					1				
91000 Ald	dermaston Church of England Primary School sildon Church of England Primary School	185	544,825 421 135	525,502 406 199	-19,323	22,680	24,011 9,120	1,331 2,952	12,154	46,467 48,297	34,313 35.664	2,503	3,864	1,361	582,162 439,936	599,844 463,617	17,682 23,681	122,800	113,747	-9,053 -9,053	0	2,347	0 0 0 7 2,347	24,703 11,385	729,665 574,121	738,294 591,095	8,629
	edon Church of England Controlled Primary School	46	135,470	130,665	-4,805	9,660	7,530	-2,130	3,876	14,817	10,941	1,190	1,837	647	150,196	154,849	4,653	122,800	113,747	-9,053	0	2,041	0 0	2,228	275,224	270,824	-4,400
	enham Primary School ch Copse Primary School	82	241,490 1,248,680	232,925 1,204,394	-8,565 -44,286	12,955 30,161	12,999 27,946	44	5,665 24,508	21,657 93,695	15,992 69,187	1,147 2,418	1,770 3,732	623 1.314	261,257	269,351 1.329,768	8,094	122,800	113,747	-9,053	0	(	0 0	11,940 21,243	395,997	395,037	-959 14,948
91500 Bra	adfield Church of England Primary School	142	418,190	403,358	-14,832	19,575	16,032	-3,543	10,008	38,261	28,253	2,410	0	0	447,773	457,652	9.879	122,800	113,747	-9,053	0	(	0 0	1,694	572,267	573,092 426,519	826
	ghtwalton Church of England Aided Primary School impton Church of England Primary School	100	294,500 147,250	284,055 142,028	-10,445	4,248	4,531 7,803	283	5,847 3,905	22,354 14,929	16,507	0	0	0	304,595	310,940 164,760	6,345	122,800	113,747	-9,053	0	(	0 0	1,833	429,227		-2,70
	cklebury Church of England Primary School	129	379,905	366,431	-5,222	7,010	6,339	-1,732	11,222	42,902		0	0	0	160,690 398,137	415,672	17,535	122,800 122,800	113,747	-9,053	0	(	0 0	9,997	286,237 530,934	281,253 539,416	8,482
91900 Bu	rghfield St. Mary's Church of England Primary School	206	612,560 677,350	585,154 653.327	-27,406	14,880 45,480	15,309 54,143	429	9,558 13,399	36,188	26,631	1,631	2,493 13.954	862 4 914	638,629	639,144	515	122,800 122,800	113,747 113,747	-9,053	0	(	0 0	14,446	775,875	767,337	-8,53
92000 Ca 92100 Ca	Ilcot Infant School & Nursery Ilcot Junior School	230	821,655	792,514	-24,023	45,480	54,143 95,569	8,663 5,346	34,761	51,226 132,894	37,827 98,133	5,520	13,954	4,914 3,001	745,269 952,158	772,650	27,380 77,339	122,800	113,747	-9,053	0	(	0 0	23,234	1,098,192	902,502	18,32
95600 Ch	addleworth St. Andrew's Church of England Primary Sch ieveley Primary School	t 29	85,405 615,505	82,376 593,675	-3,029	13,125	12,016	-1,109	3,127	11,953	8,827	0	0 2 487	0	101,657	106,345 641,588	4,689	122,800	113,747	-9,053	0	(	0 0	2,799	227,256	222,891 782.615	-4,365
	Id Ash St. Mark's Church of England Primary School	209	580,165	593,675	-21,830	4,616	4,201	-415	8.765	41,225 33,508		1,611	2,487	220	596.006	641,588	9,073	122,800	113,747	-9,053	0	(	0 0	13,884	782,595	728,805	-3.88
92200 Co	mpton Church of England Primary School	185	544,825	525,502	-19,323	20,017	16,414	-3,603	13,198	50,456	37,258	0	0	0	578,039	592,372	14,333	122,800	113,747	-9,053	0	(	0 0	9,025	709,864	715,144	5,279
	midge Primary School wnsway Primary School	209	303,335 615,505	292,577 593,675	-10,758 -21,830	4,735	3,898 14,336	-837	3,835 14,944	14,662 57,131	10,827	1,615	2,493 2,487	878	313,520	313,631 667,629	21,966	122,800 122,800	113,747	-9,053	0	(	0 0	6,220	442,540 787,208	433,598 800,120	-8,94
92800 En	borne Church of England Primary School	65	191,425	184,636	-6,789	9,156	7,377	-1,779	7,720	29,513	21,793	0	0	0	208,300	221,526	13,226	122,800	113,747	-9,053	0	(	0 0	591	331,691	335,864	4,172
	glefield Church of England Primary School Ikland Primary School	98	288,610 1,325,250	278,374	-10,236	8,092	6,762	-1,329	4,344	16,608 93,442	12,264	3 176	4 903	1 727	1 367 539	301,745	23 997	122,800	113,747	-9,053	0		0 0	1,666	425,512	417,157	-8,35
93100 Fir	Tree Primary School & Nursery	191	568,385	542,546	-25,839	65,682	71,385	5,703	15,503	58,657	43,153	12,331	18,836	6,506	661,901	691,423	29,523	122,800	113,747	-9,053	0	Ċ	0 0	2,921	787,621	808,091	20,46
	ancis Baily Primary School Irland Junior School	541	1,599,135 639.065	1,536,739 616,400	-62,396 -22,665	52,106 44,775	53,463 53,459	1,357	39,302 14,323	149,703 54,760	110,401 40,437	5,580 2,415	8,582 3,728	3,002	1,696,123	1,748,487 728,347	52,364	122,800 122,800	113,747	-9,053 -9.053	0	(	0 0	33,769 14,440	1,852,692 837,818	1,896,002 856,534	43,310
93500 Ha	mpstead Norreys Church of England Primary School	88	259,160	249,969	-9,191	5,696	4,001	-1,694	5,621	21,491	15,870	0	0	0	270,477	275,461	4,984	122,800	113,747	-9,053	0	(	0 0	11,524	404,801	400,731	-4,069
93600 He	mitage Primary School ngerford Primary School	193	577,220 1.157.385	548,227 1.113,497	-28,993 -43,888	11,019 58.024	8,632 56,499	-2,386	14,685 31,176	55,284 118,885	40,599 87,709	2,013 5,616	3,059 8,647	1,046	604,936 1,252,200	615,202	10,265 45,327	122,800	113,747 113,747	-9,053	0	(	0 0	20,387 35,500	748,123	749,335	1,212
92700 The	e IIsleys' Primary School	57	170,810	161,911	-8,899	3,030	1,900	-1,130	2,300	8,640	6,340	0	0	0	176,139	172,452	-3,688	122,800	113,747	-9,053	0	25,852	2 25,852	3,369	302,308	315,419	36,273
93800 Ink	pen Primary School	76	223,820 765,700	215,882 738,544	-7,938	7,189	5,043 18,713	-2,146 1,597	6,165 23,157	23,571 88,531	17,405	359 14,950	554 23,077	195 8,127	237,534 820,923	245,050 868.865	7,516	122,800	113,747	-9,053 -9.053	0	(	0 0	2,747	363,081 959,362	361,544	-1,537 38,889
93900 Jor 94000 Jor	hn Rankin Infant & Nursery School hn Rankin Junior School	260	824,600	738,544	-27,156	30,857	30,317	-540	23,157	90,984	67,186	3,116	4,810	1,694	820,923	921,466	39,094	122,800	113,747	-9,053	0	(	0 0	15,640	1,025,077	998,251 1,055,117	38,885
	nnet Valley Primary School	194	571,330 412,300	551,067 397,677	-20,263	47,527 15,393	46,070 12,460	-1,457	18,047 7,295	68,994 27,891	50,947 20,596	5,416 443	8,361	2,944	642,320	674,491 438,713	32,172 3,282	122,800 122,800	113,747 113,747	-9,053	0	(	0 0	14,023 14,301	779,143 572,532	802,261 566,761	23,118
	htbury St. Mary's Church of England Primary School mbourn Church of England Primary School	140	412,300	397,677	-14,623	41,001	12,460	-2,932	21.104	27,891 80,683		443	7,131	241	435,431 643,945	438,713	3,282	122,800	113,747	-9,053	0	(	0 0	27,206	793.951	839,905	45,955
94400 Loi	ng Lane Primary School	208	612,560	590,835	-21,725	15,456	14,752	-704	11,123	42,525	31,402	1,209	1,867	657	640,348	649,979	9,631	122,800	113,747	-9,053	0	(	0 0	15,550	778,698	779,275	577
	ortimer St. Johns Church of England Infant School ortimer St. Mary's Church of England Junior School	216	535,990 636,120	514,140 613,559	-21,850	5,086 25,706	9,803 23,133	4,717	9,990 13,632	37,983 52,117	27,993 38,485	1,047	1,606 2,130	560 750	552,113 676,838	563,533 690,940	11,420	122,800	113,747	-9,053 -9.053	0	(	0 0	9,997	684,910 802,498	687,276 807,546	2,367
94500 Mrs	s. Bland's Infant & Nursery School	169	500,650	480,053	-20,597	31,008	40,196	9,188	13,411	50,971	37,559	3,666	5,625	1,959	548,735	576,845	28,110	122,800	113,747	-9,053	0	(	0 0	11,663	683,198	702,255	19,057
	Ingbourne Primary School	205	603,725 639.065	582,313 616,400	-21,412	20,691 19,318	22,343 19,174	1,652 -145	12,889 17,073	49,276 65,270	36,387 48,198	3,233 4,492	4,991 6,934	1,758 2,442	640,538 679,948	658,922 707,778	18,384 27,830	122,800	113,747 113,747	-9,053	0	(	0 0	22,104	785,442 817,188	794,773 835,964	9,331
	rsons Down Junior School	308	907,060	874,890	-32,170	46,559	44,339	-2,220	26,000	99,399	73,400	690	1,065	375	980,308	1,019,694	39,385	122,800	113,747	-9,053	0	(	0 0	24,939	1,128,047	1,158,379	30,332 5,324
94900 Pu 95000 Ro	rley Church of England Primary School bert Sandilands Primary School & Nursery	246	329,840 736,250	318,142 698,776	-11,698	12,730 51,611	13,927 58,984	1,197 7,373	8,429 21,789	32,224 81,969	23,796 60,180	1,992 8,385	3,074 12,737	1,083 4,351	352,991 818.036	367,368 852,465	14,377 34,430	122,800	113,747	-9,053	0	(	0 0	10,485 16,245	486,276 957.081	491,599 982,457	5,324
95100 Sh	aw-cum-Donnington Church of England Primary School	94	279,775	267,012	-12,763	14,442	14,907	465	7,147	27,037	19,889	1,214	1,854	640	302,578	310,810	8,231	122,800	113,747	-9,053	0	(	0 0	5,079	430,457	429,635	-822
	efford Church of England Primary School eenhamland Primary School	29	85,405 860,863	82,376 826,601	-3,029	5,075 64,279	4,604 66,919	-471 2,640	2,601 24,806	9,943 98,209	7,342	0 19,620	0 31,363	0	93,081 969,567	96,923	3,842 53,525	122,800	113,747	-9,053	0	25,852	2 25,852	4,043	219,924	240,564 1,140,032	20,640
95400 Sp	ringfield Primary School	301	886,445	855,006	-31,439	27,075	28,014	939	19,577	74,845	55,268	6,038	9,319	3,282	939,134	967,184	28,050	122,800	113,747	-9,053	ő	Ċ	o o	17,911	1,079,845	1,098,842	18,997
95500 Sp 95700 St	urcroft Primary School Finian's Catholic Primary School	433	1,275,185	1,229,959	-45,226	57,993 10,616	51,522 11,956	-6,472 1,340	34,518 18,734	131,964 71,624	97,447	5,394 2,442	8,327	2,932	1,373,090	1,421,772	48,682	122,800	113,747	-9,053 -9,053	0	(	0 0	60,305	1,556,195	1,595,824 762,712	39,628
	John the Evangelist Infant & Nursery School	180	530,100	511,299	-18,801	9,159	9,483	324	11,697	44,719	33,022	7,763	11,982	4,220	558,718	577,483	18,765	122,800	113,747	-9,053	0	(	0 0	2,971	684,490	694,201	9,711
	Joseph's Catholic Primary School Nicolas Church of England Junior School	210	618,450 759,810	596,516 732,863	-21,934	21,404	28,580	7,176	19,698 16,492	75,308	55,610 46,558	18,918	29,201	10,283	678,470 810,950	729,604	51,135 20.039	122,800	113,747	-9,053	0	(	0 0	3,193	804,463	<u>846,544</u> 951,106	42,081
96100 St.	Pauls Catholic Primary School	325	957,125	923,180	-33,945	27,116	36,448	9,332	27,794	106,260	78,466	6,384	9,855	3,471	1,018,419	1,075,742	57,322	122,800	113,747	-9,053	0	(	0 0	3,443	1,144,663	1,192,932	48,269
	ockcross Church of England Primary School eatley Church of England Voluntary Controlled Primary S	101	297,445 291,555	286,896 278,374	-10,549 -13,181	2,145 8,294	2,339 7,969	194	5,026 5,995	19,216 22,688	14,190 16.693	820 1,220	1,266 1,864	446 644	305,437	309,716 310.895	4,280	122,800	113,747 113,747	-9,053 -9.053	0	(	0 0	757 6.803	428,993 436.667	424,220 431,445	-4,774
96500 Su	Ihamstead and Ufton Nervet Church of England Voluntan	n 101	297,445	286,896	-10,549	6,405	7,176	771	6,741	25,773	19,031	0	0	0	310,591	319,845	9,253	122,800	113,747	-9,053	0	(	0 0	1,244	434,635	434,835	200
99700 The	atcham Park Church of England Primary School eale Church of England Primary School	385	1,133,825 841.092	1,093,613 809,557	-40,212 -31,535	75,196 29.648	80,935 28,057	5,739	30,513 12,609	116,656 49,960	86,143 37,351	6,401 6,325	9,881 10,118	3,480 3,793	1,245,936 889,675	1,301,085 897,693	55,149 8.018	122,800	113,747	-9,053 -9.053	0	(	0 0	14,995 14 440	1,383,731 1.026,915	1,429,826 1,025,879	46,096
96700 We	alford and Wickham Church of England Primary School	94	276,830	267,012	-9,818	7,014	7,476	462	5,603	21,420	15,817	0	0	0	289,447	295,909	6,462	122,800	113,747	-9,053	0	19,259	9 19,259	5,970	418,217	434,884	16,667
96800 We	estwood Farm Infant School estwood Farm Junior School	177	522,340 660,656	502,778 636,284	-19,562 -24,372	17,435 28,299	23,513 28,753	6,078 454	11,672 11,756	45,919 45,971	34,247 34,215	3,069	4,876 4,260	1,806	554,516 703,410	577,085 715,268	22,569 11,858	122,800 122,800	113,747 113,747	-9,053	0	(	0 0	11,107	688,423 840,372	701,939 843,177	13,516
97000 WH	nitelands Park Primary School	316	936,510	897,615	-24,372	69,903	63,603	-6,300	27,178	103,250	76,073	4,048	6,210	2,161	1,037,639	1,070,678	33,039	122,800	113,747	-9,053	0	(	0 0	5,519	1,165,957	1,189,943	23,986
98700 The	e Willows Primary School e Winchcombe School	344	1,013,080	977,150 1,150,424	-35,930	114,016 67,818	130,960 68,961	16,944 1,143	38,213 30,596	146,091 121,159	107,879 90,563	16,715 19,699	25,802 31,496	9,086 11,797	1,182,024	1,280,003	97,979 47,845	122,800 122,800	113,747 113,747	-9,053	0	(	0 0	26,635 32,361	1,331,459 1,479,356	1,420,385	88,926
97300 Wo	polhampton Church of England Primary School	405	270,940	261,331	-55,656	3,500	2,689	-811	5,173	19,777	14,604	19,099	31,490	0	279,613	283,797	4,184	122,800	113,747	-9,053	0	(	0 0	1,305	403,718	398,848	-4,870
97400 Yat	ttendon Church of England Primary School	73	214,985 4.017.868	207,360 3.855.695	-7,625	2,859 151,751	5,280 248,973	2,420 97,222	6,821 231,517	26,077 329,843	19,256 98,326	0	0 10,025	0 7.610	224,665 4,403,551	238,717 4,444,537	14,052	122,800 122,800	113,747 113,747	-9,053	0	25,852	2 25,852	1,348 34.665	348,813 4,561,016	379,663 4,592,948	30,850
	e Downs School	898	3,926,056	3,780,473	-102,173	57,238	82,086	24,848	132,595	188,909	56,314	1,035	4,297	3,262	4,116,923	4,055,763	40,986 -61,160	122,800	113,747	-9,053	0	(	0 0	25,626	4,265,350	4,195,136	31,932 -70,213
	hn O'Gaunt Community Technology College	336	1,468,992 6.092,558	1,411,300	-57,692	2,040 171.045	53,264	51,224	118,258	168,482	50,225	2,070	8,593	6,523	1,591,360		50,281	122,800	113,747 113,747	-9,053	100,000	59,148	8 -40,852	14,483	1,828,643	1,829,018	375
99100 Ke 99200 Litt	Innet School tle Heath School	1,391	6,092,558 5,600,532	5,396,271	-245,022 -204,261	213,646	283,068 367,123	112,023 153,477	346,200 228,317	503,706 325,284	157,506 96,967	4,391 2,764	18,618 11,475	14,227 8,711	6,614,194 6,045,259	6,652,928 6,100,154	38,734 54,895	122,800 122,800	113,747	-9,053	0	(	0 0	18,720 43,589	6,211,648	6,785,395 6,257,490	29,68
	rk House School	793	3,466,996	3,309,687	-157,309	116,705	177,253	60,548 53,644	201,503	287,082	85,579	7,254	30,114	22,859	3,792,458	3,804,137	11,678	122,800	113,747	-9,053	0	(	0 0	8,761	3,924,019	3,926,644	2,625
99500 The	Bartholomew's School eale Green Community School	1,264	5,526,208	5,315,386 2,336,055	-210,822	97,974	151,618 172,164	53,644 70,973	212,021 120,284	302,068 175,759		7,256	30,123 7,174	22,867 5,490	5,843,460 2,637,948	2,691,153	-44,264 53,205	122,800	113,747	-9,053	0	(	0 0	142,936 23,825	6,109,196 2,784,573	6,055,878 2,828,725	-53,311 44,15
99900 Tri	nity School & Performing Arts College	779	3,427,746	3,252,146	-175,600	155,927	260,536	104,608	253,132	380,193	127,061	7,210	31,508	24,298	3,844,016	3,924,382	80,366	122,800	113,747	-9,053	0	Ċ	0 0	30,918	3,997,734	4,069,046	71,31
99600 The	e Willink School	862	3,768,664	3,619,370	-149,294	82,984	143,909	60,925	130,708	186,220	55,512	1,727	7,169	5,442	3,984,082	3,956,668	-27,415	122,800	113,747	-9,053	0	(	0	100,884	4,207,766	4,171,298	-36,46
	RIMARY TOTAL	13,261	39,136,533	37,668,566	-1,467,967	1,694,004	1,768,942	74,938	976,463	3,738,913		248,763	386,095	137,331		43,562,516		8,104,800	7,507,276	-597,524	0	99,161		828,886	50,989,449		1,008,38
	CONDARY TOTAL	9,074		38,123,921 75,792,487		1,150,501 2.844,505	1,939,995	789,493 864,432	1,974,534	2,847,545 6.586.458		37,808 286,571	159,096 545,191			43,070,557 86.633.073		1,228,000 9.332,800	1,137,466 8,644,742	-90,534 -688.058	100,000			444,407		44,711,579 96,709,417	65,920
		,000					.,		.,,	,,	.,, /02		2.2,201		.,,		.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	-,,	,	,	,	,000		.,			.,,
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## Annex B

Funding Factors 2018/19 - Extract	
Funding Factor	Description and further information
1. Basic entitlement	This factor assigns funding on the basis of
A compulsory factor	individual pupils, with the number of pupils
	for each school or academy based on the
	October pupil census.
	□ funding is allocated according to an age-
	weighted pupil unit (AWPU)
	□ there is a single rate for primary age
	pupils, which must be at least £2,000
	□ there can be different rates for KS3 and
	KS4, with a minimum of £3,000 for each
	local authorities can choose to increase
	the pupil number count for schools with
	higher reception pupil numbers in January
	2017 than the October 2016 census
	we'll not include reception uplift in the
	national funding formula; local authorities
	currently using a reception uplift factor
	should consider whether to do so in 2018 to
	2019
	□ schools with reception uplift will not be
	financially disadvantaged in the national
	funding formula calculations, as the funding
	will remain in their baselines
2 Deprivation	Loopl outborition can use free acheel meete
2. Deprivation	Local authorities can use free school meals
A compulsory factor	(FSM), the income deprivation affecting
	children index (IDACI), or both to calculate the deprivation factor.
	We measure eligibility for current FSM using
	the previous October census, and Ever6
	FSM (pupils entitled to free meals at any
	time in the last 6 years) from the previous
	January census
	□ local authorities using FSM to calculate
	deprivation can choose to use either current
	FSM, Ever6 FSM, or both
	□ the IDACI measure uses 6 bands, and
	different values can be attached to each
	band; different unit values can be used for
	primary and secondary within each band
	we'll automatically set the FSM Ever6 ratio
	equal to the current FSM ratio for schools
	where the FSM Ever6 rate is recorded as
	lower than the current FSM rate
3. Prior attainment	The prior attainment factor acts as a proxy
An optional factor (used by most local	indicator for low level, high incidence, special
authorities)	educational needs.
	we'll confirm a separate weighting for new
	year 7 pupils later in the year

	We've included more information in the prior attainment section of this guidance
4. Looked-after children (LAC) An optional factor	Local authorities can apply a single unit value for any child who has been looked after for one day or more, as recorded on the LA SSDA903 return at 31 March 2017. we map this data to schools using the January school census, to identify the number of LAC in each school or academy we've increased the pupil premium plus rates for 2018 to 2019 from £1900 to £2300 we've not used a LAC factor in the national funding formula; local authorities currently using this factor should consider whether to do so in 2018 to 2019
5. English as an additional language (EAL) An optional factor	<ul> <li>Pupils identified in the October census with a first language other than English may attract funding for up to three years after they enter the statutory school system.</li> <li>□ local authorities can choose to use indicators based on one, two, or three years, and there can be separate unit values for primary and secondary</li> </ul>
<b>6. Pupil mobility</b> An optional factor	<ul> <li>This measure counts pupils who entered a school during the last three academic years, but did not start in August or September (or January for reception pupils).</li> <li>□ there is a 10% threshold, and funding is allocated based on the proportion above the threshold (for example, a school with 12% mobility, will attract pupil mobility funding for 2% of pupils)</li> </ul>
7. Sparsity An optional factor	<ul> <li>Schools that are eligible for sparsity funding must meet two criteria:</li> <li>they are located in areas where pupils would have to travel a significant distance to an alternative should the school close</li> <li>they are small schools</li> <li>We've included more information in the sparsity section of this guidance.</li> </ul>
<b>8. Lump sum</b> An optional factor (used by all local authorities)	Local authorities can set a flat lump sum for all phases, or differentiate the sums for primary and secondary. □ local authorities should give middle schools a weighted average, based on the number of year groups in each phase □ the maximum lump sum is £175,000, even for schools that receive London fringe uplift

	We've included more information in the lump sum section of this guidance, including information for amalgamated schools.
9. Split sites An optional factor	<ul> <li>The purpose of this factor is to support schools that have unavoidable extra costs because the school buildings are on separate sites.</li> <li>□ allocations must be based on objective criteria for the definition of a split site, and for how much is paid</li> <li>We've included more information in the split sites section of this guidance</li> </ul>
<b>10. Rates</b> An optional factor (used by all local authorities)	Local authorities must fund rates at their estimate of the actual cost. □ local authorities can make adjustments to rates during the financial year, but this must be done outside of the funding formula □ for example, an additional allocation could be made to a school (funded by balances brought forward) □ this should be reflected in the Section 251 outturn statement, and in each school's accounts □ the effect on the school would be zero, since any rates adjustment will be offset by a change in the cost of the rates
<b>11. Private finance initiative (PFI)</b> <b>contracts</b> An optional factor	The purpose of this factor is to support schools that have unavoidable extra premises costs (because they are a PFI school), and to cover situations where the PFI 'affordability gap' is delegated and paid back to the local authority. We've included more information in the PFI section of this guidance.
<b>12. London fringe</b> An optional factor, applicable only for five local authorities (Buckinghamshire, Essex, Hertfordshire, Kent, and West Sussex)	<ul> <li>The purpose of this factor is to support schools that have to pay higher teacher salaries because they are in the London fringe area, and only part of the local authority is in this area.</li> <li>□ This factor is applied as a multiplier of 1.0156 to the 6 pupil-led factors, the lump sum factor, and the sparsity factor</li> <li>We've provided details of these calculations in the technical specification for the schools block dataset.</li> </ul>
<b>13. Exceptional premises factors</b> An optional factor	Local authorities can apply to ESFA to use exceptional factors relating to school premises (for example, for rents, or joint-use

	<ul> <li>sports facilities).</li> <li>exceptional factors must relate to premises costs</li> <li>local authorities should only submit applications where the value of the factor is more than 1% of a school's budget, and applies to fewer than 5% of the schools in the authority's area</li> <li>local authorities can use exceptional premises factors used in 2017 to 2018 (for pre-existing, and newly-qualifying schools) in 2018 to 2019, if the qualification criteria are still met</li> </ul>
14. Minimum level of per pupil funding for secondary schools         An optional factor	The purpose of this factor is to allow local authorities to provide amounts up to the minimum per pupil funding levels for primary and secondary schools.  The formula will provide local authorities with per-pupil funding of at least £3,500 for primary schools and £4,800 for secondary schools with pupils in years 10 and 11 in 2019 to 2020 The formula will provide a transitional minimum amount of per pupil funding of at least £3,300 for primary schools in 2018 to 2019, as a step towards the £3,500 and £4,800 in 2019 to 2020. Where local authorities choose to use this factor, any capping and scaling cannot take the school below the minimum value set in the local formula Local authorities should calculate the minimum per pupil level on the basis of the school's total funding. This will be set out in the APT guidance. Local authorities who wish to reflect the NFF calculation by excluding premises factors that have been excluded from the NFF calculation should submit a disapplication request to agree this change. We've included more information on the setting a minimum per pupil amount for schools section of this guidance.

## Annex C

### Proposed Formula Exemplification 2018/19 At 0% MFG

		2017/	18 ACTUA		ATION	2018/19 E			Change	MEOU	CAD	AINO	Total		
			(includir Formula				ior to MF		Prior to		CAP on G		Funding	Overall Ch Including	
Cost Centre	SCHOOL	Formula Budget	add adjustments	Pupil No's (Oct 2016)	Per Pupil Funding	Formula Budget	Pupil No's (Oct 2016)	Per Pupil Funding	Transition Adjs	MFG 0.00%	CAP 3%	TOTAL	2018/19	Transition <sup>9</sup> Funding	% Pupil No's
	Aldermaston Church of England Primary School	729,665	729,665	185	3,944.14	738,294	185	3,990.78	8,629	0	0	0	738,294		1.2% 0
91100 91300	Basildon Church of England Primary School Beedon Church of England Controlled Primary School	574,121 283,256	574,121 283,256	143 46	4,014.83	591,095 270.824	143 46	4,133.53 5.887.48	16,974 -12,432	0 12.432	-3,575 0	-3,575 12,432	587,520 283,256		2.3% 0
	Beenham Primary School	395,997	395,997	82	4,829.23	395,037	82	4,817.53	-959	959	0	959	395,997		0.0% 0
91200 91500	Birch Copse Primary School Bradfield Church of England Primary School	1,449,809 573,436	1,449,809 573,436	424 142	3,419.36 4.038.28	1,464,757 573.092	424	3,454.62 4.035.86	14,948 -344	0 344	0	344	1,464,757 573,436		1.0% 0 0.0% 0
	Brightwalton Church of England Aided Primary School	429,227	429,227	100	4,292.27	426,519	100	4,265.19	-2,708	2,708	0	2,708	429,227		0.0% 0
91700 91800	Brimpton Church of England Primary School Bucklebury Church of England Primary School	300,320 530,934	300,320 530,934	50 129	6,006.39 4,115.77	281,253 539,416	50 129	5,625.06 4,181.52	-19,067 8,482	19,067 0	0	19,067 0	300,320 539,416		0.0% 0
91900	Burghfield St. Mary's Church of England Primary School	775,875	775,875 914,479	206 230	3,766.38 3.976.00	767,337	206 230	3,724.94	-8,538 -11,977	8,538	0	8,538	775,875		0.0% 0
92000 92100	Calcot Infant School & Nursery Calcot Junior School	1,098,192	1,098,192	230	3,976.00	902,502	230	3,923.92 4,180.92	-11,977 68,286	11,977 0	-39,449	11,977 -39,449	1,127,028	28,836 2	2.6% 0
95600 92400	Chaddleworth St. Andrew's Church of England Primary Sch	227,955 782,595	227,955 782,595	29 209	7,860.53	222,891 782,615	29 209	7,685.89	-5,065 19	5,065 0	0	5,065	227,955 782,615		0.0% 0
92400	Chieveley Primary School Cold Ash St. Mark's Church of England Primary School	732,690	732,690	209	3,744.46	782,615	197	3,699.52	-3,886	3,886	0	3,886	732,690		0.0% 0
92200	Compton Church of England Primary School	709,864 442,540	709,864 442,540	185 103	3,837.10 4,296.51	715,144 433,598	185 103	3,865.64 4,209.69	5,279	0 8,943	0	0 8,943	715,144 442,540		0.7% 0 0.0% 0
92300 92500	Curridge Primary School Downsway Primary School	787,208	787,208	209	3,766.54	800,120	209	3,828.33	-8,943 12,912	8,943	0	8,943	800,120	12,912 1	1.6% 0
92800	Enborne Church of England Primary School	331,691	331,691	65	5,102.94	335,864	65	5,167.13	4,172	0	0	0	335,864	4,172 1	1.3% 0
92900 93000	Englefield Church of England Primary School Falkland Primary School	425,512 1,508,264	425,512 1,508,264	98 450	4,341.96 3,351.70	417,157 1,523,207	98 450	4,256.71 3,384.90	-8,354 14,944	8,354 0	0	8,354 0	425,512 1,523,207		0.0% 0
93100	Fir Tree Primary School & Nursery	804,033	804,033	191	4,209.60	808,091	191	4,230.84	4,057	0	0	0	808,091	4,057 0	0.5% 0
93200 93400	Francis Baily Primary School Garland Junior School	1,876,252 837,818	1,876,252 837,818	541 217	3,468.12 3,860.91	1,896,002 856,534	541 217	3,504.63 3.947.16	19,750 18,715	0	0	0	1,896,002 856,534		1.1% 0 2.2% 0
93500	Hampstead Norreys Church of England Primary School	404,801	404,801	88	4,600.01	400,731	88	4,553.77	-4,069	4,069	0	4,069	404,801	0 0	0.0%
93600 93700	Hermitage Primary School Hungerford Primary School	748,123	748,123	193 392	3,876.29 3,598.22	749,335 1,446,774	193 392	3,882.57 3.690.75	1,212 36,273	0	0	0	749,335 1,446,774		0.2% 0 2.6% 0
92700	The Isleys' Primary School	302,308	302,308	57	5,303.66	315,419	57	5,533.66	13,110	0	-8,330	-8,330	307,089	4,780 1	1.6% 0
93800 93900	Inkpen Primary School John Rankin Infant & Nursery School	363,081 959,362	363,081 959,362	76 260	4,777.38 3,689.86	361,544 998,251	76 260	4,757.15 3,839.43	-1,537 38,889	1,537 0	0 -13,989	1,537 -13,989	363,081 984,262		0.0% 0 2.6% 0
94000	John Rankin Junior School	1,025,077	1,025,077	280	3,660.99	1,055,117	280	3,768.28	30,041	0	-3,298	-3,298	1,051,820	26,743 2	2.6% 0
94100 94200	Kennet Valley Primary School	779,143 590,929	779,143 590,929	194 140	4,016.20 4,220.92	802,261 566,761	194 140	4,135.37 4.048.29	23,118 -24 168	0 24.168	-3,577 0	-3,577 24,168	798,684 590,929		2.5% 0
94200	Kintbury St. Mary's Church of England Primary School Lambourn Church of England Primary School	793,951	793,951	140	4,220.92	839,905	140	4,046.29	45,955	24,100	-26,365	-26,365	813,541		2.5% 0
94400	Long Lane Primary School	778,698	778,698	208 181	3,743.74	779,275	208 181	3,746.52 3,797.11	577	0 5.269	0	0	779,275 692,545		0.1% 0 0.0% 0
95800 97500	Mortimer St. Johns Church of England Infant School Mortimer St. Mary's Church of England Junior School	692,545 802,498	692,545 802,498	216	3,826.22 3,715.27	807,276	216	3,797.11	-5,269 5,048	5,269	0	5,269 0	692,545		0.0% 0 0.6% 0
94500 94600	Mrs. Bland's Infant & Nursery School	683,198	683,198	169 205	4,042.59	702,255	169	4,155.35	19,057	0	-2,323 0	-2,323	699,932 794,773		2.4% 0
	Pangbourne Primary School Parsons Down Infant School	785,442 818,920	785,442 818,920	205	3,831.43 3,773.83	794,773 835,964	205 217	3,876.94 3,852.37	9,331 17,044	0	0	0	794,773 835,964		1.2% 0 2.1% 0
94800	Parsons Down Junior School	1,128,047	1,128,047	308	3,662.49	1,158,379	308	3,760.97	30,332	0	-651	-651	1,157,728	29,681 2	2.6% 0
94900 95000	Purley Church of England Primary School Robert Sandilands Primary School & Nursery	486,276 957,081	486,276 957,081	112 246	4,341.75 3,890.57	491,599 982,457	112 246	4,389.28 3,993.73	5,324 25,376	0	0 -563	-563	491,599 981,893		1.1% 0 2.6% 0
95100	Shaw-cum-Donnington Church of England Primary School	471,877	471,877	94	5,019.96	429,635	94	4,570.59	-42,241	42,241	0	42,241	471,877	0 0	0.0%
95200 95300	Shefford Church of England Primary School Speenhamland Primary School	237,283	237,283 1,095,560	29 291	8,182.16 3.764.81	240,564 1,140,032	29 291	8,295.31 3.917.63	3,281 44,471	0	-472 -15,113	-472 -15,113	240,092 1.124,919		1.2% 0 2.7% 0
95400	Springfield Primary School	1,079,845	1,079,845	301	3,587.53	1,098,842	301	3,650.64	18,997	0	0	0	1,098,842		1.8% 0
95500 95700	Spurcroft Primary School St. Finian's Catholic Primary School	1,556,195 736,784	1,556,195 736,784	433 197	3,593.98 3.740.02	1,595,824 762,712	433 197	3,685.51 3,871.63	39,628 25,927	0	0 -7,297	0	1,595,824 755,414		2.5% 0 2.5% 0
97700	St. John the Evangelist Infant & Nursery School	684,718	684,718	180	3,803.99	694,201	180	3,856.67	9,483	0	0	0	694,201	9,483 1	1.4% 0
97800 96200	St. Joseph's Catholic Primary School St. Nicolas Church of England Junior School	804,463 940,120	804,463 940,120	210 258	3,830.78 3.643.88	846,544 951,106	210 258	4,031.16 3.686.46	42,081 10.985	0	-21,456 0	-21,456 0	825,089 951,106		2.6% 0
	St. Pauls Catholic Primary School	1,144,663	1,144,663	325	3,522.04	1,192,932	325	3,670.56	48,269	0	-17,445	-17,445	1,175,487		2.7% 0
96300 96400	Stockcross Church of England Primary School Streatley Church of England Voluntary Controlled Primary S	428,993 436.667	428,993 436,667	101 98	4,247.46 4.455.78	424,220 431,445	101 98	4,200.20 4.402.50	-4,774	4,774 5.222	0	4,774 5.222	428,993 436.667	0 0	0.0% 0
96500	Sulhamstead and Ufton Nervet Church of England Voluntary	434,635	434,635	101	4,303.32	434,835	101	4,305.30	200	0	0	0	434,835	200 0	0.0%
99700 96600	Thatcham Park Church of England Primary School Theale Church of England Primary School	1,383,731 995,698	1,383,731 1,026,915	385 285	3,594.11 3,603.21	1,429,826 1,025,879	385 285	3,713.83 3,599.58	46,096	0 1,036	-8,446 0	-8,446 1,036	1,421,380 1,026,915		2.7% 0 0.0% 0
96700	Welford and Wickham Church of England Primary School	420,488	420,488	94	4,473.27	434,884	94	4,626.43	14,397	0	-5,951	-5,951	428,933	8,445 2	2.0% 0
96800 96900	Westwood Farm Infant School Westwood Farm Junior School	677,419 824.671	693,219 840,372	177	3,916.49 3.751.66	701,939 843,177	177 224	3,965.75 3.764.18	8,720 2,805	0	0	0	701,939 843,177		1.3% 0 0.3% 0
97000	Whitelands Park Primary School	1,165,957	1,165,957	316	3,689.74	1,189,943	316	3,765.64	23,986	0	0	0	1,189,943	23,986 2	2.1% 0
98700 99400	The Willows Primary School The Winchcombe School	1,353,646 1,574,421	1,353,646 1,629,008	344 405	3,935.02 4,022.24	1,420,385 1,518,147	344 405	4,129.03 3,748.51	66,739 -110,861	0 110.861	-30,341 0	-30,341 110,861	1,390,044 1,629,008		2.7% 0
97300	Woolhampton Church of England Primary School	411,519	411,519	92	4,473.03	398,848	92	4,335.31	-12,671	12,671	0	12,671	411,519	0 0	0.0% 0
97400 98900	Yattendon Church of England Primary School Denefield School	359,866 4,561,016	359,866 4.562.037	73 919	4,929.67 4,964.13	379,663	73 919	5,200.86 4,997.77	19,797 30.911	0	-13,229	-13,229	366,433		1.8% 0 0.7% 0
98800	The Downs School	4,265,350	4,265,350	898	4,749.83	4,195,136	898	4,671.64	-70,213	70,213	0	70,213	4,265,350	0 0	0.0%
99000 99100	John O'Gaunt Community Technology College Kennet School	1,859,398 6.617.820	1,859,398 6,771,243	336 1,391	5,533.92 4,867.90	1,829,018 6,785,395	336 1,391	5,443.51 4,878.07	-30,380 14,152	30,380	0	30,380	1,859,398 6,785,395		0.0% 0
99200	Little Heath School	6,211,648	6,211,648	1,281	4,849.06	6,257,490	1,281	4,884.85	45,842	0	0	0	6,257,490	45,842 0	0.7% 0
99300	Park House School	3,924,019	3,938,442	793	4,966.51	3,926,644 6.055,878	793	4,951.63	-11,798 4,139	0	0	0	3,926,644		0.3% 0
99800 99500	St. Bartholomew's School Theale Green Community School	6,109,196 2,717,548	6,051,739 2,785,416	1,264 551	4,787.77 5,055.20	6,055,878 2,828,725	1,264 551	4,791.04 5,133.80	4,139 43,308	53,318 0	0	53,318 0	6,109,196 2,828,725		1.6% 0
	Trinity School & Performing Arts College	3,805,268	3,998,670	779	5,133.08	4,069,046	779	5,223.42	70,377	0	0	0	4,069,046		1.8% 0
99600	The Willink School	4,207,766	4,207,766	862	4,881.40	4,171,298	862	4,839.09	-36,468	36,468	0	36,468	4,207,766	0 0	0.0% 0
	PRIMARY TOTAL	51,217,617		13,261	3,862	51,997,838	13,261	3,921	629,598	294,119	-221,871	72,248	52,070,086	701,847	0
	SECONDARY TOTAL TOTAL ALL SCHOOLS		44,651,709	9,074 22.335	4,880	44,711,579 96,709,417	9,074 22.335	4,927	59,869 689,467	190,379 484.498	0 -221.871	190,379	44,901,958 96,972,044	250,248 952.095	0
	TOTAL ALL SCHOOLS	90,496,646	96,019,949	22,335		90,709,417	22,335		089,467	404,498	-221,8/1	262,627	90,972,044	952,095	0

## Annex D

## Proposed Formula Exemplification 2018/19 At 0.5% MFG

		2017/	18 ACTUAI (includin		ATION		XEMPLIF		Change	MFG/0	CAP on G	AINS	Total Funding	Overali	Chang	le
Cost Centre	SCHOOL	Formula Budget	Formula add adjustments	Pupil No's (Oct 2016)	Per Pupil Funding	Formula Budget	Pupil No's (Oct 2016)	Per Pupil Funding	Prior to Transition Adjs	MFG 0.50%	CAP 3.0%	TOTAL	2018/19	Including Transition Funding	%	Pupil No's
	Aldermaston Church of England Primary School	729,665	729,665	185	3,944.14	738,294	185	3,990.78	8,629	0	0	0	738,294	8,629	1.2%	0
91100 91300	Basildon Church of England Primary School Beedon Church of England Controlled Primary School	574,121 283,256	574,121 283.256	143 46	4,014.83	591,095 270,824	143 46	4,133.53 5,887.48	16,974 -12,432	0 13.269	-3,575 0	-3,575 13,269	587,520 284,093	13,399 836	2.3%	0
91400	Beenham Primary School	395,997	395,997	82	4,829.23	395,037	82	4,817.53	-959	2,311	0	2,311	397,348	1,352	0.3%	0
91200	Birch Copse Primary School	1,449,809	1,449,809 573,436	424 142	3,419.36 4 038 28	1,464,757	424 142	3,454.62 4,035.86	14,948	2 634	0	2 634	1,464,757	14,948 2,290	1.0%	0
91500 91600	Bradfield Church of England Primary School Brightwalton Church of England Aided Primary School	573,436 429,227	429,227	142	4,038.28	573,092 426,519	142	4,035.86	-344 -2,708	4,276	0	4,276	575,726 430,795	2,290	0.4%	0
91700	Brimpton Church of England Primary School	300,320	300,320	50	6,006.39	281,253	50	5,625.06	-19,067	19,986	0	19,986	301,239	919	0.3%	0
91800 91900	Bucklebury Church of England Primary School	530,934 775,875	530,934 775,875	129 206	4,115.77	539,416 767,337	129 206	4,181.52 3,724.94	8,482 -8,538	0	0	11,776	539,416 779,113	8,482 3,238	1.6%	0
92000	Burghfield St. Mary's Church of England Primary School Calcot Infant School & Nursery	914,479	914,479	200	3,976.00	902,502	200	3,923.92	-11,977	15,900	0	15,900	918,402	3,923	0.4%	0
92100	Calcot Junior School	1,098,192	1,098,192	279	3,936.17	1,166,478	279	4,180.92	68,286	0	-39,449	-39,449	1,127,028	28,836	2.6%	0
95600 92400	Chaddleworth St. Andrew's Church of England Primary Sch Chieveley Primary School	227,955 782,595	227,955 782,595	29 209	7,860.53	222,891 782,615	29 209	7,685.89	-5,065	5,622 3,189	0	5,622	228,512 785,803	557 3 208	0.2%	0
95900	Cold Ash St. Mark's Church of England Primary School	732,690	732,690	197	3,719.24	728,805	197	3,699.52	-3,886	6,911	0	6,911	735,716	3,025	0.4%	0
92200	Compton Church of England Primary School	709,864	709,864 442,540	185 103	3,837.10 4,296.51	715,144 433,598	185 103	3,865.64	5,279	0	0	10.556	715,144	5,279 1,613	0.7%	0
92300 92500	Curridge Primary School Downsway Primary School	442,540	442,540	209	4,296.51 3,766.54	433,598 800,120	209	4,209.69 3,828.33	-8,943	10,556 0	0	10,556	444,153 800.120	1,613	1.6%	0
92800	Enborne Church of England Primary School	331,691	331,691	65	5,102.94	335,864	65	5,167.13	4,172	0	0	0	335,864	4,172	1.3%	0
92900 93000	Englefield Church of England Primary School Falkland Primary School	425,512 1,508,264	425,512 1.508,264	98 450	4,341.96 3,351.70	417,157	98 450	4,256.71	-8,354 14 944	9,905 0	0	9,905	427,062	1,550 14,944	0.4%	0
93100	Fir Tree Primary School & Nursery	804,033	804,033	191	4,209.60	808,091	191	4,230.84	4,057	0	0	0	808,091	4,057	0.5%	0
93200	Francis Baily Primary School	1,876,252	1,876,252	541	3,468.12	1,896,002	541	3,504.63	19,750	0	0	0	1,896,002	19,750	1.1%	0
93400 93500	Garland Junior School Hampstead Norreys Church of England Primary School	837,818 404,801	837,818 404 801	217 88	3,860.91 4 600.01	856,534 400,731	217 88	3,947.16 4,553.77	18,715	0 5.467	0	0 5 467	856,534 406,198	18,715 1,398	2.2%	0
	Hermitage Primary School	748,123	748,123	193	3,876.29	749,335	193	3,882.57	1,212	1,858	0	1,858	751,193	3,070	0.4%	0
93700	Hungerford Primary School	1,410,500	1,410,500	392	3,598.22	1,446,774	392	3,690.75	36,273	0	0	0	1,446,774	36,273	2.6%	0
92700 93800	The Ilsleys' Primary School Inkpen Primary School	302,308	302,308 363,081	57 76	5,303.66 4,777.38	315,419 361,544	57 76	5,533.66 4,757,15	13,110	0 2.770	-8,330	-8,330 2,770	307,089 364,314	4,780 1,233	1.6%	0
93900	John Rankin Infant & Nursery School	959,362	959,362	260	3,689.86	998,251	260	3,839.43	38,889	0	-13,989	-13,989	984,262	24,899	2.6%	0
94000	John Rankin Junior School	1,025,077	1,025,077	280	3,660.99	1,055,117	280	3,768.28	30,041	0	-3,298	-3,298	1,051,820	26,743	2.6%	0
94100 94200	Kennet Valley Primary School Kintbury St. Mary's Church of England Primary School	779,143 590,929	779,143 590,929	194 140	4,016.20 4,220.92	802,261 566,761	194 140	4,135.37 4,048.29	23,118	0 26.483	-3,577 0	-3,577 26,483	798,684 593,243	19,541 2,314	2.5% 0.4%	0
94300	Lambourn Church of England Primary School	793,951	793,951	196	4,050.77	839,905	196	4,285.23	45,955	0	-26,365	-26,365	813,541	19,590	2.5%	0
94400	Long Lane Primary School	778,698	778,698	208	3,743.74	779,275	208	3,746.52	577	2,670	0	2,670	781,945	3,247	0.4%	0
95800 97500	Mortimer St. Johns Church of England Infant School Mortimer St. Many's Church of England Junior School	692,545 802,498	692,545 802,498	181 216	3,826.22 3,715.27	687,276 807,546	181 216	3,797.11 3,738.64	-5,269 5,048	8,113 0	0	8,113	695,389 807,546	2,844 5,048	0.4%	0
94500	Mrs. Bland's Infant & Nursery School	683,198	683,198	169	4,042.59	702,255	169	4,155.35	19,057	0	-2,323	-2,323	699,932	16,734	2.4%	0
94600 94700	Pangbourne Primary School Parsons Down Infant School	785,442	785,442 818,920	205 217	3,831.43 3,773.83	794,773	205 217	3,876.94 3,852.37	9,331 17,044	0	0	0	794,773 835,964	9,331 17.044	1.2%	0
94700	Parsons Down Junior School	1,128,047	1,128,047	308	3,662.49	1,158,379	308	3,760.97	30,332	0	-651	-651	1,157,728	29,681	2.1%	0
94900	Purley Church of England Primary School	486,276	486,276	112	4,341.75	491,599	112	4,389.28	5,324	0	0	0	491,599	5,324	1.1%	0
95000 95100	Robert Sandilands Primary School & Nursery Shaw cum Doppington Church of England Primary School	957,081 471,877	957,081 471,877	246 94	3,890.57 5,019.96	982,457 429,635	246 94	3,993.73 4,570.59	25,376	0 44.007	-563 0	-563 44.007	981,893 473,642	24,813 1,765	2.6%	0
	Shaw-cum-Donnington Church of England Primary School Shefford Church of England Primary School	237,283	237,283	29	8,182.16	240,564	29	8,295.31	3,281	44,007	-472	-472	240,092	2,809	1.2%	0
95300	Speenhamland Primary School	1,062,242	1,095,560	291	3,764.81	1,140,032	291	3,917.63	44,471	0	-15,113	-15,113	1,124,919	29,359	2.7%	0
95400 95500	Springfield Primary School Spurcroft Primary School	1,079,845 1,556,195	1,079,845 1,556,195	301 433	3,587.53 3,593.98	1,098,842 1,595,824	301 433	3,650.64 3,685.51	18,997 39,628	0	0	0	1,098,842 1,595,824	18,997 39,628	1.8%	0
95700	St. Finian's Catholic Primary School	736,784	736,784	197	3,740.02	762,712	197	3,871.63	25,927	0	-7,297	-7,297	755,414	18,630	2.5%	0
97700	St. John the Evangelist Infant & Nursery School	684,718	684,718	180	3,803.99	694,201	180	3,856.67	9,483	0	0	0	694,201	9,483	1.4%	0
97800 96200	St. Joseph's Catholic Primary School St. Nicolas Church of England Junior School	804,463 940,120	804,463 940,120	210 258	3,830.78 3,643.88	846,544 951,106	210 258	4,031.16 3,686.46	42,081 10.985	0	-21,456 0	-21,456	825,089 951,106	20,626 10,985	2.6% 1.2%	0
96100	St. Pauls Catholic Primary School	1,144,663	1,144,663	325	3,522.04	1,192,932	325	3,670.56	48,269	0	-17,445	-17,445	1,175,487	30,824	2.7%	0
96300 96400	Stockcross Church of England Primary School	428,993 436,667	428,993 436,667	101 98	4,247.46	424,220 431,445	101 98	4,200.20	-4,774	6,346 6,802	0	6,346 6,802	430,566 438,247	1,572	0.4%	0
96500	Streatley Church of England Voluntary Controlled Primary S Sulhamstead and Ufton Nervet Church of England Voluntar	430,007	436,667	101	4,455.76	431,445	101	4,402.50	-5,222	1,398	0	1,398	436,233	1,598	0.4%	0
99700	Thatcham Park Church of England Primary School	1,383,731	1,383,731	385	3,594.11	1,429,826	385	3,713.83	46,096	0	-8,446	-8,446	1,421,380	37,650	2.7%	0
96600 96700	Theale Church of England Primary School Welford and Wickham Church of England Primary School	995,698 420,488	1,026,915 420,488	285 94	3,603.21	1,025,879 434,884	285 94	3,599.58	-1,036 14,397	5,529	0 -5,951	5,529 -5,951	1,031,408 428,933	4,494 8,445	0.4%	0
96800	Westwood Farm Infant School	677,419	693,219	177	3,916.49	701,939	177	3,965.75	8,720	0	0,001	-0,001	701,939	8,720	1.3%	0
96900	Westwood Farm Junior School	824,671	840,372	224	3,751.66	843,177	224	3,764.18	2,805	757	0	757	843,934	3,562	0.4%	0
97000 98700	Whitelands Park Primary School The Willows Primary School	1,165,957 1,353,646	1,165,957 1.353.646	316 344	3,689.74 3,935.02	1,189,943 1,420,385	316 344	3,765.64 4,129.03	23,986 66,739	0	0 -30,341	-30.341	1,189,943 1,390,044	23,986 36,398	2.1%	0
99400	The Winchcombe School	1,574,421	1,629,008	405	4,022.24	1,518,147	405	3,748.51	-110,861	118,275	0	118,275	1,636,423	7,415	0.5%	0
97300	Woolhampton Church of England Primary School	411,519	411,519	92	4,473.03	398,848	92	4,335.31	-12,671	14,153	0	14,153	413,001	1,482	0.4%	0
97400 98900	Yattendon Church of England Primary School Denefield School	359,866 4,561,016	359,866 4,562,037	73 919	4,929.67 4,964.13	379,663 4,592,948	73 919	5,200.86 4,997.77	19,797 30,911	0	-13,229 0	-13,229	366,433 4,592,948	6,568 30,911	1.8%	0
98800	The Downs School	4,265,350	4,265,350	898	4,749.83	4,195,136	898	4,671.64	-70,213	90,843	0	90,843	4,285,980	20,630	0.5%	0
99000 99100	John O'Gaunt Community Technology College	1,859,398	1,859,398	336 1.391	5,533.92 4 867.90	1,829,018	336 1,391	5,443.51 4,878.07	-30,380 14,152	38,740 3,436	0	38,740	1,867,758	8,360 17,587	0.4%	0
99100	Kennet School Little Heath School	6,617,820 6,211,648	6,771,243 6,211,648	1,391	4,867.90 4,849.06	6,785,395 6,257,490	1,391	4,878.07 4,884.85	14,152 45,842	3,436	0	3,436 0	6,788,830	45,842	0.3%	0
99300	Park House School	3,924,019	3,938,442	793	4,966.51	3,926,644	793	4,951.63	-11,798	16,383	0	16,383	3,943,027	4,585	0.1%	0
99800 99500	St. Bartholomew's School	6,109,196 2,717,548	6,051,739 2,785,416	1,264 551	4,787.77	6,055,878 2,828,725	1,264 551	4,791.04 5.133.80	4,139	82,580 0	0	82,580	6,138,459 2,828,725	86,720 43,308	1.4%	0
	Theale Green Community School Trinity School & Performing Arts College	3,805,268	2,785,416 3,998,670	779	5,055.20	2,828,725	779	5,133.80	43,308	0	0	0	2,828,725	43,308	1.6%	0
	The Willink School	4,207,766	4,207,766	862	4,881.40	4,171,298	862	4,839.09	-36,468	56,434	0	56,434	4,227,732	19,966	0.5%	0
	PRIMARY TOTAL	51,217,617	51.368.240	13.261		51,997,838	13.261		629.598	250.00/	-221.871	129.090	E0 400 000	758.689		
	PRIMARY TOTAL SECONDARY TOTAL	51,217,617 44,279,029		13,261 9,074	3,862 4,880	51,997,838 44,711,579	13,261 9,074	3,921 4,927	629,598 59,869	350,961 288,416	-221,871 0	129,090 288,416	52,126,928 44,999,994	758,689 348,285		0
	TOTAL ALL SCHOOLS	95,496,646		22,335	-,	96,709,417	22,335		689,467	639,377	-221,871	417,506	97,126,923	1,106,974		0

## **Criteria and Budgets for Additional Funds** 2018/19

Report being considered by:	Schools Forum					
On:	30/10/2017					
Report Author:	Claire White, Ian Pearson					
Item for:	Decision	By:	All Forum Members			

#### 1. Purpose of the Report

1.1 To set out the current criteria and budgets for additional funds for review by members, to ensure they are still relevant and meet their purpose.

#### 2. Recommendation(s)

- 2.1 The following changes are proposed:
  - Remove the Falling Rolls Fund from 2018/19.
  - Widen the criteria for primary schools in financial difficulty to enable schools currently not in deficit to apply for funding towards meeting restructuring costs that are required to avoid a deficit.
- 2.2 The changes are subject to consultation with all schools, and the final decision is to be taken at the December meeting of the Schools' Forum.

Executive for final determination?	Will the recommendation require the matter to be referred to the Council or the Executive for final determination?	Yes:	No:
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#### 3. Introduction/Background

- 3.1 Under the current school funding regulations, no in-year adjustments to funding allocations are permitted and all funding to schools has to be allocated through the approved formula. There are, however, four circumstances where the local authority can provide additional funding:
  - 1) A growth fund for the purpose of supporting growth in pre-16 pupil numbers to meet basic need; to support additional classes needed to meet infant class size regulation; and to meet the costs of new schools.
  - 2) A falling rolls fund where a population bulge is expected in the future but where a good and necessary school or academy currently has surplus places and faces an unmanageable funding shortfall in the short term.

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

Funding for both these funds is from the Schools' Block DSG, and any increase to the previous year's budget is deducted from the funding that is to be allocated out to primary and secondary schools through the funding formula.

- 3) Funding for schools in financial difficulty where a school phase has agreed to de-delegate this funding (primary phase only in West Berkshire). There needs to be agreed criteria on how this funding is to be determined and allocated to schools.
- 4) Funding can be used from the high needs block to allocate additional funding to schools which have a disproportionate number of high needs pupils. This has to be determined by a formulaic method.
- 3.2 In 2017/18 West Berkshire holds funds for each of these four circumstances. These now need to be reviewed and amended where appropriate. The forthcoming school funding consultation will also invite views from schools.
- 3.3 Schools' Forum will be required to agree the criteria and be consulted on the total sum to be top sliced from the DSG at the DECEMBER meeting. The Schools Forum will receive regular updates on the use of the funding.

#### 4. **Proposals**

- 4.1 2017/18 is the fourth year of using such funds, and the criteria have not been amended for the last two years.
- 4.2 The criteria for each fund are included in the appendices for members of the group to review.
- 4.3 No changes are proposed for the Growth Fund criteria.
- 4.4 It is proposed that the Falling Rolls Fund is removed. Not many other local authorities make use of such a fund and payments are made based on an assumption of future pupil numbers which may or may not materialise. In four years just one school has qualified (a payment of £23k has been made in 2017/18), yet the pupil numbers for this particular school are now no longer forecast to increase.
- 4.5 It is proposed to widen the criteria for primary schools to access the schools in financial difficulty fund. The proposal is for schools not in deficit but required to restructure to avoid going into deficit, to be eligible to apply for reimbursement of the one off redundancy cost. This will still be subject to the same application and scrutiny process. It is felt by Heads that those who forward plan their restructures and avoid going into deficit are then disadvantaged by not being able to access this fund
- 4.6 No changes are proposed to the criteria for schools with a disproportionate number of high needs pupils.

TABLE 1	Growth Fund	Falling Rolls Fund	Primary Schools in Financial difficulty	Additional High Needs Funding
Budget Set 2014/15	250,000	120,000	115,470	48,000
Actual Spend 2014/15	148,341	0	112,297	38,576
Budget Set 2015/16	250,000	40,000	115,110	50,000
Actual Spend 2015/16	158,563	0	18,677	87,966
Budget Set 2016/17	250,000	40,000	117,320	127,690
Actual Spend 2016/17	100,922	0	137,930	114,033
Budget Set 2017/18	162,000	40,000	119,980	100,000

4.7 The budget for each fund also needs to be agreed. Previous year's budgets and actual are shown in Table 1.

- 4.8 The Schools Block allocation for 2018/19 includes £202,000 for the growth fund & falling rolls fund. It is proposed that the budget for the growth fund is kept as per the DSG allocation, and any unspent allocation from 2017/18 is carried forward and added to this fund in 2018/19. This is being mindful that in September 2019 a new primary school is due to open, and the additional funding for this will need to be met from the Schools Block DSG. All unspent growth funding up to the end of 2016/17 was reallocated back to schools in 2017/18. The funding arrangements for the next two years will require the growth fund to be met from the Schools Block DSG and there are no plans yet for the DfE to fund this element on in year requirements it is currently being allocated based on historical budgets.
- 4.9 The primary schools in financial difficulty fund should also continue at the current level, as it is likely more schools will have difficulty in balancing their budgets and will undergo staffing restructures which will qualify for funding.
- 4.10 It is apparent that the number of schools with a disproportionate number of high needs pupils is continuing to grow, and funding needs to be set aside from the high needs block at the current level of spend, in order to fund those schools qualifying.
- 4.11 All the above proposals were agreed by Heads Funding Group on 11<sup>th</sup> October 2017.

#### 5. Appendices

Appendix A – Current Growth Fund Criteria 2017/18

Appendix B – Current Falling Rolls Fund Criteria 2017/18

Appendix C – Current Funding for Primary Schools in Financial Difficulty Criteria 2017/18

Appendix D – Current Additional High Needs Funding Criteria 2017/18

## **Appendix A**

### **Growth Fund Criteria 2017/18**

#### 1. Background

- 1.1 Under the current School Funding Regulations, local authorities can set up a growth fund from the DSG in advance of allocating school budget shares. The purpose of the growth fund is to support maintained schools and Academies which are required to provide extra places in order to meet basic need within the authority and to meet the cost of new and reorganised schools including pre-opening and diseconomy costs. It can also include funding schools where very limited pupil number growth requires an additional class as required by infant class size regulations. It cannot be used for general growth in pupil numbers at a school due to a school's popularity.
- 1.2 The growth fund is ring-fenced so that it can only be used for the purpose of supporting growth in <u>pre 16</u> pupil numbers to meet basic need. Any funds remaining at the end of the financial year must be added to the following year's DSG and reallocated to maintained schools and Academies through the local formula.
- 1.3 Local authorities are required to provide on a transparent and consistent basis the criteria on which any growth funding is to be allocated. The criteria should both set out the circumstances and have clear objective trigger points for a school to qualify for payment and provide a clear formula for calculating the sum to be paid.
- 1.4 The Schools' Forum is required to agree the criteria and the total sum to be top sliced from each phase, and will receive reports on the use of the funding.
- 1.5 The criteria and funding for 2017/18 as agreed by the Schools' Forum at its meeting on 5<sup>th</sup> December 2016 is set out below.

#### 2. Growth Fund Criteria

#### 2.1 New School

<u>Pre opening costs</u> payable to a new school such as for the Headteacher and other staffing and recruitment costs prior to opening and initial equipping allowance *where the school is opening in response to basic need in the area.* 

Funding will be actual cost of staff appointed and in post prior to the opening of the new school up to a maximum of  $\pounds75,000$ , plus a fixed one-off lump sum of  $\pounds25,000$  for all other purchases necessary before the school opens.

**Diseconomies of scale**. The total pupil numbers required by the new school to ensure viability will be agreed in advance with the school on an annual basis whilst the school is growing to full capacity and funding paid via the school formula will be based on this number. This will meet any diseconomies of scale and the school will not require additional funding from the growth fund.

#### 2.2 <u>Extending Age Range (including new schools)</u>

This is payable to a school which has extended its age range and set up a new class in agreement with the authority *in response to basic need in the area*. Funding is payable from the growth fund where the new pupil numbers have not been added to the school formula funding in agreement with the DfE (i.e. the deadline for such

agreement was missed) or the new pupil numbers are greater than the number agreed with the DfE.

Funding will be total AWPU per additional pupil in the new class (pro rata for the remainder of the financial year).

#### 2.3 Provision of an Extra Class

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

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

#### 2.4 Increase in Pupil Admission Number (PAN)

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

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

#### 2.5 KS1 Classes (infant class size)

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

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

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

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

#### 3. Funding to be Top sliced from DSG

3.1 The sum to be set aside in 2017/18 is as follows:

Estimated Requirement	Calculation	Total
New School (none expected)		£0
Extending Age Range (none		£0
expected)		
Additional Classes x 4	£50,000 x 4 x 7/12	£116,000
Increase in PAN (none expected)		£0
Infant classes x 2	£40,000 x 2 x 7/12	£46,000
Contingency		£0
TOTAL DSG REQUIREMENT		£162,000

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



### Falling Rolls Fund Criteria 2017/18

#### 1. Background

- 1.1 Since 2014/15, local authorities have been able to top slice the DSG in order to create a small fund to support good schools with falling rolls. This is for where a population bulge is expected in the future but where a good and necessary school or academy currently has surplus places and faces an unmanageable funding shortfall in the short term.
- 1.2 The falling rolls fund is ring-fenced. Any funds remaining at the end of the financial year must be added to the following year's DSG and reallocated to maintained schools and Academies through the local formula.
- 1.3 It is mandatory that the falling rolls fund is restricted to population increases expected in 2-3 years in necessary schools which are classed by OFSTED as good or outstanding.
- 1.4 Local authorities are required to provide on a transparent and consistent basis the criteria on which any falling rolls funding is to be allocated. The criteria should both set out the circumstances in which a payment could be made and provide a basis for calculating the sum to be paid.
- 1.5 The Schools' Forum is required to agree the criteria and the total sum to be top sliced from each phase, and will receive reports on the use of the funding.
- 1.6 The criteria and funding for 2017/18 as agreed by the Schools' Forum at its meeting on 5<sup>th</sup> December 2016 is set out below.

#### 2. Falling Rolls Criteria

- 2.1 School must have been judged good or outstanding at their last OFSTED inspection.
- 2.2 The total number of pupils on roll (4 16) has fallen by at least 10% or 30 pupils between October 2016 census and October 2017 census.
- 2.3 Local planning data shows a requirement for at least 50% of these places being refilled within the next 3 years.
- 2.4 According to the current pupil numbers on roll, the school needs to reduce the number of classes required now, but will need to increase the number again within the next 3 years (calculation based on classes of 30 pupils)
- 2.5 Where a school meets the above criteria, funding will be provided equivalent to the staffing cost of continuing to run the additional class(s) at a fixed sum of £40,000 per class pro rata to the number of pupils the roll has reduced by in each class (e.g. if year 3 has reduced by 10 compared to 30 in the previous year, payment will be  $\pounds 40,000 \ge 13,333$  for this class).
- 2.6 The payment will be made the following financial year, as funding for the remainder of the current financial year is still based on the previous October's higher pupil

numbers. This will enable the school to continue with the current number of classes in the following financial year without incurring a redundancy.

#### 3. Funding to be Top sliced from DSG

- 3.1 The sum to be set aside in 2017/18 is £40,000
- 3.2 Funding requests from schools are to be submitted to Schools' Finance who will make payment following approval by the Head of Education if he is satisfied that the criteria are met. All approvals will be reported to Schools' Forum.
- 3.3 Any overspends in year will be met from a top slice of the following years DSG allocation. Any underspends will be carried forward and reallocated to all schools through the following years funding formula.

## Appendix C

### Funding for Primary Schools in Financial Difficulty Criteria 2017/18

#### 1. Background

- 1.1 Under School funding reform, from April 2013 local authorities have been required to delegate to all schools the contingency previously held for schools in financial difficulty. Each phase in the maintained sector has the option of de-delegating this funding to continue to have this funding centrally retained.
- 1.2 At the Schools' Forum meeting held on 5<sup>th</sup> December 2016, the primary school members of the Forum opted to continue to de-delegate this funding in 2017/18 at a rate of £9.64 per pupil. The amount totals £119,980 in 2017/18.
- 1.3 The Schools' Forum is required to set clear criteria for the allocation of this funding. The criteria for 2017/18 was reviewed and agreed by the Schools' Forum at its meeting on 5<sup>th</sup> December 2016 and is set out below.

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

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

- 1. The school has sought and followed the advice of the Schools' Accountancy Service **prior** to going into deficit
- 2. The school has (up to) a five year robust deficit recovery plan in place which has been discussed with and verified by the Schools' Accountancy Service.
- 3. Additional funding may be payable for one of the following exceptional unforeseen circumstances which has taken the school into deficit:
  - Short term downturn in pupil numbers to maintain current staffing structure where evidence can be provided that the numbers are likely to recover within a 2 - 3 year period and where downsizing of staff and resultant redundancy costs in order to balance the budget on a short term basis would not be an efficient use of resources.
  - Sudden permanent downturn in pupil numbers in a school causing concern (i.e. Ofsted category of notice to improve or worse) - to maintain current staffing levels on a temporary basis where to reduce the staffing levels immediately in order to balance the budget would be detrimental to the recovery of standards in the short term.
  - Unforeseen sudden permanent downturn in pupil numbers to cover staffing costs during a short term interim period whilst restructuring takes place and in order where possible to avoid redundancies (such as through natural wastage).
  - Redundancy payments, where the staffing reductions are required in order to balance the budget, but these costs will put the school further into a deficit position and taking the school longer to recover the deficit.
  - Any other one off costs incurred on recovery of the deficit, such as specialist consultancy advice/support. (it was agreed by Schools' Forum on 11<sup>th</sup> July 2016 that where West Berkshire's Accountancy Service are engaged for such

support, the cost can be charged direct to this fund without making a separate bid).

In order to access this funding, a school will need to complete and submit an application to the WBC Schools' Finance Manager who will arrange a panel (usually the next Heads Funding Group) to assess the application. The school will be invited to present their case in person to the panel and answer questions. The panel will also be provided with benchmarking information produced by Schools' Accountancy (which will be shared with the school prior to the meeting). The panel will recommend the amount and duration of the financial support to Schools' Forum for approval or not.

## Appendix D

### Additional High Needs Funding Criteria 2017/18

#### 1. Background

- 1.1 Local authorities can provide additional targeted support to individual schools <u>from</u> <u>its high needs block</u> where it would be unreasonable to expect the first £6,000 of support for that schools high needs pupils to be met by them from its (pre 16) formula funding due to an exceptional number of such pupils on its roll.
- 1.2 The guidance from the DfE has stated that the additional funding paid to schools should be formulaic based on the number of high needs pupils in each school. It cannot take into account lower level needs of pupils. The formula or criteria should be as clear and simple as possible, and should be devised so that additional funds are targeted only to a minority of schools which have particular difficulties because of their **disproportionate number** of high needs pupils or their characteristics.
- 1.3 The Schools' Forum agreed the methodology at its meeting on 5<sup>th</sup> December 2016, and this is set out below.

#### 2. Methodology and Process

- 2.1 There will be an additional payment to schools where the actual number of pre 16 high needs pupils (i.e. pupils in mainstream receiving top ups) is significantly (1%) above the average of all schools in West Berkshire.
- 2.2 Where the actual number of pre 16 high needs pupils per school is 1% above the West Berkshire average (the average is calculated using the number of high needs pupils in January 2017 and shown in the pink column on the attachment), each additional high needs pupil will attract £6,000 in addition to the top up. The number of additional pupils will be calculated on a proportionate basis rather than rounding up or down to whole pupil numbers to avoid a funding cliff-edge.
- 2.3 The funding will be paid pro rata each term based on the actual number of pre 16 pupils receiving top ups at that time for the number of days in that term i.e. calculated and paid in April, October and January.
- 2.4 The attached table shows for each school how many high needs pupils equals the average + 1% (the pink column) before qualifying for additional funding in 2017/18. Schools will receive £6,000 per 1.0 high needs pupils they have on roll *above this average number*. Note that funding may be a proportion of £6,000 if the calculation is less than 1.0.
- 2.5 The amount of funding to be set aside for this purpose in the high needs budget will be £100,000.

# Provisional 2017/18 Additional SEN Funding for Schools with Disproportionate large numbers of High <u>Needs Pupils</u>

	numbers of High		Relevant Data			Indicative Fundin	g
Cost Centre	SCHOOL	Total Pre 16 Pupil No.s (Oct 2016 Census excl RU)	Mainstream Pre 16 Pupil No.s Receiving Top Ups January 2017	Notional SEN Budget 2017/18	Average No. of Pupils Formula Funded	High Needs Pupils Above Average (un rounded)	Indicative Add'l Funding
	Primary				1.99%	1% above LA avg	£6,000
91000	Aldormaston Church of England Brimany School	185	5	34,653	2.46% 3.68	1% above LA avg 1.32	7,89
91100	Aldermaston Church of England Primary School Basildon Church of England Primary School	143	3	24,472	2.85	0.15	7,88 91
91300	Beedon Church of England Controlled Primary School	46	0	11,561	0.92	0.00	01
91400	Beenham Primary School	82	0	17,191	1.63	0.00	
91200	Birch Copse Primary School	424	3	64,270	8.44	0.00	
91500	Bradfield Church of England Primary School	142	2	28,477	2.83	0.00	
91600	Brightwalton Church of England Aided Primary School	100	1	14,093	1.99	0.00	-
91700 91800	Brimpton Church of England Primary School Bucklebury Church of England Primary School	50 129	1	11,691 22,389	1.00 2.57	0.00 0.00	2
91900	Burghfield St. Mary's Church of England Primary School	206	3	29,456	4.10	0.00	
92000	Calcot Infant School & Nursery	230	0	45,796	4.58	0.00	
92100	Calcot Junior School	279	3	91,677	5.56	0.00	
95222	Chaddleworth St. Andrew's C of E Primary School	29	1	11,526	0.58	0.42	2,53
92400	Chieveley Primary School	209	2	25,742	4.16	0.00	
95900 92200	Cold Ash St. Mark's Church of England Primary School Compton Church of England Primary School	197 185	1	23,546 34,594	3.92 3.68	0.00 0.00	
92300	Curridge Primary School	103	0	12,328	2.05	0.00	
92500	Downsway Primary School	209	5	33,736	4.16	0.84	5,03
92800	Enborne Church of England Primary School	65	0	16,067	1.29	0.00	
92900	Englefield Church of England Primary School	98	4	14,144	1.95	2.05	12,29
93000	Falkland Primary School	450	6	58,917	8.96	0.00	
93100	Fir Tree Primary School & Nursery	191	3	54,462	3.80	0.00	
93200	Francis Baily Primary School	541	5	96,470	10.77	0.00	
93400 93500	Garland Junior School Hampstead Norreys Church of England Primary School	217 88	1 0	48,824	4.32 1.75	0.00 0.00	
93600	Hermitage Primary School	193	2	32,084	3.84	0.00	
93700	Hungerford Primary School	392	1	84,459	7.81	0.00	
92700	The IIsleys' Primary School	57	0	7,368	1.13	0.00	
93800	Inkpen Primary School	76	1	14,433	1.51	0.00	
93900	John Rankin Infant & Nursery School	260	5	46,502	5.18	0.00	
94000	John Rankin Junior School	280	5	55,496	5.58	0.00	
94100	Kennet Valley Primary School	194	2	52,515	3.86	0.00	
94200	Kintbury St. Mary's Church of England Primary School	140	3	23,570	2.79	0.21	1,27
94300	Lambourn Church of England Primary School	196	1	51,893	3.90	0.00	
94400 95800	Long Lane Primary School Mortimer St. John's Church of England Infant School	208 181	2	31,134 23,458	4.14 3.60	0.00 0.00	
97500	Mortimer St. John's Church of England Junior School	216	5	39,652	4.30	0.70	4,19
94500	Mrs. Bland's Infant & Nursery School	169	0	38,266	3.37	0.00	-, 10
94600	Pangbourne Primary School	205	2	35,361	4.08	0.00	
94700	Parsons Down Infant School	217	0	39,579	4.32	0.00	
94800	Parsons Down Junior School	308	5	67,252	6.13	0.00	
94900	Purley Church of England Infants School	112	3	21,570	2.23	0.77	4,61
95000	Robert Sandilands Primary School & Nursery	246	3	56,621	4.90	0.00	
95100 95200	Shaw-cum-Donnington Church of England Primary School Shefford Church of England Primary School	94 29	2	19,788 6,933	1.87 0.58	0.13 0.00	77
95300 95300	Speenhamland Primary School	29	3	72,017	5.60	0.00	
95400	Springfield Primary School	301	6	49,912	5.99	0.00	3
95500	Spurcroft Primary School	433	1	89,943	8.62	0.00	-
95700	St. Finian's Catholic Primary School	197	1	35,083	3.92	0.00	
97700	St. John the Evangelist Infant & Nursery School	180	1	27,122		0.00	
97800	St. Joseph's Catholic Primary School	210	2	40,579		0.00	
96200	St. Nicolas Church of England Junior School	258	2	46,370		0.00	
96100	St. Pauls Catholic Primary School	325	0	56,432	6.47	0.00	
96300 96400	Stockcross Church of England Primary School Streatley Church of England VC Primary School	101 98	1 0	12,089 16,224	2.01 1.95	0.00 0.00	
96400 96500	Sulhamstead and Ufton Nervet C of E VA Primary School	98	2	16,224	2.01	0.00	
99700 99700	Thatcham Park Church of England Primary School	385	3	81,860		0.00	
96600	Theale Church of England Primary School	275	3	43,737	5.48	0.00	
96700	Welford and Wickham Church of England Primary School	94	1	14,799	1.87	0.00	
96800	Westwood Farm Infant School	172	2	29,114	3.42	0.00	
6900	Westwood Farm Junior School	219	2	37,267	4.36	0.00	
97000	Whitelands Park Primary School	316	1	79,975	6.29	0.00	
8700	The Willows Primary School	344	2	103,779		0.00	
9400	The Winchcombe School Woolhampton Church of England Primary School	390	5	85,869	7.77	0.00	
97300 97400	Yattendon Church of England Primary School	92 73	0	12,553	1.83 1.45	0.00 0.00	
98900	Denefield School	919	6	231,517		0.00	
98800	The Downs School	898	12	132,595	22.06	0.00	
99000	John O'Gaunt Community Technology College	336	18	118,258	8.26	9.74	58,47
99100	Kennet School	1,362	15	346,200		0.00	
99200	Little Heath School	1,281	22	228,317		0.00	
99300	Park House School	793	8	201,503		0.00	
99800	St. Bartholomew's School	1,264	8	212,021	31.05	0.00	
99500	Theale Green Community School	537	7	120,284	13.19	0.00	
99900	Trinity School & Performing Arts College	740	18	253,132	18.18	0.00	
99600	The Willink School	862	17	130,708	21.18	0.00	20.5
	PRIMARY TOTAL SECONDARY TOTAL	13,216 8,992	131 131		263 221	7 10	39,5 58,4
		0,992	131		221	10	38.4







**Dear Director** 

We are writing on behalf of all employees working within the boundaries of your local authority area who are members of NAHT and the ATL and NUT sections of the National Education Union.

You will recall that, from last April, local schools agreed through your Schools Forum to 'dedelegate' funding for supply cover costs, including for trade union facilities time. We believe that this was the right decision – and a very big majority of Schools Forums made the same decision, acting in accordance with advice issued by the Local Government Association and the National Employers' Organisation for School Teachers in October 2015.

We believe that the central retention and distribution of the fund is the most effective and efficient arrangement and we would like to work with you to ensure that this arrangement continues. Discussions are now taking place in your authority on funding arrangements for supply cover costs from April next year and we are asking you to pass the information in this letter to members in your Schools Forum and to encourage them to vote again for dedelegation of funding arrangements for supply cover costs.

Successive governments have recognised the importance of good industrial relations and have legislated to provide a statutory basis for facilities time as follows.

- Paid time off for union representatives to accompany a worker to a disciplinary or grievance hearing.
- Paid time off for union representatives to carry out trade union duties.
- Paid time off for union representatives to attend union training.
- Paid time off for union 'learning representatives' to carry out relevant learning activities.
- Paid time for union health and safety representatives during working hours to carry out health and safety functions.

These provisions are contained within the Employment Relations Act 1999 and the Trade Union Labour Relations (Consolidation) Act 1992 and the Safety Representatives and Safety Committees Regulations 1977.

NAHT and NEU have members and union representatives in academies as well as maintained schools within your local authority area and, in addition to seeking your support for continued de-delegation, we are seeking your agreement for the local trade union funding arrangement to be formally extended to academies within your local authority boundaries.

As the DfE Advice on Trade Union Facility Time acknowledges, the trade union recognition agreement between the authority and the recognised unions will have transferred to the academy school as the new employer of the transferred staff as part of the conversion process to academy status under TUPE. We believe that, following conversion, academies should also become parties to local authority trade union facilities arrangements.

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Union Ref A1

The academies within your boundaries will have received funding for trade union facilities time in their budgets and they are entitled to use that funding to buy-back into local authority arrangements. Indeed, many academies across England have already agreed to buy in to local authority trade union facilities arrangements.

Pooled funding will help the local authority and all schools to meet their statutory obligations on trade union facilities time. Setting up a central funding arrangement will allow academies to pay into a central pool if they wish to. But most importantly it will help maintain a coherent industrial relations environment where issues and concerns whether individual or collective can be dealt with more effectively. All these points are echoed in the advice issued by the LGA and NEOST.

We urge you therefore to support the de-delegation funding for supply cover costs and to continue or establish (if you did not do so previously) a mechanism whereby academies within your boundaries are able to buy into a central fund for trade union facilities time. If you agree to do so, we will write to academy principals to encourage them to buy in to your arrangement.

Yours sincerely

Paul Whiteman Mary Bousted Kevin Courtney

## **De-delegation Proposals 2018/19**

Report being considered by:	Schools Forum		
On:	30/10/2017		
<b>Report Author:</b>	Gabrielle Esplin,	lan Pe	arson
Item for:	Decision	By:	All Maintained Schools Representatives

#### 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) whether or not they should be de-delegated.

#### 2. Recommendation(s)

- 2.1 To note the views of the Heads Funding Group on the de-delegations set out in Table 7.
- 2.2 To include these proposals in the consultation with all schools on funding arrangements for 2018/19.

Will the recommendation require the matter to be referred to the Council or the Executive for final determination?	Yes:	No: 🔀

#### 3. Background

- 3.1 The Schools' Forum in December 2016 and January 2017 agreed for the following services to be centrally provided to primary and secondary maintained schools in the 2017/18 financial year through the pooling of funding:
  - Behaviour Support Services
  - Ethnic Minority Support
  - Trade Union Representation
  - Schools in Financial Difficulty (primary only)
  - CLEAPSS
  - Stautory and Regulatory Duties comprising:
    - Statutory accounting functions in respect of schools
    - Internal Audit of schools
    - Administration of pensions for school staff
    - Health and Safety (level 1 support)
- 3.2 The schools funding regulations for 2018/19 have now been published and these confirm that similar arrangements will apply for dedelegation of the cost of these services will apply for the financial years 2018/19 and 2019/20. Funding arrangements are expected to change in 2020/21, but details of the changes have not yet been announced.

- 3.3 Representatives of Primary and Secondary schools are required to make a recommendation to Schools Forum whether or not funds should be de-delegated in the financial year 2018/19 for:
  - Behaviour Support Services
  - Ethnic Minority Support
  - Trade Union Representation
  - Schools in Financial Difficulty (primary only)
  - CLEAPSS

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.

- 3.4 In the case of the services which make up Statutory and Regulatory Duties, representatives of all maintainted schools (including Special and Nursery Schools and PRUs) are required to recommend to Schools Forum whether or not funds should be de-delegated.
- 3.5 For 2018/19 Schools are also being offered the option to pool funds for the provision of level 2 Health and Safety support, as part of the Statutory and Regulatory Duties block (option 1).
- 3.6 The Schools' Forum also agreed for 2018/19 to pool funds for the provision of the statutory element of the School Improvement Service, which was previously funded from the Education Services Grant. However a new School Improvement Grant has now been made available to the Local Authority to provide this service, so it is no longer necessary to propose the pooling of schools' funds for School Improvement.
- 3.7 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.
- 3.8 Appendix A sets out the total cost of each service and an initial estimate of the amount to be de-delegated from each school. This estimate is based on the October 2016 census. However the final amounts will be based on the October 2017 census when that data becomes available.

#### 4. Behaviour Intervention Service

- 4.1 The Behaviour Intervention Service proposal for 2018/19 is set out in Appendix B.
- 4.2 Table 1 shows the budget and unit charge for 2018/19 compared to 2017/18. The total cost will be divided by the total numbers of pupils in the October 2017 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 2016 census this is estimated to be £14.05 per pupil but the final rate will be determined according to the October 2017 census.

TABLE 1	2017/	18	2018/19	
	Unit Charge per pupil	Budget	Estimated Unit Charge per pupil	Budget
Maintained Primary Schools	£13.77	£171,470	£14.05	£174,897
Maintained Secondary Schools	£13.77	£41,900	£14.05	£42,733
Total		£213,370		£217,630

#### 5. Ethnic Minority and Traveller Achievement Service

- 5.1 The detail of the Ethnic Minority and Traveller Achievement Service (EMTAS) is set out in Appendix C.
- 5.2 Table 2 shows the budget and the estimated unit charge for the service for 2018/19 compared to 2017/18. The total costl in respect of Primary and Secondary schools will be divided by the total number of pupils recorded as having English as an additional language (EAL) in the October 2017 census to determine a unit charge per EAL 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 of £274.17 per pupil is lower than the rate for 2017/18 because the service spent £38,300 less than the amount which was agreed to be de-delegated in 2016/17 and this amount can be used to help meet the cost of delivering the service in 2018/19. The estimated unit charge is based on the October 2016 census, but the final rate will be determined according to the number of EAL pupils in the October 2017 census.

TABLE 2	2017	/18	2018/19	)
	Unit Charge Budget		Estimated Unit	Budget
	per pupil		Charge per pupil	
	with EAL		with EAL	
Maintained Primary Schools	£349.43	£226,052	£274.17	169,085
Maintained Secondary Schools	£349.43	£5,248	£274.17	4,392
		£231,300		173,477

#### 6. Trade Union Representation

6.1 The detail of the service provided by Trade Union representatives to schools is set out in Appendix D.

Table 3 shows the budget and unit charge for the service for 2018/19 compared to 2017/18. The proposal for 2018/19 is the same as 2017/18 with the cost based on 1FTE supply teacher on UPS3. It is assumed there will also be some buy in from academy schools. The total net cost in respect of Primary and Secondary schools will be divided by the total number of pupils in the October 2017 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 2016 census this currently estimated to

be £3.01 per pupil but the final rate will be determined according to the October 2017 census.

TABLE 3	2017/	/18	2018/19		
	Unit Charge Budget		Estimated Unit	Estimated	
	per pupil		Charge per pupil	Budget	
Maintained Primary Schools	£3.16	£39,297	£3.13	38,930	
Maintained Secondary Schools	£3.16	£9,603	£3.13	9,512	
		£48,900		48,442	

#### 7. Schools in Financial Difficulty

- 7.1 If schools decide to de-delegate funding to provide a fund for schools in financial difficulty, the amount to be pooled can be for any amount. Currently only primary schools de-delegate.
- 7.2 The proposal shown in Table 4 assumes continuing with an annual fund of £120,000, which would equate to £9.64 per pupil based on the October 2016 census but the final rate will be determined according to the October 2017 census.

TABLE 4	2017/1	18	2018/19			
	Unit Charge per pupil	Budget	Estimated Unit Charge per pupil	Estimated Budget		
Maintained Primary Schools	£9.64	£120,000	£9.64	£120,000		
Maintained Secondary Schools						
		£120,000		£120,000		

7.3 More schools are now applying for funding, and it is largely used for one off exceptional costs such as those in relation to staffing restructures. If it is agreed to continue pooling, Schools' Forum will also be required to agree the criteria for primary schools to access this fund.

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

- 8.1 The detail of the service provided by this subscription is set out in Appendix E.
- 8.2 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 2018/19 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 2018/19 compared to 2017/18. 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		2017/18		2018/19			
	Unit Charge per pupil	Charge per school	Budget	Estimated Unit Charge per pupil	Estimated Charge per school	Estimated Budget	
Maintained Primary Schools	£0.15		£1,870	£0.16		1,991	
Maintained Secondary Schools	£0.15	£220	£1,120	£0.16	£225	1,162	
			£2,990			3,153	

#### 9. Statutory and Regulatory Duties

- 9.1 The statutory regulatory duties consist of the statutory functions in respect of schools of Accountancy, Internal Audit, Pension scheme administration and Health and Safety. The Accountancy, audit and pension administration services are described in appendix F.
- 9.2 In 2017/18 funds to provide level 1 Health and Safety support were de-delegated but individual schools were given the choice whether or not to buy back level 2 support. The Health and Safety service is proposing two alternative options for de-delegation, as set out in appendix G. Option 1 is to de-delegate funds to provide level 1 and 2 support for all maintained primary and secondary schools. Option 2 is the same arrangement as for 2017/18.
- 9.3 Table 6 shows the budget and estimated unit charges for these services 2018/19 compared to 2017/18. The total cost will be divided by the total numbers of pupils in the October 2017 census to determine a unit charge per pupil on which the dedelegated amount per school will be based. The same unit charges will apply to both primary and secondary schools. The estimated unit charges shown are based on the October 2016 census but the final rates will be determined according to the October 2017 census.

TABLE 6	201	17/18			2018/19		
	Charge per Pupil	Budget	Estimated Unit Charge per pupil	Estimated Total Budget	Estimated Primary Budget	Estimated Secondary Budget	Estimated budget for Nursery, Special Schools and PRUs
Accountancy	£2.00	£30,953	£2.09	£33,793	£25,977	£6,347	£1,469
Audit	£2.70	£41,883	£2.29	£45,173	£34,724	£8,484	£1,964
Pension Scheme Administration	£1.96	£30,404	£2.09	£33,759	£25,950	£6,341	£1,468
Health and Safety Option 1	£10.06	£155,764	£10.34	£167,446	£128,716	£31,450	£7,281
Health and Safety Option 2	£3.66	£56,642	£3.52	£56,962	£43,787	£10,699	£2,477
Total Option 1	£16.62	£259,007	£17.30	£280,171	£215,367	£52,622	£12,182
Total Option 2	£10.32	£159,882	£10.48	£169,687	£130,438	£31,871	£7,378

#### **10.** Summary of Proposals

10.1 Table 7 summarises the services and budgets which are proposed to be dedelegated in 2018/19:

TABLE 7	2018/19 Primary Budget £	Agreed by HFG	2018/19 Secondary Budget £	Agreed by HFG	2018/19 Early Years & High Needs Budgets £	Agreed by HFG
Behaviour Integration	174,897	Yes	42,733	TBD	n/a	n/a
Ethnic Minority Support	169,085	Yes	4,392	Yes	n/a	n/a
Trade Union Representation	38,930	Yes	9,512	Yes	n/a	n/a
Schools in Financial Difficulty	120,000	Yes	n/a		n/a	n/a
CLEAPSS	1,991	Yes	1,162	Yes	n/a	n/a
Statutory and Regulatory Duties Option 1	215,367	No	52,622	No	12,192	No
Statutory and Regulatory Duties Option 2	130,438	Yes	31,871	Yes	7,378	Yes

#### **11. Consultation and Engagement**

11.1 The proposals set out in this report will be included in the consultation with all schools on the proposed school funding arrangements for 2018/19.

#### 12. Appendices

Appendix A – Indicative De-delegations per school for 2018/19

Appendix B – Behaviour Support Service

Appendix C – Ethnic Minority & Traveller Achievement Service

Appendix D – Trade Union Representation Service

Appendix E – CLEAPSS Service

Appendix F – Accountancy, Audit and Pension Administration

Appendix G- Health and Safety

De-delegation Proposals 2018/19

#### De-delegation Proposals 2018/19

Indicative Design           Proposed Primary Dedelegation           Total Proposed Dedelegation           Total Proposed Dedelegation           Estimated income from other maintained schools           Total Cost of Service           Indicative cost per primary pupil           Indicative cost per secondary pupil           Redemand Control of England Primary School           Basildon Church of England Primary School           Beenham Primary School           Brightwalton Church of England Primary School           Brightwalton Church of England Primary School           Brightwalton Church of England Primary School           Burghteid St. Mary's Church of England Primary School           Burghteid St. Mary's Church of England Primary School           Cheveley Primary School           Compton Church of England Primary School           Cont Junior School           Compton Church of England Primary School           Compton Church of England Primary School	EAL No's 5 73 3 0.00 6 3.5 7 2 0.00 9	Behaviour Integration £174,897 £42,733 £217,630 £14.05 £19.05 £19	Ethnic Minority Support £169,085 £4,392 £173,477 £27,143 £200,620 £274,17 £27,143 £200,620 £274,17 £27	18/19 - Ba Trade Union Representation £38,930 £9,512 £48,442 £2,202 £50,644 £3.13 £3.13 £3.13 7/9 447 144 256 1.326 1.326 4.331 156 404 404 651	Sed on Schools in Financial Difficulty £120,000 £0 £120,000 £0 £120,000 £8.64 n/a n/a 1.764 1.784 1.789 4.408 1.389 9.64 4.822 1.389	CLEAPSS £1,991 £1,162 £3,153 £76 £3,229 £0.16 £0.16 £0.16 £0.16 £225.00	Statutory Accounting Functions           £25,977         £6,347           £32,324         £1,469           £33,793         £2.09           £2.09         £2.09           £2.09         £2.09           £2.09         £2.09           £2.09         £2.09           £2.09         \$2.09           £2.09         \$2.09           £2.09         \$2.09           £2.09         \$2.09           \$2.09         \$2.09           \$2.09         \$2.09           \$2.09         \$2.09           \$2.09         \$2.09           \$2.09         \$2.09           \$2.09         \$2.09           \$2.09         \$2.09           \$2.09         \$2.09           \$2.09         \$2.09           \$2.09         \$2.09           \$2.09         \$2.09           \$2.09         \$2.09           \$2.00         \$2.00           \$2.00         \$2.00           \$2.00         \$2.00           \$2.00         \$2.00           \$2.00         \$2.00           \$2.00         \$2.00           \$2.00         \$2.00	Internal Audit of Schools £34,724 £8,484 £43,209 £1,964 £45,173 £2.79 £2.79 £2.79 £2.79 £2.79 £2.79	S Data           Pension           Scheme           Administration           £25,950           £6,341           £32,291           £1,468           £2.09           £2.09           £2.09           £2.09           £2.09           £2.09           £2.09           £2.09           £2.09           £2.09           1/2	Health and Safety Support Levels 1 & 2 £128,716 £31,450 £160,166 £7,281 £167,446 £10.34 £10.34 £10.34 c10.3	Health and Safety Support Level 1 only £43,787 £10,699 £54,486 £2,477 £56,962 £3.52 £3.52 £3.52 n/a 651 503 162 288	Total Statutory and Regulatory Duties Option 1 £215,367 £52,622 £267,989 £12,182 £280,171 £17.30 £17.30 £17.30 £17.30 2,474 3,201 2,474 796	Total Statutory and Regulatory Duties Option 2 £130,438 £31,871 £162,309 £7,378 £10,48 £10,48 £10,48 £10,48 £10,48 1,049 1,499 4,499
Proposed Secondary Dedelegation           Total Proposed Dedelegation           Estimated income from other maintained schools           Total Cost of Service           Indicative cost per primary pupil           Indicative cost per secondary pupil           Indicative cost per secondary pupil           Indicative cost per secondary school           School         Pupil           Aldermaston Church of England Primary School         188           Basidon Church of England Primary School         144           Beedon Church of England Chrimary School         422           Bradfield Church of England Primary School         423           Bradfield Church of England Primary School         424           Brightw alton Church of England Primary School         100           Bringhtwalton Church of England Primary School         100           Brightw alton Church of England Primary School         200           Calcot Junior School         207           Chaddlew orth SL Andrew 's Church of England Primary School         209           Cold Ash SL Mark's Church of England Primary School         209           Cold Ash SL Mark's Church of England Primary School         209           Cold Ash SL Mark's Church of England Primary School         209           Conton Church of England Primary School         209	No's           5         7.3           3         0.0           6         3.5           2         3.3           4         7.0           2         0.0           0         0.0           0         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         4.7           7         1.2           5         0.0           3         4.7           9         4.7           5         0.0           3         4.7           9         4.7           5         0.0           9         4.7           5         0.0           0         9.2           0         9.2	Integration £174,897 £42,733 £217,630 £0 £217,630 £14.05 £14.05 £14.05 £14.05 2.009 646 1.152 5.958 1.995 1.405 703 1.813 2.923 3.222 3.921 408 2.937 2.768	Minority Support £169,085 £4,392 £173,477 £27,143 £200,620 £274,17 £274,17 £274,17 £274,17 £274,17 £274,17 8 8 9 0 9 4 6 9 911 1,989 0 9 46 9 911 1,989 0 0 946 911 1,989 0 0 0 0 0 0 0 0 0 0 0 1,226 0 0 0 0 1,226 0 0 0 1,227 0 0 0 0,000 0 0,000000	Representation £38,930 £9,512 £48,442 £2,202 £50,644 £3.13 £3.13 £3.13 7.13 £3.13 7.13 £3.13 7.13 £3.13 7.13 £3.13 7.14 7.13 7.14 7.14 7.13 7.14 7.14 7.13 7.14 7.14 7.14 7.13 7.14 7.14 7.14 7.13 7.14	Financial Difficulty £120,000 £0 £120,000 £120,000 £9,64 n/a n/a n/a 1,784 1,784 1,789 4,44 4,791 4,44 4,088 1,399 9,664	£1,991 £1,162 £3,153 £76 £3,229 £0.16 £0.16 £0.16 £225.00 Indicati 30 23 7 7 13	Accounting Functions £25,977 £6,347 £32,324 £1,469 £33,793 £2.09 £2.09 £2.09 n/a two Dedelegati 386 298 96 96	Audit of Schools £34,724 £8,484 £43,209 £1,964 £45,173 £2.79 £2.79 £2.79 62.79 n/a on for each S 516 399 399	Scheme Administration           £25,950           £6,341           £32,291           £1,468           £33,759           £2.09           £2.09           £2.09           62.09           n/a           Gervice by School           386           228           96	Safety Support Levels 18 2 £128,716 £31,450 £160,166 £7,281 £167,446 £10.34 £10.34 £10.34 £10.34 1,913 1,479 476	Safety Support Level 1 only £43,787 £10,699 £54,486 £2,477 £56,962 £3.52 £3.52 £3.52 n/a 651 503 162	and Regulatory Duties Option 1 £215,367 £52,622 £267,989 £12,182 £280,171 £17.30 £17.30 £17.30 1/3 8,17.30 £17.50 £17.50	and Regulatory Duties Option 2 £130,438 £31,871 £162,309 £7,378 £10,485 £10,485 £10
Proposed Secondary Dedelegation           Total Proposed Dedelegation           Estimated income from other maintained schools           Total Cost of Service           Indicative cost per secondary pupil           Indicative cost per other maintained school pupil           Indicative cost per secondary pupil           Indicative cost per other maintained school pupil           Fixed cost per secondary school           School         Pupil           Aldermaston Church of England Primary School         143           Beedon Church of England Primary School         422           Bradited Church of England Primary School         423           Bright copse Primary School         424           Bright watton Church of England Primary School         424           Bright watton Church of England Primary School         425           Brightwatton Church of England Primary School         426           Burghfield St. Mary's Church of England Primary School         426           Burghfield St. Mary's Church of England Primary School         200           Calcot Junior School         200           Calcot Junior School         200           Calcot Junior School         200           Calcot Junior School         200           Cald Ash St. Mark's Church of England Primary School	No's           5         7.3           3         0.0           6         3.5           2         3.3           4         7.0           2         0.0           0         0.0           0         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         4.7           7         1.2           5         0.0           3         4.7           9         4.7           5         0.0           3         4.7           9         4.7           5         0.0           9         4.7           5         0.0           0         9.2           0         9.2	£42,733 £217,630 £0 £217,630 £14.05 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<b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b>	£8,484 £43,209 £1,964 £45,173 £2.79 £2.79 £2.79 n/a on for each S 516 399 128	£6,341           £32,291           £1,468           £33,759           £2.09           £2.09           £2.09           £2.09           £2.09           £2.09           £2.09           £2.09           £2.09           £2.09           £2.09           £2.09           200           n/a           Service by Schoo           386           298           96	£128,716 £31,450 £160,166 £7,281 £167,446 £10.34 £10.34 n/a 1.913 1.479 476	£43,787 £10,699 <b>£54,486</b> £2,477 £56,962 £3.52 £3.52 £3.52 £3.52 £3.52 £3.53 £3.55 £	£52,622 £267,989 £12,182 £280,171 £17.30 £17.50	£31,871 <b>£162,309</b> £7,378 £169,687 <b>£10.48</b> £10.48 £10.48 <b>£10.48</b> <b>1.939</b> 1.499 1.499
Total Proposed Dedelegation         Image: Control of Service           Indicative cost per primary pupil         Indicative cost per secondary pupil           Indicative cost per other maintained schools         Pupil           Indicative cost per other maintained school pupil         Pupil           Indicative cost per secondary pupil         Pupil           Indicative cost per secondary school         Pupil           School         Pupil           School         Pupil           Saldermaston Church of England Primary School         143           Beedon Church of England Controlled Primary School         442           Beenham Primary School         442           Bradfield Church of England Primary School         442           Bradfield Church of England Primary School         442           Burghtwalton Church of England Primary School         442           Burghtwalton Church of England Primary School         100           Brington Church of England Primary School         200           Calcot Junior School         202           Calcot Junior School         203           Calcot Junior School         203           Calcot Junior School         203           Calcot Junior School         203           Cald Ash St. Mark'S Church of England Primary School         2	No's           5         7.3           3         0.0           6         3.5           2         3.3           4         7.0           2         0.0           0         0.0           0         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         4.7           7         1.2           5         0.0           3         4.7           9         4.7           5         0.0           3         4.7           9         4.7           5         0.0           9         4.7           5         0.0           0         9.2           0         9.2	£42,733 £217,630 £0 £217,630 £14.05 £14.05 £14.05 £14.05 2.009 646 1.152 5.958 1.995 1.405 703 1.813 2.923 3.921 408 2.937 2.768	£173,477 £27,143 £200,620 £274.17 £274.17 £274.17 £274.17 n/a 1,989 0 946 911 1,989 0 946 911 1,989 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	£9,512 £48,442 £2,202 £50,644 £3.13 £3.13 n/a 579 447 144 256 1.326 444 313 156 404	£0 £120,000 £0 £120,000 £9,000 £9,000 1,784 1,379 444 791 4,088 1,389 9,64	£1,162 £3,153 £76 £3,229 £0.16 £0.16 £225.00 Indicati 30 23 7 13 68	£6,347 <b>£32,324</b> £1,469 £33,793 <b>£2.09</b> <b>£2.09</b> <b>£2.09</b> <b>£2.09</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> 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<b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> <b>1/2</b> 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     Service by Schoo           386           298           96	£31,450 £160,166 £7,281 £167,446 £10.34 £10.34 £10.34 n/a 1.913 1.479 476	£10,699 £54,486 £2,477 £56,962 £3.52 £3.52 £3.52 £3.52 £3.52 £3.53 £3.55 £3	£267,989 £12,182 £280,171 £17.30 £17.30 £17.30 n/a 3.201 2.474 796	£31,871 £162,309 £7,378 £169,687 £1048 £1048 £1048 n/a 1,939 1,499
Estimated income from other maintained schools           Total Cost of Service           Indicative cost per sprimary pupil           Indicative cost per secondary pupil           Indicative cost per secondary pupil           Indicative cost per secondary school           School         Pupil           Aldermaston Church of England Primary School         184           Basildon Church of England Primary School         184           Beedon Church of England Primary School         442           Bradfield Church of England Primary School         144           Berdin Church of England Primary School         144           Bradfield Church of England Primary School         142           Bradfield Church of England Primary School         166           Burghfield St. Mary's Church of England Primary School         106           Burghfield St. Mary's Church of England Primary School         202           Calcot Irfant School & Nursery         203           Calcot Irfant School & Nursery         204           Cald Ash St. Mark's Church of England Primary School         100           Comide Primary School         100           Comid Ash St. Mark's Church of England Primary School         100           Comide Primary School         100           Comid Ash St. Mark's Church of England Primary School<	No's           5         7.3           3         0.0           6         3.5           2         3.3           4         7.0           2         0.0           0         0.0           0         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         4.7           7         1.2           5         0.0           3         4.7           9         4.7           5         0.0           3         4.7           9         4.7           5         0.0           9         4.7           5         0.0           0         9.2           8         0.0           0         9.2	£0 £217,630 £14.05 £14.05 £14.05 2.600 2.009 646 1.152 5.958 1.995 1.405 703 1.813 2.923 3.222 3.921 408 2.937 2.768	£27,143 £200,620 £274.17 £274.17 £274.17 £274.17 1,989 0 946 911 1,921 0 0 0 0 0 0 1,296 7,184	£2,202 £50,644 £3.13 £3.13 £3.13 £3.13 579 447 144 256 (1.326 444 313 156 (404) 404	£0 £120,000 £9.64 n/a n/a 1.784 1.379 4.44 791 4.088 1.369 964	£76 £3,229 £0.16 £0.16 £225.00 Indicati 30 23 7 7 13 68	£1,469 £33,793 £2.09 £2.09 £2.09 n/a ve Dedelegati 386 298 96 171	£1,964 £45,173 £2.79 £2.79 £2.79 n/a on for each S 516 399 128	£1,468 £33,759 £2.09 £2.09 n/a iervice by Schoo 386 298 96	£7,281 £167,446 £10.34 £10.34 £10.34 n/a 1 1.913 1,479 476	£2,477 £56,962 £3.52 £3.52 £3.52 £3.52 £3.52 5.52 n/a 651 503 162	£12,182 £280,171 £17.30 £17.30 £17.30 n/a 3,201 2,474 796	£7,378 £169,687 £10.48 £10.48 £10.48 n/a 1,939 1,939
Total Cost of Service     Indicative cost per secondary pupil       Indicative cost per secondary pupil     Indicative cost per secondary pupil       Indicative cost per secondary pupil     Indicative cost per secondary pupil       Fixed cost per secondary school     Pupil       School     Pupil       School     Pupil       School     Pupil       Besidon Church of England Primary School     143       Beenham Primary School     862       Brach Cope Primary School     442       Bradfield Church of England Primary School     442       Bradfield Church of England Aided Primary School     143       Brithon Church of England Aided Primary School     144       Brithon Church of England Primary School     142       Bradfield Church of England Primary School     142       Brithon Church of England Primary School     122       Burghfield St. Mary's Church of England Primary School     201       Calcot Jurin School & Nursery     203       Calcot Jurin School     201       Cold Ash St. Mark's Church of England Primary School     202       Chieveley Primary School     203       Cold Ash St. Mark's Church of England Primary School     204       Cold Ash St. Mark's Church of England Primary School     205       Cold Ash St. Mark's Church of England Primary School     205       Co	No's           5         7.3           3         0.0           6         3.5           2         3.3           4         7.0           2         0.0           0         0.0           0         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         4.7           7         1.2           5         0.0           3         4.7           9         4.7           5         0.0           3         4.7           9         4.7           5         0.0           9         4.7           5         0.0           0         9.2           8         0.0           0         9.2	£217,630 £14.05 £14.05 £14.05 14.05 2.600 2.009 646 1.152 5.958 1.995 1.405 703 1.813 2.923 3.232 3.921 408 2.937 2.768	£200,620 £274,17 £274,17 £274,17 £274,17 n/a 0 9496 9416 911 1,921 0 0 0 0 0 0 0 1,296 7,184	£50,644 £3.13 £3.13 £3.13 n/a 579 	£120,000 £9.64 n/a n/a 1.784 1.379 444 791 4.088 1.369 964	£3,229 £0.16 £0.16 £0.16 £225.00 Indicati 30 23 7 7 13 68	£33,793 £2.09 £2.09 £2.09 n/a ve Dedelegati 386 298 96 171	£45,173 £2.79 £2.79 £2.79 n/a on for each \$ 516 399 128	£33,759 £2.09 £2.09 £2.09 n/a service by Schoo 386 298 96	£167,446 £10.34 £10.34 £10.34 r/a 1 1.913 1,479 476	£56,962 £3.52 £3.52 £3.52 £3.52 n/a 651 503 162	£280,171 £17.30 £17.30 £17.30 n/a 3.201 2.474 796	£169,687 £10.48 £10.48 £10.48 £10.48 n/a 1,939 1,499
Indicative cost per primary pupil     Indicative cost per secondary pupil       Indicative cost per other maintained school pupil       Fixed cost per secondary school       School     Pupil       School     188       Basidon Church of England Primary School     144       Beedon Church of England Primary School     446       Berdham Primary School     144       Bridh Church of England Primary School     144       Bridh Church of England Primary School     144       Bright Ohurch of England Primary School     142       Bright Ohurch of England Primary School     142       Bright Ohurch of England Primary School     122       Burghtfield St. Marys Church of England Primary School     122       Burghtfield St. Marys Church of England Primary School     122       Chaot Jawary School & Nursery     233       Cold Ash St. Mark's Church of England Primary School     100       Down swa y Primary School     100       Corrigon Church of England Primary School     100       Cold Ash St. Mark's Church of England Primary School     100       Compton Church of England Primary School     100       Corrigon Church of England Primary School     100       Cow Jawary School     100       Cow Jawary School     100       Cow Jawary School     100       Corridge Primary Scho	No's           5         7.3           3         0.0           6         3.5           2         3.3           4         7.0           2         0.0           0         0.0           0         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         4.7           7         1.2           5         0.0           3         4.7           9         4.7           5         0.0           3         4.7           9         4.7           5         0.0           9         4.7           5         0.0           0         9.2           8         0.0           0         9.2	£14.05 £14.05 n/a n/a 2.600 2.009 646 1.152 5.958 1.995 1.405 703 1.813 2.923 3.232 3.921 408 2.937 2.768	£274.17 £274.17 £274.17 £274.17 n/a 1,989 0 946 911 1,921 0 0 0 0 0 0 0 0 0 7,184	£3.13 £3.13 £3.13 <i>n/a</i> 579 447 144 266 1.326 444 444 313 156 6 404	£9.64 n/a n/a n/a 1.784 1.379 444 791 4.088 1.369 964	£0.16 £0.16 £225.00 Indicati 30 23 7 13 68	£2.09 £2.09 £2.09 n/a ive Dedelegati 386 298 96 171	£2.79 £2.79 £2.79 n/a on for each \$ 516 399 128	£2.09 £2.09 £2.09 n/a Service by Schoo 386 298 96	£10.34 £10.34 £10.34 n/a I 1,913 1,479 476	£3.52 £3.52 £3.52 n/a 651 503 162	£17.30 £17.30 £17.30 n/a 3,201 2,474 796	£10.48 £10.48 £10.48 n/a 1,939 1,499
Indicative cost per secondary pupil           Indicative cost per other maintained school pupil           Fixed cost per secondary school           School         Pupil           School         Pupil           Basildon Church of England Pirnary School         188           Basildon Church of England Pirnary School         448           Beenham Prinary School         442           Bradfield Church of England Pirnary School         442           Bradfield Church of England Pirnary School         442           Brightw alton Church of England Pirnary School         442           Brightw alton Church of England Pirnary School         162           Burghfield St. Mary's Church of England Pirnary School         162           Burghfield St. Mary's Church of England Pirnary School         200           Calcot Junics School         227           Chaddlew orth St. Andrew 's Church of England Pirnary School         200           Compton Church of England Pirnary School         200           Cold Ash St. Mark's Church of England Pirnary School         200           Compton Church of England Pirnary School         200           Combore Onucrh of England Pirnary School         200           Cond Ash St. Mark's Church of England Pirnary School         200           Comridge Pirnary School         200<	No's           5         7.3           3         0.0           6         3.5           2         3.3           4         7.0           2         0.0           0         0.0           0         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         4.7           7         1.2           5         0.0           3         4.7           9         4.7           5         0.0           3         4.7           9         4.7           5         0.0           9         4.7           5         0.0           0         9.2           8         0.0           0         9.2	£14.05 n/a n/a 2.600 2.009 646 1.152 5.958 1.995 1.405 703 1.813 2.923 3.222 3.921 408 2.937 2.768	£274.17 £274.17 n/a 1,989 0 946 911 1,921 0 0 0 0 0 0 0 0 0 7,184	E3.13 E3.13 n/a 579 447 144 256 0.1.326 0.1.326 444 313 156 404	n/a n/a n/a 1,784 1,379 444 791 4,088 1,369 964	£0.16 £0.16 £225.00 Indicati 30 23 7 13 68	£2.09 £2.09 n/a ive Dedelegati 386 298 96 171	£2.79 £2.79 n/a on for each \$ 516 399 128	£2.09 £2.09 n/a Service by Schoo 386 298 96	£10.34 £10.34 n/a I 1.913 1.479 476	£3.52 £3.52 n/a 651 503 162	£17.30 £17.30 n/a 3,201 2,474 796	£10.48 £10.48 n/a 1,939 1,499
Indicative cost per other maintained school pupil           Fixed cost per secondary school           School         Pupil           School         Pupil           Aldermaston Church of England Primary School         142           Basidon Church of England Primary School         442           Beedon Church of England Primary School         442           Bradid Church of England Primary School         442           Bradidel Church of England Primary School         442           Brightwaton Church of England Primary School         142           Brightwaton Church of England Primary School         162           Burghfield St. Mark's Church of England Primary School         203           Calcot Irfant School & Nursery         203           Calcot Irfant School & Nursery         203           Calcot Irfant School & Nursery         203           Cold Ash St. Mark's Church of England Primary School         168           Curridge Primary School         100           Compton Church of England Primary School         100           Curridge Primary School         200           Falkand Primary School         404           Francis Baily Primary School         204           Francis Baily Primary School         405           Francis Baily Primary School	No's           5         7.3           3         0.0           6         3.5           2         3.3           4         7.0           2         0.0           0         0.0           0         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         4.7           7         1.2           5         0.0           3         4.7           9         4.7           5         0.0           3         4.7           9         4.7           5         0.0           9         4.7           5         0.0           0         9.2           8         0.0           0         9.2	n/a n/a 2,600 2,009 6,46 1,152 5,958 1,995 1,405 703 1,813 2,923 3,222 3,921 4,00 2,937 2,768	£274.17 n/a 1.989 0 946 911 1.921 0 0 0 0 0 0 0 0 1.296 7.184	E3.13 n/a 579 447 144 256 1.326 444 313 156 404	n/a n/a 1,784 1,379 444 791 4,088 1,369 964	£0.16 £225.00 Indicati 30 23 7 13 68	£2.09 n/a ive Dedelegati 386 298 96 171	£2.79 n/a on for each S 516 399 128	£2.09 n/a Service by Schoo 386 298 96	£10.34 n/a I 1,913 1,479 476	£3.52 n/a 651 503 162	£17.30 n/a 3,201 2,474 796	£10.48 n/a 1,939 1,499
Fixed cost per secondary school         Pupili           School         Pupili           Aldermaston Church of England Primary School         144           Beasidon Church of England Primary School         144           Beenham Primary School         144           Beenham Primary School         262           Bradfield Church of England Controlled Primary School         442           Bradfield Church of England Primary School         144           Brightw atton Church of England Primary School         144           Brightw atton Church of England Primary School         100           Burghtrield St. Mary's Church of England Primary School         203           Calcot Jinan School & Nursery         233           Calcot Jinan School & Nursery         233           Calcot Jinan School & Nursery         204           Calcot Jinan School         107           Compton Church of England Primary School         109           Compton Church of England Primary School         109           Compton Church of England Primary School         200           Chieveley Primary School         200           Compton Church of England Primary School         205           Endome Primary School         205           Endome Primary School         206           E	No's           5         7.3           3         0.0           6         3.5           2         3.3           4         7.0           2         0.0           0         0.0           0         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         4.7           7         1.2           5         0.0           3         4.7           9         4.7           5         0.0           3         4.7           9         4.7           5         0.0           9         4.7           5         0.0           0         9.2           8         0.0           0         9.2	n/a 2.600 2.009 646 1.152 5.958 1.995 1.405 703 1.813 2.923 3.232 3.821 408 2.937 2.768	n/a 1,989 0 946 911 1,921 0 0 0 0 1,296 7,184	n/a 579 447 144 2256 1,326 444 313 3156 404	n/a 1,784 1,379 444 791 4,088 1,369 964	£225.00 Indicati 30 23 7 13 68	n/a ive Dedelegati 386 298 96 171	n/a on for each S 516 399 128	n/a Service by Schoo 386 298 96	n/a I 1,913 1,479 476	n/a 651 503 162	n/a 3,201 2,474 796	n/a 1,939 1,499
School         No's           Aldermaston Church of England Pimary School         188           Basildon Church of England Pimary School         143           Beedon Church of England Controlled Pimary School         442           Brach Copse Pimary School         422           Bradfield Church of England Pimary School         422           Bradfield Church of England Pimary School         422           Bradfield Church of England Pimary School         422           Brightw alton Church of England Pimary School         100           Brightw alton Church of England Pimary School         102           Burghfield St. Mary's Church of England Pimary School         200           Calcot Junior School         207           Chaddlew orth St. Andrew 's Church of England Pimary School         208           Cold Ash St. Mark's Church of England Pimary School         209           Cold Ash St. Mark's Church of England Pimary School         209           Compton Church of England Pimary School         209           Compton Church of England Pimary School         209           Chieveley Pimary School         209           Compton Church of England Pimary School         209           Chievelay Pimary School         209           Charles Bily Pimary School         209           Franc	No's           5         7.3           3         0.0           6         3.5           2         3.3           4         7.0           2         0.0           0         0.0           0         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         4.7           7         1.2           5         0.0           3         4.7           9         4.7           5         0.0           3         4.7           9         4.7           5         0.0           9         4.7           5         0.0           0         9.2           8         0.0           0         9.2	2,009 646 1,152 5,958 1,995 1,405 703 1,813 2,923 3,232 3,232 3,921 408 2,937 2,768	0 946 911 1,921 0 0 0 0 1,296 7,184	447 144 256 1,326 444 313 156 404	1,379 444 791 4,088 1,369 964	30 23 7 13 68	386 298 96 171	516 399 128	386 298 96	1,913 1,479 476	503 162	2,474 796	1,499
Basidon Church of England Primary School       143         Beedon Church of England Controlled Primary School       444         Benham Primary School       442         Bradfield Church of England Primary School       144         Brich Copse Primary School       144         Brich Copse Primary School       144         Brich Copse Primary School       144         Bright alton Church of England Primary School       100         Brington Church of England Primary School       102         Burghfield St. Mary's Church of England Primary School       203         Calcot Irfant School & Nursery       203         Corridge Primary School       103         Corridge Primary School       103         Curridge Primary School       204         Francis Baily Primary School       <	3         0.0           6         3.5           2         3.3           4         7.0           2         0.0           0         0.0           0         0.0           0         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           0         4.7           9         4.7           9         0.0           0         0.0           0         0.0           0         0.0	2,009 646 1,152 5,958 1,995 1,405 703 1,813 2,923 3,232 3,232 3,921 408 2,937 2,768	0 946 911 1,921 0 0 0 0 1,296 7,184	447 144 256 1,326 444 313 156 404	1,379 444 791 4,088 1,369 964	23 7 13 68	298 96 171	399 128	298 96	1,479 476	503 162	2,474 796	1,499
Beedon Church of England Controlled Primary School         46           Beenham Primary School         86           Brich Copse Primary School         422           Brich Copse Primary School         142           Bright walton Church of England Aided Primary School         142           Bright walton Church of England Primary School         100           Brimbon Church of England Primary School         122           Burdhebury Church of England Primary School         200           Calcot Jinfant School & Nursery         203           Calcot Jinfant School & Nursery         203           Calcot Jinfant School & Nursery         203           Calcot Jinfant School         207           Chaddlew orth SL Andrew 's Church of England Primary School         207           Cold Ash SL Mark's Church of England Primary School         209           Cold Ash SL Mark's Church of England Primary School         209           Compton Church of England Primary School         200           Cold Ash SL Mark's Church of England Primary School         200           Caurdige Primary School         200           Englefield Church of England Primary School         200           Englang Primary School         201           Hampstead Norreys Church of England Primary School         201 <t< td=""><td>6         3.5           2         3.3           4         7.0           2         0.0           0         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         4.7           7         1.2           5         0.0           8         4.7           9         4.7           5         0.0           8         0.0           0         9.2</td><td>646 1,152 5,958 1,995 703 1,813 2,923 3,232 3,921 408 2,937 2,768</td><td>946 911 1,921 0 0 0 0 0 1,296 7,184</td><td>144 256 1,326 444 313 156 404</td><td>444 791 4,088 1,369 964</td><td>7 13 68</td><td>96 171</td><td>128</td><td>96</td><td>476</td><td>162</td><td>796</td><td></td></t<>	6         3.5           2         3.3           4         7.0           2         0.0           0         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         4.7           7         1.2           5         0.0           8         4.7           9         4.7           5         0.0           8         0.0           0         9.2	646 1,152 5,958 1,995 703 1,813 2,923 3,232 3,921 408 2,937 2,768	946 911 1,921 0 0 0 0 0 1,296 7,184	144 256 1,326 444 313 156 404	444 791 4,088 1,369 964	7 13 68	96 171	128	96	476	162	796	
Beenham Primary School         88           Birch Copse Primary School         422           Bradfield Church of England Primary School         142           Brightw alton Church of England Primary School         100           Brimption Church of England Primary School         100           Brimption Church of England Primary School         200           Burghfield St. Mary's Church of England Primary School         200           Calcot Hrant School & Nursery         233           Calcot Junior School         207           Chaddleworth St. Andrew 's Church of England Primary School         200           Cold Ash St. Mark's Church of England Primary School         200           Cold Ash St. Mark's Church of England Primary School         200           Compton Church of England Primary School         200           Compton Church of England Primary School         100           Dow nsw ay Primary School         100           Dow nsw ay Primary School         66           Englefield Church of England Primary School         66           Englefield Church of England Primary School         64           Garland Junior School         203           Fanklaand Primary School         204           Harmstead Norreys Church of England Primary School         54           Harmstead Nor	2         3.3           4         7.0           2         0.0           0         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         16.0           9         4.7           7         1.2           5         0.0           3         4.7           9         4.7           5         0.0           8         0.0           9         4.7           9         4.7           9         4.7           9         4.7           9         4.7           9         4.7           9         4.7           9         4.7           9         4.7           9         4.7           9         4.7           9         4.7           9         4.7           9         4.7           9         4.7           9         <	1,152 5,958 1,995 1,405 703 1,813 2,923 3,232 3,921 408 2,937 2,768	911 1,921 0 0 0 0 1,296 7,184	256 1,326 444 313 156 404	791 4,088 1,369 964	13 68	171						
Birch Copse Primary School         422           Bradfield Church of England Primary School         143           Brightw alton Church of England Primary School         100           Brimpton Church of England Primary School         125           Burghfield St. Mary's Church of England Primary School         223           Calcot Infant School & Nursery         223           Calcot Junior School         275           Chaddew orth St. Andrew 's Church of England Primary School         203           Colid Ash St. Mark's Church of England Primary School         100           Chieveley Primary School         100           Colid Ash St. Mark's Church of England Primary School         103           Corridge Primary School         100           Curridge Primary School         200           Enborne Church of England Primary School         103           Curridge Primary School         200           Enborne Church of England Primary School         200           Enborne Church of England Primary School         200           Englefield Church of England Primary School         200           Francis Baily Primary School         201           Francis Baily Primary School         202           Francis Baily Primary School         203           Hermitage Primary School <td< td=""><td>4         7.0           2         0.0           0         0.0           0         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         16.0           9         4.7           7         1.2           5         0.0           3         4.7           9         4.7           7         1.2           5         0.0           8         0.0           9         4.7           9         4.7           9         4.7           9         4.7           0         9           0         9           0         9           0         9</td><td>5,958 1,995 1,405 703 1,813 2,923 3,232 3,921 408 2,937 2,768</td><td>1,921 0 0 0 0 1,296 7,184</td><td>1,326 444 313 156 404</td><td>4,088 1,369 964</td><td>68</td><td></td><td></td><td></td><td></td><td></td><td>1,419</td><td>482 859</td></td<>	4         7.0           2         0.0           0         0.0           0         0.0           9         0.0           9         0.0           9         0.0           9         0.0           9         16.0           9         4.7           7         1.2           5         0.0           3         4.7           9         4.7           7         1.2           5         0.0           8         0.0           9         4.7           9         4.7           9         4.7           9         4.7           0         9           0         9           0         9           0         9	5,958 1,995 1,405 703 1,813 2,923 3,232 3,921 408 2,937 2,768	1,921 0 0 0 0 1,296 7,184	1,326 444 313 156 404	4,088 1,369 964	68						1,419	482 859
Brightw alton Church of England Aided Primary School     100       Brimpton Church of England Primary School     300       Bucklebury Church of England Primary School     122       Burghfield St. Mary's Church of England Primary School     200       Calcot Junics School     227       Chaddlew orth St. Andrew 's Church of England Primary School     200       Cold Ash St. Mark's Church of England Primary School     200       Cold Ash St. Mark's Church of England Primary School     200       Compton Church of England Primary School     200       Compton Church of England Primary School     100       Dow nsw ay Primary School     100       Dow nsw ay Primary School     200       Fankland Primary School     200       Fancis Bally Primary School     200       Fancis Bally Primary School     66       Englefield Church of England Primary School     64       Garland Junior School     201       Harmstead Norreys Church of England Primary School     54       Garland Junior School     300       Hermitage Primary School     300       Hungerford Primary School     300       The Isleys' Primary School     300       Horgen Primary School     300       Hungerford Primary School     300       Horgen Primary School     300       Hopen Primary School <td>0         0.0           0         0.0           9         0.0           8         4.7           0         26.2           9         16.0           9         0.0           9         4.7           7         1.2           5         0.0           3         4.7           9         4.7           5         0.0           8         0.0           0         9.2</td> <td>1,405 703 1,813 2,923 3,232 3,921 408 2,937 2,768</td> <td>0 0 0 1,296 7,184</td> <td>313 156 404</td> <td>964</td> <td>23</td> <td>885</td> <td>1,183</td> <td>884</td> <td>4,385</td> <td>1,492</td> <td>7,337</td> <td>4,444</td>	0         0.0           0         0.0           9         0.0           8         4.7           0         26.2           9         16.0           9         0.0           9         4.7           7         1.2           5         0.0           3         4.7           9         4.7           5         0.0           8         0.0           0         9.2	1,405 703 1,813 2,923 3,232 3,921 408 2,937 2,768	0 0 0 1,296 7,184	313 156 404	964	23	885	1,183	884	4,385	1,492	7,337	4,444
Brimpton Church of England Primary School         50           Bucklebury Church of England Primary School         122           Burghfield St. Mary's Church of England Primary School         200           Calcot Irfant School & Aursery         233           Calcot Junior School         277           Chaddlew orth St. Andrew 's Church of England Primary School         200           Cold Ash St. Andrew 's Church of England Primary School         200           Cold Ash St. Mark's Church of England Primary School         100           Compton Church of England Primary School         100           Down sway Primary School         200           Enderlied Church of England Primary School         66           Englefield Church of England Primary School         66           Francis Baily Primary School         64           Garland Junior School         201           Hampstead Norreys Church of England Primary School         203           Hampstead Norreys Church of England Primary School         204           Humgerford Primary School         203           The Isleys' Primary School         303           The Isleys' Primary School         304           Inken Primary School         303           The Isleys' Primary School         304           John Rankin Infant & Nursery Scho	0         0.0           9         0.0           8         4.7           0         26.2           9         16.0           9         0.0           9         4.7           7         1.2           5         0.0           3         4.7           9         4.7           5         0.0           8         0.0           0         9.2	703 1,813 2,923 3,232 3,921 408 2,937 2,768	0 0 1,296 7,184	156 404			296	396	296	1,469	500	2,457	1,488
Bucklebury Church of England Primary School         123           Burghfield St. Mary's Church of England Primary School         200           Calcot Infant School & Nursery         233           Calcot Junior School         277           Chadlew orth St. Andrew's Church of England Primary School         203           Chadlew orth St. Andrew's Church of England Primary School         200           Cold Ash St. Wark's Church of England Primary School         193           Compton Church of England Primary School         100           Dwn nsw ay Primary School         200           Enborne Church of England Primary School         66           Englefield Church of England Primary School         66           Englefield Church of England Primary School         64           Francis Baily Primary School         64           Garland Junior School         201           Hermitage Primary School         199           Hungerford Primary School         199           Hungerford Primary School         199           Hungerford Primary School         205           John Rankin Infant & Nursery School         271           John Rankin Infant & Nursery School         272           John Rankin Infant & Nursery School         276           John Rankin Infant & Nursery School         <	9         0.0           8         4.7           0         26.2           9         16.0           9         16.0           9         16.0           9         4.7           7         1.2           5         0.0           3         4.7           9         4.7           5         0.0           8         0.0           0         9.2	1,813 2,923 3,232 3,921 408 2,937 2,768	0 1,296 7,184	404		16 8	209 104	279 140	209 104	1,034 517	352 176	1,730 865	1,048 524
Calcot Infant School & Nursery     230       Calcot Junior School     277       Chaddlew orth St. Andrew 's Church of England Primary School     200       Cold Ash St. Mark's Church of England Primary School     200       Cold Ash St. Mark's Church of England Primary School     103       Compton Church of England Primary School     200       Corridge Primary School     103       Dow nsw ay Primary School     200       Enborne Church of England Primary School     200       Enderlied Church of England Primary School     69       Englefield Church of England Primary School     64       Garland Junior School     201       Hampstead Norreys Church of England Primary School     201       Hermitage Primary School     201       Hungerford Primary School     201       Inken Primary School     303       The Isleys' Primary School     303       The Isleys' Primary School     206       John Rankin Infant & Nursery School     206       John Rankin Infant & Nursery School     206       John Rankin Infant & Nursery School     206       Kennet Valley Primary School     206       John Rankin Infant & Nursery School     206       John Rankin Mirant & Nursery School     206       John Rankin Mirant & Nursery School     206       Kennet Valley Primary Sc	0         26.2           9         16.0           9         0.0           9         4.7           7         1.2           5         0.0           3         4.7           5         0.0           8         0.0           9         4.7	3,232 3,921 408 2,937 2,768	7,184	651	1,244	21	269	360	269	1,334	454	2,232	1,352
Calcot Junior School         275           Chaddlew orth St. Andrew's Church of England Primary School         200           Chieveley Primary School         200           Cold Ash St. Mark's Church of England Primary School         193           Compton Church of England Primary School         193           Curridge Primary School         100           Dow nsw ay Primary School         200           Endberdel Church of England Primary School         66           Englefield Church of England Primary School         465           Francis Baily Primary School         454           Harnhage Alumior School         201           Hernitage Primary School         454           Francis Baily Primary School         454           Hernitage Primary School         201           Humperford Primary School         194           Hungerford Primary School         393           The listey's Primary School         393           The listey's Primary School         304           John Rankin Junior School         266           John R	9 16.0 9 0.0 9 4.7 7 1.2 5 0.0 3 4.7 9 4.7 9 4.7 5 0.0 8 0.0 0 9.2	3,921 408 2,937 2,768			2,005	33	434	580	434	2,151	732	3,599	2,180
Chaddlew orth St. Andrew's Church of England Primary School       200         Chieveley Primary School       200         Cord Ash St. Marks Church of England Primary School       199         Compton Church of England Primary School       100         Daw nsw ay Primary School       100         Dow nsw ay Primary School       66         Endperied Church of England Primary School       66         Englefield Church of England Primary School       66         Failkand Primary School       64         Francis Baily Primary School       54         Garland Junior School       201         Hermitage Primary School       64         Hermitage Primary School       64         Integretord Primary School       64         Integretord Primary School       70         Hungerford Primary School       393         The Isleys' Primary School       56         John Rankin Infant & Nursery School       200         John Rankin Infant & Nursery School       200         John Rankin Infant & Nursery School       200         Kennet Valley Primary School       200         Kennet Valley Primary School       200         Kintbury St. Mary's Church of England Primary School       199	9 0.0 9 4.7 7 1.2 5 0.0 3 4.7 9 4.7 9 4.7 5 0.0 8 0.0 0 9.2	408 2,937 2,768	4,387	719	2,218	37	480	642	480	2,379	809	3,980	2,410
Chieveley Primary School     203       Cold Ash St. Mark's Church of England Primary School     193       Compton Church of England Primary School     184       Curridge Primary School     100       Dow nsw ay Primary School     200       Enborne Church of England Primary School     200       Enborne Church of England Primary School     200       Enborne Church of England Primary School     64       Englefield Church of England Primary School     450       Francis Baily Primary School     450       Hampstead Norreys Church of England Primary School     207       Hermitage Primary School     207       Hungerford Primary School     303       The Isleys' Primary School     303       The Isleys' Primary School     77       John Rankin Hant & Nursery School     266       John Rankin Hant & Nursery School     286       Kennet Valley Primary School     286       John Rankin Junior School     286       Kennet Valley Primary School     286       John Rankin Hant & Nursery School     286       John Sthool     286       Kennet Valley Primary School     286       John Sthool     286       Kintbury St. Mary's Church of England Primary School     140	9 4.7 7 1.2 5 0.0 3 4.7 9 4.7 5 0.0 8 0.0 0 9.2	2,937 2,768	0	873 91	2,690 280	45 5	582 61	778 81	582 60	2,885 300	982 102	4,828 502	2,924 304
Compton Church of England Primary School         188           Curridge Primary School         100           Down swa ya Primary School         200           Enborne Church of England Primary School         68           Englefield Church of England Primary School         68           Frankis Baily Primary School         54           Garland Junior School         211           Hampstead Norreys Church of England Primary School         88           Hernitage Primary School         393           The Isleys' Primary School         393           The Isleys' Primary School         77           John Rankin Junior School         77           John Rankin Junior School         260           John Rankin Junior School         260           John Rankin Junior School         270           John Rankin Junior School         260           John Rankin Shursery School         260           John Rankin Junior School         286           Kintbury St. Mary's Church of England Primary School         214           Kintbury St. Mary's Church of England Primary School         144	5 0.0 3 4.7 9 4.7 5 0.0 8 0.0 0 9.2		1,280	654	2,015	33	436	583	436	2,161	735	3,617	2,190
Curridge Primary School     103       Downsw ay Primary School     205       Enborne Church of England Primary School     645       Faglefield Church of England Primary School     645       Faikland Primary School     544       Garland Junior School     544       Hampstead Norreys Church of England Primary School     644       Hermitage Primary School     644       Hermitage Primary School     68       Hermitage Primary School     303       The Isleys' Primary School     76       John Rankin Infant & Nursery School     266       John Rankin Infant & Nursery School     286       Kennet Valley Primary School     194       Kinbury St. Mary's Church of England Primary School     216       John Rankin Junior School     206       John Rankin Yanior School     216       Kinbury St. Mary's Church of England Primary School     144	3 4.7 9 4.7 5 0.0 8 0.0 0 9.2		322	616	1,899	32	411	550	411	2,037	693	3,409	2,065
Downsway Primary School         205           Enborne Church of England Primary School         66           Englefield Church of England Primary School         99           Falkand Primary School         450           Francis Baily Primary School         64           Hampstead Norreys Church of England Primary School         211           Hampstead Norreys Church of England Primary School         393           Hungerford Primary School         393           The lisleys' Primary School         55           John Rankin Infant & Nursery School         266           John Rankin Junior School         266           John Rankin Junior School         266           Honger Primary School         393           The lisleys Primary School         266           John Rankin Junior School         266           John School         266           John Strakin Junior School         266           Kintbury St. Mary's Church of England Primary School         144	9 4.7 5 0.0 8 0.0 0 9.2	2,600 1,447	0 1,284	579 322	1,784	30 16	386 215	516 287	386 215	1,913 1,065	651 362	3,201 1,782	1,939 1,079
Englefield Church of England Primary School     98       Falkland Primary School     450       Francis Bally Primary School     543       Garland Junior School     211       Hampstead Norreys Church of England Primary School     88       Hermitage Primary School     393       Fin Lisleys "Primary School     393       John Rankin Infant & Nursery School     76       John Rankin Infant & Nursery School     260       Kennet Valley Primary School     199       Kinbury St. Mary's Church of England Primary School     260       Kinbury St. Mary's Church of England Primary School     140	B 0.0 D 9.2	2,937	1,280	522 654	2,015	33	436	583	436	2,161	735	3,617	2,190
Faikland Primary School     450       Francis Baily Primary School     543       Garland Junior School     211       Hampstead Norreys Church of England Primary School     88       Hermitage Primary School     393       The Isleys' Primary School     393       John Rankin Hrant & Nursery School     266       John Rankin Infant & Nursery School     286       Kennet Valley Primary School     194       Kinbury SL     266       John Rankin Junior School     286       Kinbury SL, Mary's Church of England Primary School     194	0 9.2	913	0	203	627	10	136	181	136	672	229	1,125	681
Francis Baily Primary School     543       Garland Junior School     201       Hampstead Norreys Church of England Primary School     88       Hermitage Primary School     199       Hungerford Primary School     393       The Isleys' Primary School     56       John Rankin Junior School     266       John Rankin Infant & Nursery School     266       John Rankin Junior School     286       Kennet Valley Primary School     194       Kintbury St. Mary's Church of England Primary School     144		1,377 6,324	0 2,524	307 1,408	945 4,339	16 72	205 939	273 1,256	204 938	1,014 4,654	345 1,583	1,696 7,787	1,027 4,716
Garland Junior School     217       Hampstead Norreys Church of England Primary School     88       Hermitage Primary School     199       Hungerford Primary School     390       The Isleys' Primary School     56       Inkpen Primary School     76       John Rankin Infant & Nursery School     260       John Rankin Junior School     286       Kennet Valley Primary School     199       Kintbury St. Mary's Church of England Primary School     140	3 16.2	7,630	4,435	1,408	4,339	87	1,133	1,250	1,132	4,654 5,616	1,565	9,396	5,691
Hermitage Primary School     199       Hungerford Primary School     393       The Isleys' Primary School     555       Inkpen Primary School     76       John Rankin Afant & Nursery School     266       John Rankin Junior School     286       Kennet Valley Primary School     199       Kinbury St. Mary's Church of England Primary School     140		3,049	1,919	679	2,092	35	453	605	452	2,244	763	3,755	2,274
Hungerford Primary School     393       The Isleys' Primary School     56       Inken Primary School     77       John Rankin Infant & Nursery School     260       John Rankin Junior School     280       Kennet Valley Primary School     199       Kinbury SL, Mary's Church of England Primary School     144		1,237	0	275	848	14	184	246	183	910	310	1,523	922
The Isleys' Primary School     56       Inkpen Primary School     77       John Rankin Infant & Nursery School     260       John Rankin Junior School     280       Kennet Valley Primary School     194       Kinbury St. Mary's Church of England Primary School     140		2,754 5,523	1,599 4,463	613 1,229	1,890 3,789	31 63	409 820	547 1,096	409 819	2,027 4,064	690 1,383	3,392 6,801	2,054 4,119
John Rankin Infant & Nursery School 260 John Rankin Junior School 280 Kennet Valley Primary School 199 Kinbury SL Mary's Church of England Primary School 140		815	0	181	559	9	121	162	121	600	204	1,004	608
John Rankin Junior School 288 Kennet Valley Primary School 194 Kintbury St. Mary's Church of England Primary School 140		1,068	285	238	733	12	159	212	158	786	267	1,315	797
Kennet Valley Primary School         19           Kintbury St. Mary's Church of England Primary School         14		3,654 3,935	11,881 2,476	813 876	2,507 2,700	42 45	543 584	725 781	542 584	2,689 2,896	915 985	4,499 4,845	2,725 2,934
		2,726	4,304	607	1,870	31	405	541	404	2,006	683	3,357	2,033
Lambourn Church of England Primary School 194		1,967	352	438	1,350	22	292	391	292	1,448	493	2,423	1,467
Long Lane Primary School 208		2,754 2,923	3,672 961	613 651	1,890 2,005	31 33	409 434	547 580	409 434	2,027 2,151	690 732	3,392 3,599	2,054 2,180
Mortimer St. Johns Church of England Infant School 182		2,523	832	569	1,755	29	380	508	379	1,882	640	3,149	1,907
Mortimer St. Mary's Church of England Junior School 210		3,035	1,097	676	2,083	35	451	603	450	2,234	760	3,738	2,264
Mrs. Bland's Infant & Nursery School 170		2,389	2,913	532	1,639	27	355	474	354	1,758	598	2,942	1,782
Pangbourne Primary School 205 Parsons Down Infant School 217		2,881 3,049	2,569 3,570	641 679	1,977 2,092	33 35	428 453	572 605	427 452	2,120 2,244	721	3,547 3,755	2,148 2,274
Parsons Down Junior School 308		4,328	548	963	2,970	49	643	859	642	3,185	1,084	5,330	3,228
Purley Church of England Infants School 112		1,574	1,583	350	1,080	18	234	312	234	1,158	394	1,938	1,174
Robert Sandilands Primary School & Nursery         250           Shaw -cum-Donnington Church of England Primary School         95	~~~~~~	3,513 1,335	6,664 965	782 297	2,410 916	40 15	522 198	698 265	521 198	2,585 982	880 334	4,326 1,644	2,620 996
Shefford Church of England Primary School 25		408	0	91	280	5	61	81	60	300	102	502	304
Springfield Primary School 30*		4,230	4,798	942	2,902	48	628	840	628	3,113	1,059	5,209	3,155
Spurcroft Primary School 433 St. Finian's Catholic Primary School 197		6,085 2,768	4,287 1,941	1,354 616	4,175 1,899	69 32	904 411	1,208 550	903 411	4,478 2,037	1,523	7,493 3,409	4,538 2,065
St. John the Evangelist Infant & Nursery School 180		2,768	6,169	563	1,099	29	376	502	375	1,862	633	3,409	2,065
St. Joseph's Catholic Primary School 210		2,951	15,034	657	2,025	34	438	586	438	2,172	739	3,634	2,201
St. Nicolas Church of England Junior School 256 St. Pauls Catholic Primary School 325		3,626	4,113	807	2,488	41	538	720 907	538	2,668	908 1,143	4,464 5,624	2,704 3,406
St. Pauls Catholic Primary School 325 Stockcross Church of England Primary School 10		4,567 1,419	5,074 652	1,017 316	3,134 974	52 16	678 211	907 282	678 211	3,361 1,045	1,143	5,624 1,748	3,406 1,059
Streatley Church of England Voluntary Controlled Primary So	9 3.5	1,391	969	310	955	16	207	276	206	1,024	348	1,713	1,038
Sulhamstead and Ufton Nervet Church of England Voluntary 10		1,419	0	316	974	16	211	282	211	1,045	355	1,748	1,059
Thatcham Park Church of England Primary School 388 Theale Church of England Primary School 275		5,410 3,864	5,087 5,027	1,204 860	3,712 2,651	62 44	804 574	1,074 767	803 573	3,982 2,844	1,354 967	6,662 4,759	4,035 2,882
Welford and Wickham Church of England Primary School 94		3,864 1,321	5,027 0	294	2,651	44 15	574 196	262	573 196	2,044 972	331	4,759	2,002 985
Westw ood Farm Infant School 172	2 8.9	2,417	2,439	538	1,658	28	359	480	359	1,779	605	2,976	1,803
Westw ood Farm Junior School 215 The Willow s Primary School 344		3,077 4,834	2,144 13,284	685 1,076	2,112 3,317	35 55	457 718	611 960	457 717	2,265 3,558	770 1,210	3,790 5,953	2,295 3,605
The Winchcombe School 39'		4,834 5,495	13,284	1,076	3,317 3,770	55 63	816	1,091	815	3,558 4,044	1,210	5,953 6,766	4,098
Woolhampton Church of England Primary School 92	2 0.0	1,293	0	288	887	15	192	257	192	951	324	1,592	964
Yattendon Church of England Primary School 73	3 0.0	1,026	0	228	704	12	152	204	152	755	257	1,263	765
The Dow ns School 898	8 3.0	12,619	823	2,809		369	1,874	2,505	1,872	9,287	3,159	15,539	9,411
Little Heath School 1,281	1 8.0	18,001	2,197	4,007		430	2,674	3,574	2,671	13,248	4,507	22,167	13,425
The Willink School 862		12,113 174,897	1,372	2,696	400.000	363	1,799	2,405	1,797	8,915	3,033	14,916	9,034
PRIMARY TOTAL 12,446 SECONDARY TOTAL 3,044	1 16	42,733	169,085 4,392	38,930 9,512	120,000 0	1,991 1,162	25,977 6,347	34,724 8,484	25,950 6,341	128,716 31,450	43,787 10,699	215,367 52,622	130,438 31,871
TOTAL ALL PRIMARY AND SECONDARY SCHOOLS 15,487	7 633	217,630	173,477	48,442	120,000	3,153	32,324	43,209	32,291	160,166	54,486	267,989	162,309
Other Maintained Schools Hungerford Nursery 115	5 7.0	n/a	1,919	360	n/a	n/a	240	321	240	1,189	405	1,990	1,205
Victoria Park Nursery 113		n/a	12,338	353	n/a	n/a	236	315	236	1,169	398	1,955	1,184
Brookfields Special School 225		n/a	10,144	704	n/a	36	470	628	469	2,327	792	3,893	2,358
The Castle Special School 162 Alternative Curriculum Service 45		n/a n/a	2,742 0	507 141	n/a n/a	26 7	338 94	452 126	338 94	1,675 465	570 158	2,803 779	1,698 472
Alternative Curriculum Service 45 Reintegration Service 44		n/a n/a	0	141 138	n/a n/a	7	94 92	126 123	94 92	465 455	158 155	779 761	472 461
Total for All Other Maintained Schools 704 Total all Maintained Schools 16,191	4 99.0	0	27,143	2,202 50,644	0	76	1,469 33,793	1,964 45,173	1,468 33,759	7,281	2,477 56,962	12,182 280,171	7,378

## West Berkshire Council Maintained Schools

### **Proposal to De-Delegate Formula Funding 2018-19**

### **Behaviour Intervention Service**

#### **Outline of Proposed Service 2018/19**

The Behaviour Intervention Team (BIT) offers evidence-based advice and support to schools. The type of involvement includes whole school support, staff training, staff support, class or year group support as well as individual support. This tiered service represents an enhanced offer from previous years.

#### Key Features Requested by Primary Heads

These themes stem from the behaviour review and will be addressed by BIT in 2018/19:

- 1. Provide a quick and flexible response to challenging cases in schools.
- 2. Provide different levels of response within the team.
- 3. Design and deliver a training package to skill up staff within schools
- 4. Set up support network for school staff.
- 5. Work with partners to ensure appropriate parent training is available.
- 6. Provide practice guidelines/ graduated response criteria.

#### A New look Team

 The Team – Beth Cartwright (BIT Manager & Acting Senior EP) Kate Pike (BIT EP) Gerry Heaton (Primary BIT Advisor) Vacant (Secondary BIT Advisor –to be appointed) Nicky Edwards (BIT Worker) 2 Vacant BIT Worker posts (in the process of being recruited this month) Andy Cordell (Exclusions Officer) Piyush Bharania (Admin Assistant)

In addition to the above, schools will have access to a team of educational psychologists and graphic facilitators who will run circle of adult meetings to support schools with pupils at risk of exclusion. A Circle of Adults meeting is led by 2 trained workers and involves key staff and professionals from the school. It lasts 90 minutes and provides a structured approach to problem-solving and identifying agreed strategies.

This represents an increased offer with a range of professionals and expertise in the team. This will be delivered without a significant increase in the cost of the

service. This is due to a team restructure and a more efficient deployment of resources.

- 2. Rapid Response: capacity to respond rapidly to school concerns. This could relate to children but also whole school situations that arise. Behaviour would be main focus but wouldn't exclude other complex situations.
- 3. For those needing some quick advice, signposting, or consultation with a BIT Educational Psychologist, Kate or Beth will be available for a telephone consultation on Wednesday afternoons from 1230 1630.
- 4. BIT 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 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 look 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 should be able to link and sit neatly with Local Authority social and emotional mental Health and well-being agenda and restorative themes.
- 8. Research indicates that a number of children and young people presenting with challenging behaviour have unidentified mental health problems. New request for involvement forms have been created along with screening tools to identify any mental health problems. This will enable these needs to be addressed by BIT team members or for referrals to be made to appropriate services.

#### What would schools get?

- 1. Screening and signposting for identified mental health difficulties.
- 2. Immediate write up and actions as well as agreed review of cases where appropriate.
- 3. Links with other support services and help in securing necessary actions
- 4. More direct support with very complex cases involving a wide range of services.
- 5. Access to support for challenging whole school situations through advisors with senior level management experience and experienced educational psychologists.
- Direct links into PAR (Pupils at Risk of exclusion mtg), PPP (Pupil Placement Panel & Fair Access process), VCF (Vulnerable Children's Fund) and other relevant systems/services
- 7. Support from workers where appropriate to help implement/model strategies in school.

- 8. Clear information of key personnel and agencies within West Berkshire –regularly updated.
- 9. Suggestions and links regarding potential training needs
- 10. Access to circle of adults meetings facilitated by an educational psychologist and another skilled worker for pupils at risk of permanent exclusion.

#### Proposed Cost of Delivery in 2018/19

The following table summarises the proposed cost of the service for 2017/18. It is based on employing the team members outlined above.

	2017/18 £	2018/19 Proposed £	% Increase
Staffing Costs	198,460	203,230	
Other Costs	6,150	6,150	
Support Service Recharges	19,400	20,940	
Total Cost	224,010	230,320	2.8%
Less Surplus Brought Forward	- 10,640	- 12,690	
Amount to be De-Delegated	213,370	217,630	2.0%

The overall cost of delivering the service has increased by 2.8% which takes into account the proposed changes to the staffing structure of the team outlined above together with the expected April 2018 pay award and salary increments due to existing staff. However, as the service spent £12,690 below the amount agreed to be de-delegated in 2016/17, this amount can be used to help meet the cost of delivering the service in 2018/19. As the underspend in 2016/17 was slightly higher than in 2015/18, the amount proposed to be de-delegated in 2018/19 is therefore 2% higher than in 2017/18.

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 2018/19

The total net cost of the service will be divided by the total number of pupils recorded in the October 2017 census to arrive at a per pupil amount for charging purposes. Using October 2016 census data to provide an indicative amount, this would equate to £13.38 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.

### Appendix C

### West Berkshire Council Maintained Schools

### **Proposal to De-Delegate Formula Funding 2018-19**

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

#### **Outline of Proposed Service 2018/19**

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

The current service is led by a Team Manager (0.8FTE), supported by a Learning Support Adviser (a qualified teacher) for 0.6 FTE. There are 5 part time Pupil Support Officers (Teaching Assistant level posts) who are employed for a total of 3.0 FTE. The service has administrative support for 1 day per week.

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

- Organisation of English language assessments of new arrivals and advanced bilingual speakers;
- Arranging advice and support for individual pupils, including those with EAL and SEN, for staff
- Arranging support for first language GCSE/AS/A2 papers; SATs maths translation.
- Arranging in- house school INSET focusing on EAL teaching and learning.
- LA wide INSET around issues such as the Equality Act 2010 and bespoke support for individual schools where necessary
- Leading training for teachers and teaching assistants on EAL/BME issues.
- Organisation of tailored packages of support to schools meet the needs of ethnic minority pupil and those from Gypsy, Roma, Traveller families.
- Joint working with other agencies to support schools with ethnic minority pupils.
- Provision of language assessments and support of unaccompanied asylum seeking children (UASC) in schools.
- Advice and guidance documents and resources to schools.

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

- Carrying out the English language assessments for new arrivals. West Berkshire assessment requests have remained steady at approximately 100 120 per academic year.
- Providing assessment reports with recommendations and guidance for classroom teachers.
- Tracking the attainment of GRT pupils termly.
- Support and guidance to schools with GRT pupils and managing the Great 121 project which trains teaching assistants to work on short term intensive programmes of learning to enable GRT pupils to narrow the gap in attainment with their peers.

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

- Bilingual support is provided for Polish, German, Portuguese, Bengali, Hindi.
- Support is focused on helping pupils to access the curriculum and English acquisition which can include pre-teaching of concepts; support for written work; translations; support for external examinations.
- Unaccompanied Asylum Seeking children and young people receive weekly support in class from EMTAS
- PSOs support schools with parent meetings/ FSM letters/interpreting for parents at SEND reviews.
- The Pupil Support Officer for GRT pupils has a wider brief involving intensive liaison between families and staff as well as supporting pupils in schools. GRT families are supported with attendance, admissions, transition, access to extra-curricular activities and engagement with learning.

#### **Benefits of Service**

#### Number of EAL assessments completed in the last three years

In 2015/16 117 assessments were carried out in 43 primary schools and 4 secondary schools. In 2016/17 the current number of assessments is 85 in 31 primaries and 4 secondaries. This number will continue to rise during the rest of the term and is likely to be close to previous levels of assessments. The autumn term has continued to have the highest number of referrals than in other terms.

EAL assessments, including guidance and reports, have been completed in the following schools in 2016/17:

Birch Copse	Beedon
Calcot Infant	Calcot Junior
Compton	Downsway
Falkland	Garland
Francis Baily	Hungerford
Long Lane	Kennet Valley
Mortimer St. John's Infant	Lambourn
Parsons Down Infant	Mortimer St. Mary's Junior
St. Finians	Mrs Bland's Infant
St. John the Evangelist Infant	Purley
St. Joseph's	Robert Sandilands
Sulhamstead and Ufton Nervet	Speenhamland
Thatcham Park	St. Nicolas
Westwood Farm Infant	Stockcross
The Willows	The Winchcombe
Westwood Farm Junior	Little Heath
John O'Gaunt (Academy)	Theale Green (Academy)
Park House (Academy)	

#### PSO (Bengali/Hindi)

Bilingual support has been provided in the following schools this year:

Calcot Infant	St. Nicolas Junior
Victoria Park Nursery	Calcot Nursery
Westwood Farm	

Schools have also received assistance with Bengali/Hindi first language assessments, CP cases, Speech and Language, SEND issues and parental interviews in other settings.

#### PSO (Polish)

Theale Green (Academy)	Francis Baily
Thatcham Park	Calcot Junior
Little Heath	Robert Sandilands
Trinity (Academy)	Inkpen
St John the Evangelist	The Willows
St. Joseph's	Park House
Birch Copse	Brookfields

The Polish PSO has carried out the oral component of GCSE Polish and relevant tuition. Also AS level Polish and 'A' level Polish.

The Polish PSO has translated the mathematics papers of the KS2 SATs for individual eligible pupils.

Schools have also received assistance with Polish first language assessments, setting up EAL coffee mornings, SEND, joint working with 'Cognition and Learning' and 'Speech and Language' and parental meetings in other settings.

#### PSO (UASC)

Four secondary aged unaccompanied asylum seeking children from Iraq, Eritrea and Syria have been supported this year. EMTAS provides academic, exam and pastoral support in lessons and in tutor time. This PSO also attends Personal Education Planning meetings, liaising with SENCOs, Social Workers, Heads of Year and the LACES team. Support has been provided at the following schools this year:

Trinity School (Academy)	Kennet School (Academy)
St.Joseph's	

This PSO has also provided regular in-class support for three primary aged children who arrived with their family as part of the Syrian resettlement.

#### **PSO (Portuguese)**

Portuguese and Brazilian pupils in the following schools have received Polish PSO support in this academic year.

John Rankin Infant	Little Heath
Kennet Valley	Park House (Academy)
Francis Baily	St. Nicolas
St.Paul's	Robert Sandilands
Speenhamland	John Rankin Junior

Schools have also received assistance with Portuguese first language assessments, joint working with Education Psychology, Speech and Language, EAL coffee mornings, SEND issues, FSM and interpretation for parents in other settings.

EMTAS has carried out the oral component of GCSE Portuguese and preparation tuition. The Portuguese PSO has translated the mathematics papers of the KS2 SATs for individual eligible pupils.

#### Number of TA funded hours given to schools

#### **De-delegation Proposals 2018/19**

2015/16	2016/17
1,100 hours (EAL)	955 hours (EAL)
60 hours (CPT)	00 hours (CPT)
60 hours (GRT)	90 hours (GRT)
Total £9,291.60	Total £12,015

Schools in receipt of GReaT 1 to 1 project funding during 2016/17 to provide targeted intervention for Gypsy, Roma and Traveller pupils. (hours included in the figures above):

Aldermaston	Beenham
Garland Junior	Hermitage
Basildon	

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

2015/16	2016/17
New Arrivals with EAL	New Arrivals with EAL
SCITT	SCITT
NQT	EAL Co-ordinator's Network meeting
Social Work Academy	
EAL Co-ordinator's	TA EAL training Hermitage School
Network meeting	EAL training for teachers
LSCB GRT training	and TAs Thatcham Park
The Winchcombe School – EAL all teachers	
Garland School Gypsy Roma & Traveller	
Mrs Bland's School Gypsy Roma & Traveller	
John Rankin Jnr and Infants: TAs Supporting EAL pupils	

#### Number of families supported by PSO (GRT)

West Berkshire has 102 children who are ascribed as Gypsy, Roma or Traveller. This number has increased from 2014/15 when it was 88. 34 West Berkshire schools have Gypsy, Roma and Traveller pupils on roll. This has increased from 24 in 2015/16 as ascription is increasing.

Approximately 55 GRT families have been supported by the PSO GRT and work continues with new families being ascribed to GRT status. 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. Children from Circus families have been supported in accessing education whilst in the LA.

#### Number of schools supported with GRT pupils

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

Aldermaston	Sulhamstead and Ufton Nervet
Basildon	Theale Green (Academy)
Garland Junior	Thatcham Park
Hermitage	Alternative Curriculum
Fir Tree (Academy)	Mrs Bland's Infants
Kennet Valley	The Willink
John Rankin Infant	Yattendon
Beenham	

EMTAS organised a day of off-site activities for GRT children in the August holiday. This included children from both Traveller sites in West Berkshire and some housed Travellers. They took part in canoeing at Adventure Dolphin and a family picnic.

#### Number of sessions run by the Learning Bus

7 sessions have been delivered from September 2016 to July 2017 on the 'Bus of Hope'. These have taken place monthly at Paices Hill Traveller site and have provided Parent and Toddler activities for families. These sessions have enabled Family Hubs staff, the Fire and Rescue Service, EWOs, Health Visitors, schools and other agencies to make contact with 'hard to reach' families through working alongside EMTAS.

#### **Proposed Cost of Delivery in 2018/19**

The following table summarises the proposed cost of the service for 2018/19 in comparison with 2017/18.

		2018/19	
	2017/18	Proposed	%
	£	£	Increase
Staffing Costs	182,010	185,480	
Other Costs	31,530	31,720	
Support Service Recharges	21,000	21,720	
Total Cost	234,540	238,920	1.9%
Less Surplus Brought Forward	- 3,150	- 38,300	
	231,390	200,620	
Less income from Special and			
Nursery Schools and PRUs		- 27,143	
Amount to be De-Delegated	231,390	173,477	-25.0%

The overall cost of delivering the service has increased by 1.9% which is in line with the estimated increase in staffing costs due to the expected April 2018 pay award and increments expected to be paid to existing staff. However, as the service spent £38,300 less than the amount which was agreed to be de-delegated in 2016/17, this amount can be used to help meet the cost of delivering the service in 2018/19. The amount proposed to be de-delegated in 2018/19 is therefore lower than in 2017/18.

#### Method of charging in 2018/19

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 after they enter the statutory school system) in the October 2017 census to arrive at a per pupil amount for charging purposes. Using October 2016 census data to provide an indicative amount, this would equate to £317.07 per pupil. Appendix A of the main report shows the indicative 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 at the following rates:

An EAL assessment and report£500-£600Support for individual pupils by a Pupil Support Officer£200 a dayTraining on Equality and Diversity including Equality Act requirements; EAL bilingualism, meetingthe needs of GRT pupils tailored to schoolsRequirements£600-£800 a dayTailored support provided by staff with relevant expertise£400-£500 a day

## West Berkshire Council Maintained Schools

## **Proposal to De-Delegate Formula Funding 2018-19**

## **Trade Union Representation Service**

#### **Outline of Proposed Service 2018/19**

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; NUT 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 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.

## **Benefits of Service**

The following data gives information on the level and types of support provided in 2015/16:

#### Number of contacts made to/by union officers in 2015/16

Casework	Email	Phone	In person	Meeting
Capability Issues	26	12	11	6
Pay & Conditions	19	7	4	3
Contracts	4	3	0	1
Disciplinary Issues	5	5	3	2
Grievance	4	6	1	1
Redundancy**				20
Restructuring**				8
TOTAL	58	33	19	41

Collective	In Person
LA Meetings <sub>2</sub>	27**
Del Train	9
Personal	
Receive	14
Train	
Research	Not recorded
Union	15
Briefing	

1 Includes formal support through appraisal

<sup>2</sup> Such as Joint Consultative Panel and Education Liaison meetings.

\*\* Number of attendances. Officers of several unions are normally present at each meeting **Notes** 

This is hierarchical, i.e. an email that leads to a meeting is not recorded.

Email: number of members supported by an exchange of emails

Phone: number of members supported through at least one phone call.

In person: number of members with whom a officer has met at least once

Meeting: number of members supported at a meeting with management.

Hearing: number of members supported at a hearing

Officers also spend time on internal union organisation such as attending, committee and general meetings. These activities are not undertaken in 'facilities time' Each union has a support infrastructure for its officers that includes reference resources as well as briefings and training courses included above.

## Proposed Cost of Delivery in 2018/19

The following table summarises the proposed cost of the service for 2018/19, compared to 2017/18. It is based on engaging a representative from each of the unions:

Union	2017/18	Proposed 2018/19
NASUWT		£14,745
NUT		£14,698
ATL		£12,634
NAHT		£3,264
ASCL		£2,244
Total Direct Costs		£47,580
Support Service Recharges		4,760
Total Cost		£52,340
Income from Academies		£1,696
Cost to Maintained Schools		£50,644
Less income from Nursery and Special Schools and PRUs		£2,202
Cost to Primary and Secondary Schools	£48,900	£48,442

The proposed budget for 2018/19 is based on:

- Reimbursement to schools providing release time for teacher trade union activities is dependent on agreement by Schools Forum in respect of maintained primary and secondary schools and from other schools 6which elect to buy in the facilities time - approximately equivalent to 1fte supply teacher across all unions, paid on UPS 3;
- Each trade union to have five days for 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 dedelegating rather than taking each sector separately.

## Method of charging in 2018/19

The total cost of the service will be divided by the total number of pupils recorded in the October 2017 census to arrive at a per pupil amount for charging purposes. Using October 201 census data to provide an indicative amount, this would equate to £3.15 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.

#### **De-delegation Proposals 2018/19**

Currently some academies are using their allocation for trade union facilities time to set up school based consultative arrangements, rather than 'buying in' to local authority arrangements. This might be the preferred model for all secondary schools in the future with de-delegation and funding of release time for representatives to undertake union duties in another WBC school to be confined to the Primary sector.

There may also 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 2018-19** 

## **CLEAPSS Service**

#### **Outline of Proposed Service 2018/19**

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 independent of West Berkshire Council.

The CLEAPSS subscription includes Radiation Protection Officer (RPO) (including site visit/assessment) and the Radiation Protection Adviser Service (RPA) for secondary schools and academies.

## **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 risk assessments
- 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 2018/19

CLEAPSS set the pricing each year in January/February for the financial year April to March ahead. In 2017/18 the charge to schools was 15 pence per pupil including administration costs plus £220 per secondary school for the RPA and RPO services.

The proposal for 2018/19 is to set a rate per pupil of 16 pence per pupil which is expected to cover any increase in the CLEAPSS fee and the cost of administration. As the dedelegation 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. Any shortfall or surplus will be carried forward to the following year.

#### Other Options which may be considered

Independent, Academies, Foundation and VA schools may purchase the CLEAPSS subscription directly through CLEAPSS at an increased price.

The proposed cost per pupil/school is shown in the table below in comparison with the cost of buying this service 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
Primary	16p	21p	N/A	N/A
Secondary	16p	27р	£40	£185
Special	16p	21p	N/A	N/A
PRU	16p	21p	N/A	N/A

## Appendix F

## West Berkshire Council Maintained Schools

## **Proposal to De-Delegate Formula Funding 2018-19**

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

#### Accountancy (Statutory Functions)

#### Description of Duties:

Consolidation of school accounts into Council's year end statement of accounts.

Overview of school budget submissions & budget monitoring reports.

Monitoring of schools in deficit.

Monitoring adherence to Scheme for Financing Schools.

Returns to Central Government – CFR, CFO grants return.

Administration of grants & other funding to maintained schools eg. PPG, budget allocations & adjustments.

Cost: £33,793

0.35 FTE Accountant 0.10 FTE Senior Accountant 0.15 FTE Finance Manager

#### Pension Scheme Administration

#### Description of Duties:

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.

Cost: £33,759

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: £45,173

0.3FTE Senior Auditor0.5 FTE Auditor0.07 FTE Audit Manager0.03 FTE Chief Internal Auditor

## West Berkshire Council Maintained Schools

**Proposal to De-Delegate Formula Funding 2018-19** 

**Statutory and Regulatory Duties – Health and Safety** 

#### 1. Summary of Options

#### Option 1

- 1.1 Combine the costs of the provision of the schools health and safety service currently split and funded from de-delegated funds and through buy back income, thus removing the differing levels of service and maintain current staff levels.
- 1.2 All schools will equally and equitably share the costs of the provision of the schools health and safety service. The three posts will provide an equivalent of the Level Two service to all maintained schools, although some site visits will be more evenly distributed so the fire, asbestos, legionella, play equipment review visits would move to 'at least every 2 years or more frequently as required'. This accommodates the extra 25 schools that would qualify for them as all schools would be paying but spreads the workload over 2 years with 3.2 FTE posts.

#### Option 2

1.3 Maintain the current choice based service options with all schools equally and equitably share the costs of the provision of the Level One schools health and safety service. Those schools that decide to purchase the Level Two schools health and safety service will then be provided the comprehensive health and safety support service equivalent of the Level Two service.

#### 2. 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.
- 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 he needs to take to comply with the requirements and prohibitions imposed upon him by or under the relevant statutory provisions and by Part II of the Fire Precautions (Workplace) Regulations 1997.
- 2.3 The regulations also 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 his undertaking, the risks to which the employers employees are exposed and the distribution of those risks throughout the undertaking. 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 the employer in the majority of the Council's schools.
- 2.6 In the case of Foundation and Voluntary Aided schools the Governors are the employer. The Council also has the general "duty to educate", even where the Governors are the employer.

#### 3. Health & Safety Support Service

- 3.1 The Council has an established, professional and well regarded Health and Safety Team that already supports West Berkshire schools, currently through two service options, Level One and Level Two.
- 3.2 The Level One service suggests compliance with the Management of Health and Safety at Work Regulations in terms of access to competent advice for health and safety. The Level One service includes for a health and safety needs assessment of schools on a three year basis but all other services are remote and delivered by email and/or telephone contact. All other services set out in Level Two are not included or would require payment.
- 3.3 Schools health and safety needs assessments are completed less frequently for Level One schools and there is no additional support to improve on the areas identified in the needs assessment report. The schools are expected to make the improvements themselves without further access to competent advice and support. The issues discussed at 3.2 and 3.3 are not necessarily compatible with 2.3 above.
- 3.4 The Level Two service 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.
- 3.5 Two members of the health and safety team provide the Level Two service to the 50 schools that opt to take the service. It could also be argued that there is a potential conflict in performing a compliance / enforcement role with their customers.
- 3.6 The Health and Safety Team provide a compliance, advice and training role for schools. However, the work of the team relies on the buy-back which thus far has been reasonably stable but only just covers the costs of the posts.
- 3.7 This brings with it difficulty in future planning and the risk that if there was even a relatively small drop off in buy-back that one of the posts would be vulnerable. This in turn would make the service unviable as it would not be possible to maintain the Level Two service with one post/person.

#### 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 January.

- 4.2 There were options to move to a uniform service level delivered to all schools and funded by all schools paying an equal share based on pupil numbers and one option to remain with the part funded and part buy-back service as we are. Head Teachers voted to remain as we are with a Level 1 core service (funded by all schools) and the Level 2 buy-back support service.
- 4.3 Head Teachers accepted that if the Level 2 buy-back drops off then this would jeopardise the future provision of the service and requested that a further report be brought for their consideration if that was to happen.
- 4.4 As was somewhat expected at this time last year the overall buy-back of the service by schools did reduce slightly with around five schools dropping out due to budget constraints.
- 4.5 Buy back for the year 2017/8 was £93,280 with staffing costs around £110,666 including overheads, leaving a shortfall of around £17,386.
- 4.6 Funding for the Level 1 post, which was held vacant, offset this in the short term but we need to establish the structure and funding for the Schools H&S Team going forward.
- 4.7 We have recently been successful in a tender process for health and safety support service to the Excalibur Academies Trust for approximately £13,000 per annum. However, the volume of work means that we need to fill the vacant post to maintain service standards to all schools, thus adding to the financial pressure notwithstanding the additional income.
- 4.8 We were also successful in gaining work and income from Park House Academy and Dingley's Promise Nursery's.

#### 5. **Proposals**

#### Option 1

5.1 To combine the costs of the provision of the schools health and safety service as shown in the table below and remove the differing levels of service.

#### Table 1

Staffing Structure Required to deliver Option10.2 FTE Health & Safety Manager1.0 FTE Health & Safety Officer2.0 FTE Senior Health & Safety Officers	:
Total Cost of Service to Maintained Schools	£167k
Less: Charge to maintained nursery, special, and PRU schools	-£7k
Total Cost of Service Proposed to be met by Maintained Primary and Secondary Schools	£160k
Estimated Rate per Pupil	£10.34

- 5.2 This staffing structure will provide a comprehensive health and safety support service equivalent of the Level Two service to all schools but we would need to smooth the workload over more time, so the fire, asbestos, legionella, play equipment review visits would move to 'at least every 2 years or more frequently as required'. This accommodates the extra 25 schools that would qualify for them as all schools would be paying but spreads the workload over 2 years with 3.2 FTE posts.
- 5.3 All schools will equally and equitably share the costs of the provision of the schools health and safety service.

#### Option 2

- 5.4 Maintain the current choice based service options with all schools equally and equitably share the costs of the provision of the Level One schools health and safety service.
- 5.5 Those schools that decide to purchase the Level Two schools health and safety service will then be provided the comprehensive health and safety support service equivalent of the Level Two service to all schools at additional cost. Additional costs for the Level Two service will be charged similar to existing.

#### Table 2

Staffing Structure Required to deliver Option1 0.2 FTE Health & Safety Manager 1.0 FTE Health & Safety Officer	:
Total Cost of Service to Maintained Schools	£57k
Less: Charge to maintained nursery, special, and PRU schools	-£2.5k
Total Cost of Service Proposed to be met by Maintained Primary and Secondary Schools	£54.5k
Estimated Rate per Pupil	£3.52

This is not a preferred option for the arguments set out above in 2.2, 2.3 and 2.4 in that it may not comply the spirit of the legislation. The work of the remainder of the team will rely on the buy-back which, in the recent few years has only just covered the costs of two posts. This brings difficulty in future planning and the risk that if there was even a relatively small drop off in buy-back that one of the posts would be vulnerable. This in turn could make the Level Two service unviable as it would not be possible to maintain the Level Two service with one post/person.

#### 6. Conclusion

6.1 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 to 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.

#### **De-delegation Proposals 2018/19**

- 6.2 Risk is part of life but accidents do not need to be, so while schools need to make sure staff, pupils and visitors are safe, they also need to make sure that pupils are helped to become risk aware without becoming unnecessarily risk averse.
- 6.3 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.

# Report title: High Needs Place Funding 2018/19

Report being considered by:	Heads Funding Group on 11 <sup>th</sup> October Schools Forum on 30 <sup>th</sup> October			
Report Author:	Jane Seymour			
Item for:	Discussion B	y:	All Forum Members	

#### 1. Purpose of the Report

1.1 The purpose of the report is to advise Heads' Funding Group and Schools Forum members of planned places allocated currently to special schools, resourced schools, FE providers and mainstream sixth forms and likely numbers of pupils in those institutions requiring planned place funding in 2018-19.

#### 2. Recommendation(s)

2.1 That the report is noted and any implications for the HNB budget are incorporated in to the report which will be brought to the next meeting on the draft HNB budget for 2018-19.

Will the recommendation require the matter to be referred to the Council or the	Yes:	No: x
Executive for final determination?		

#### 3. Introduction/Background

- 3.1 Place funding is allocated by the Education Funding Agency for children and young people with high level needs who are under 16 and attend a special or resourced school.
- 3.2 Place funding is also allocated by the Education Funding Agency for young people with high level needs who are over 16 and attend a mainstream school, special school, resourced school or FE College.
- 3.3 Places currently funded by the EFA and actual places currently filled are as follows:

SCHOOL / INSTITUTION	Planned Places 2017/18	ACTUAL Numbers Sept 17	Difference
Primary schools with special resources			
Fir Tree (ASD Resource)	0	2 (but 5 places needed)	-5
Speenhamland (PD Resource)	10	8	+2
The Winchcombe (Speech Lang Resource)	15	12	+3

Theale Primary (ASD	10	7	+3
Resource)			
Westwood Farm Infant (HI	5	3	+2
Resource)			
Westwood Farm Junior (HI	10	6	+4
Resource)			
Secondary (special			
resources / post 16 only)			
Denefield	2	TBC	
John O'Gaunt	0	TBC	
Kennet (inc. PD & HI	38	9 HI+14 PD =	
Resource)		23 + m/s TBC	
Little Heath	5	TBC	
Park House	2	TBC	
St. Bartholomew's	2	TBC	
The Downs	1	TBC	
The Willink	2	TBC	
Theale Green (inc. ASD	15	14 ASD + m/s	
Resource)		TBC	
Trinity (inc. SpLD	39	27 SPLD + 9	
Resource and ASD		ASD = 36 +	
Resource)		m/s TBC	
Special schools			
Brookfields	218	225	-7
The Castle	147	169	-22
FE Colleges			
Newbury College	91	103	-12
West Berkshire Training	4	4	0
Consortium			
TOTAL (excluding PRUs)	616		

- 3.4 The EFA will base 2018/19 financial year place funding on the place funding allocated for 2017/18. There will be no opportunity for Local Authorities to request additional planned places.
- 3.5 The total number of planned places in 2018/19 will therefore remain the same as in 2017/18. Local Authorities will have the flexibility to move planned place funding between institutions, in line with any changing patterns of need, but there will be no overall increase in planned place funding.
- 3.6 Any places which need to be funded over and above the current total of 616 will therefore represent a pressure on the High Needs Block.
- 3.7 There is a shortfall this year in planned place funding from the EFA for Brookfields, The Castle, the new Fir Tree ASD Resource and Newbury College. Funding for planned places has been allocated to these schools which represents a budget pressure in the High Needs Block in the current financial year. (This was taken in to account in budget planning for 2017-18).

- 3.8 It should be noted that the number of high needs students at Newbury College has not yet been finalised due to late enrolments.
- 3.9 The new Fir Tree ASD resource has 2 pupils currently but requires 5 planned places due to the disproportionately high costs of educating a small number of pupils when a new resource opens.
- 3.10 The SEN Assessment Team is currently in the process of reviewing place funding requirements for 2018/19. This process will involve consideration of actual numbers of high needs pupils in placements, intelligence about possible changes of placement in 2018/19 and views from the schools / institutions themselves about their likely numbers.
- 3.11 As some institutions have more planned places than they require, a decision will need to be taken for 2018/19 as to whether some of the "surplus" planned places are reallocated. However, this is likely to be difficult for small resourced units as they may then be unable to fund the required basic level of staffing to run the resource.
- 3.12 The numbers of students with Education Health and Care Plans in mainstream school sixth forms have not been included in this report and are currently being confirmed. The planned places for mainstream sixth forms are based on historical numbers and so if numbers are now lower there may be scope to reallocate some planned place funding.
- 3.13 The report which will be brought to the next HFG / Schools Forum meeting on the High Needs Budget for 2018-2019 will incorporate any possible savings through reduction in planned place funding where it is no longer required and also any possible budget pressures where there is a shortfall of planned place funding.
- 4. Supporting Information
- 4.1 See above.
- 5. **Options for Consideration**
- 5.1 Not applicable.
- 6. **Proposals**
- 6.1 See above.
- 7. Conclusion
- 7.1 See above.
- 8. Consultation and Engagement
- 8.1 Schools were asked to confirm their numbers as being correct.
- 9. Appendices
- 9.1 None.

#### **10. Heads Funding Group Recommendation**

10.1 That the report is noted.

## Dedicated Schools Grant Monitoring Report 2017/18 – Month 6

Report being considered by:	Schools Forum		
On:	30/10/2017		
Report Author:	Ian Pearson		
Item for:	Discussion	By:	All Forum Members

#### 1. Purpose of the Report

1.1 This report sets out the current financial position of the services funded by the Dedicated Schools Grant (DSG), highlighting any under or over spends.

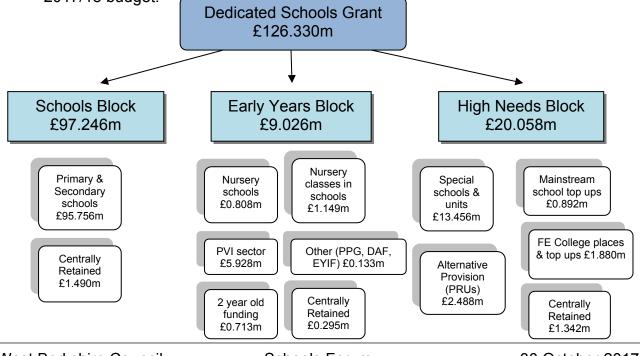
#### 2. Recommendation(s)

2.1 That the report be noted.

Will the recommendation require the matter to be referred to the Council or the Executive for final determination?Yes:No:
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#### 3. Background

- 3.1 The Dedicated Schools Grant (DSG) is a ring fenced specific grant which can only be spent on school/pupil activity as set out in The School and Early Years Finance (England) Regulations 2017.
- 3.2 The grant is split into three funding blocks. Although separate allocations are received for each, the blocks themselves are not ring fenced.
- 3.3 The following diagram shows what is funded out of each of the three blocks in the 2017/18 budget:



West Berkshire Council

30 October 2017

#### Dedicated Schools Grant Monitoring Report 2017/18 – Month 6

Notes:

- 1. The figures above include expected net overspend of grant totalling £0.426m. The actual in-year grant allocation is £125.904m
- The main centrally retained services are: Schools Block – licences for all schools, growth fund for schools, school admissions service Early Years Block – quality monitoring & compliance, eligibility checking, sufficiency & sustainability planning High Needs Block – ASD advisory support, Home Tuition, Engaging Potential, therapy services, sensory impairment support, inclusion support, applied behaviour support, vulnerable children support, early intervention
- 3. The figures include funding to Academies and post 16 high needs place funding which form part of our allocation but not our budget as they are paid direct by the EFA this totals £35,020k.
- 3.4 Overspends, unless funded from outside the DSG, are carried forward and top sliced from the following year's DSG allocation. Under spends must be carried forward to support the school's budget in future years.
- 3.5 The Authority and Schools' Forum are responsible for ensuring that the DSG is deployed correctly according to the Regulations, and monitoring of spend against the grant needs to take place regularly to enable decision making on overspends/underspends and to inform future year budget requirements.

#### 4. Monitoring Position as at Month 6 (30 September 2017)

4.1 The forecast under or over spend position at the end of September is shown in Table 1 below. A more detailed position per cost centre is shown in Appendix A.

	Total <i>Forecast</i> (under) / over spend				Change from last report		
	Budget	Month Three	Month Six	Month Seven	Month Nine	Month Ten	
DSG Block	£'000	£'000	£'000	£'000	£'000	£'000	£'000
Schools Block (inc ISB)	64,286	0	0				0
Early Years Block	8,983	0	0				0
High Needs Block	17,518	0	11				11
Total Net Expenditure	90,787	0	0				11
Support Service Recharges	523	0	0				0
Total Expenditure	91,310		0				0
DSG Grant Expected	-90,506	0	0				0
Net Position	804	0	0				0

#### Table 1

4.2 The budgeted over spend of £844k on DSG in 2017/18 was approved by the Schools' Forum in March 2017, after consideration of the three year position, as it was forecast that the over spend could be paid back over two years (assuming costs overall do not significantly increase and our DSG allocation remains at a similar level). The budgeted overspend in 2017/18 has now been reduced by £40k to £804k, because the final amount of grant brought forward from 2016/17 was £80k higher than expected, but this was offset by the claw back of 2016/17 early years funding and other minor adjustments made by the DfE in July 2017.

#### Dedicated Schools Grant Monitoring Report 2017/18 – Month 6

4.3 Explanations for variances per funding block are summarised in the following paragraphs.

#### 5. Schools Block

5.1 Table 2 sets out the current position of the Schools Block. At this stage in the year, no variance is forecast. The main risk of over spend in this block is in relation to business rates (as schools are funded according to their actual rates bill). There is a small budgeted overspend due to the 2016/17 carry forward of over spend arising from rating revaluations during the year.

#### Table 2 – Schools Block

	Current Budget £	Current Forecast £	Variance £
Expenditure	64,286,490	64,286,490	0
Support services	333,800	333,800	0
Schools Block DSG	-64,593,080	-64,593,080	0
Net Position	27,210	27,210	0

#### 6. Early Years Block

6.1 Table 3 sets out the current position of the early years block. The early years block is difficult to predict due to the volatile nature of both early years block funding (the final grant allocation will be determined by the January 2018 census), and payments to providers (payments are made according to actual number of hours of provision each term). The budgeted overspend is due to last year's grant not meeting the payments made to providers, and is planned to be repaid over a three year period.

#### Table 3 – Early Years Block

	Current Budget £	Current Forecast £	Variance £
Expenditure	8,982,690	8,982,690	0
Support services	43,690	43,690	0
EY Block DSG	-8,739,610	-8,739,610	0
Net Position	286,770	286,770	0

6.2 Summer term payments to providers have been made and are on line with the budget set, so no variance is forecast at this point in time. We will aim to report any forecast variance arising from the Autumn term payments at month 7.

#### 7. High Needs Block

7.1 Table 4 sets out the current position of the High Needs Block.

#### Dedicated Schools Grant Monitoring Report 2017/18 – Month 6 Table 4 – High Needs Block

	Current Budget £	Current Forecast £	Variance £
Expenditure	17,517,790	17,528,620	10,830
Support services	145,640	145,640	0
HN Block DSG	-17,172,790	-17,172,790	0
Net Position	490,640	501,470	10,830

- 7.2 A variance of 11k is now reported in respect of the Sensory Consortium. These additional costs relate to pupils with HI or VI who have either moved in to the area or who have moved from specialist to mainstream provision and whose needs for teacher of the deaf or teacher of the visually impaired support cannot be met from the Sensory Consortium core service. It is therefore necessary to purchase additional sessions to top up the core service
- 7.3 High needs top up budgets were set according to the number of placements in the Spring term, and no variance from budget is yet forecast. However, there is a strong possibility that forecast expenditure may change in the second half of the autumn term, or in the spring term, due to funding following the pupil.

#### 8. Conclusion

8.1 There is currently only a small overspend of £11k forecast in the High Needs Block. However there is a strong possibility that further variances may arise on the budgets for high needs top ups and early years payments in the second half of the autumn term, or in the spring term.

#### 9. Appendices

Appendix A – DSG 2017-18 Budget Monitoring Report Month 6



		Dedicated School	's Grant (DS	G) 2017-18	Budget M	onitoring N	Nonth 6	
Budget manager	Cost Centre	Description	Orginal Budget 2017-18	Net Virements in year	Amended Budget 2017-18	Forecast	Variance	Comments
lan Pearson	90020	Primary Schools (excluding nursery	47,293,060		47,293,060	47,293,060	0	
lan Pearson	DSG top	funding) Academy Schools Primary	0		0	0	0	
	slice	Secondary Schools (excluding 6th form			-		-	
lan Pearson	90025 DSG top	funding)	14,544,690		14,544,690	14,544,690	0	
Maxine Slade	slice	Academy Schools Secondary	0		0	0	0	
lan Pearson	90230	DD - Schools in Financial Difficulty (primary schools)	119,980	194,670	314,650	314,650	0	
Rob O'Reilly	90113	DD - Trade Union Costs DD - Support to Ethnic minority &	44,040		44,040	44,040	0	
Hazel Davies	90255 90349	bilingual Learners	210,580	41,450	252,030 217,190	252,030	0	
Michelle Sancho Ian Pearson	90349	DD - Behaviour Support Services DD - CLEAPSS	193,860 2,980	23,330	2,980	217,190 2,980	0	
Eaine Ricks-Neal Ian Pearson	90470 90423	DD - School Improvement DD - Statutory & Regulatory Duties	223,240 144,200		223,240 144,200	223,240 144,200	0	
lan Pearson	90235	School Contingency - Grow th	202,000		202,000	202,000	0	
lan Pearson	90583	Fund/Falling Rolls Fund National Copyright Licences	128,940		128,940	128,940	0	
lan Pearson	90019	Servicing of Schools Forum	42,240		42,240	42,240	0	
lan Pearson Karen Pottinger	90743 90354	School Admissions ESG - Education Welfare	236,460 224,810		236,460 224,810	236,460 224,810	0	
lan Pearson Ian Pearson	90422 90460	ESG - Asset Management ESG - Statutory & Regulatory Duties	54,030 361,930		54,030 361,930	54,030 361,930	0	
	00+00							
		Schools Block Total	64,027,040	259,450	64,286,490	64,286,490	0	
lan Pearson	90010	Early Years Funding - Nursery Schools	807,540		807,540	807,540	0	+
		Early Years Funding - Maintained					-	
Avril Allenby	90037	Schools	1,148,970		1,148,970	1,148,970	0	
Avril Allenby Ian Pearson	90036 90052	Early Years Funding - PVI Sector Early Years PPG & Deprivation Funding	5,928,090 39,900		5,928,090 39,900	5,928,090 39,900	0	
Avril Allenby	90051	Disability Access Fund	18,450		18,450	18,450	0	
Avril Allenby	90018	2 year old funding	713,430		713,430	713,430	0	
Avril Allenby	90017	Central Expenditure on Children under 5	206,310		206,310	206,310	0	
Rhian Ireland	90287	Pre School Teacher Counselling	45,000		45,000	45,000	0	
Rhian Ireland	90238	Early Years Inclusion Fund	75,000		75,000	75,000	0	
		Early Years Block Total	8,982,690	0	8,982,690	8,982,690	0	
Nicola Ponton Nicola Ponton	90026 90539	Academy Schools RU Top Ups Special Schools - Top Up Funding	768,370 3,237,280		768,370 3,237,280	768,370 3,237,280	0	
Nicola Ponton	90548	Non WBC Special Schools - Top Up Funding	1,086,890		1,086,890	1,086,890	0	
Nicola Ponton	90575	Non LEA Special School (OofA) Independent Special School Place & Top	891,130		891,130	891,130	0	
Nicola Ponton	90579	Up	2,012,700		2,012,700	2,012,700	0	
Nicola Ponton Nicola Ponton	90580	Further Education Colleges Top Up Resourced Units top up Funding	1,309,980		1,309,980	1,309,980	0	
Nicola Ponton	90617	maintained Non WBC Resourced Units - Top Up	202,620		202,620	202,620	0	
Nicola Ponton	90618	Funding	55,000		55,000	55,000	0	
Nicola Ponton	90621	Mainstream - Top Up Funding maintained	534,010		534,010	534,010	0	
Nicola Ponton	90622	Mainstream - Top Up Funding Acadamies	191,410		191,410	191,410	0	
Nicola Ponton	90624	Non WBC Mainstream - Top Up Funding	66,960		66,960	66,960	0	
Cathy Burnham	90625	Pupil Referral Units - Top Up Funding	875,870		875,870	875,870	0	
Nicola Ponton	90627	Disproportionate No: of HN Pupils NEW	100,000		100,000	100,000	0	
			11 000 000		11.000.000	11.000.000		
	-	h Needs Block: Top Up Funding Total	11,332,220	0	11,332,220	11,332,220	0	
Cathy Burnham Ian Pearson	90320 90540	Pupil Referral Units Special Schools	735,000 2,860,000		735,000 2,860,000	735,000 2,860,000	0	
Nicola Ponton	90584						0	
r		Resourced Units - Place Funding (70)	350,000		350,000	350,000		
	н	Resourced Units - Place Funding (70) gh Needs Block: Place Funding Total	350,000 3,945,000	0	350,000 3,945,000		0	
Nicola Ponton	н 90240			0			0	
Nicola Ponton Rhian Ireland Rhian Ireland		gh Needs Block: Place Funding Total	3,945,000 76,000 311,840	0	<b>3,945,000</b> 76,000 311,840	3,945,000		
Rhian Ireland	90240 90280	gh Needs Block: Place Funding Total Applied Behaviour Analysis Specl Needs Spprt Team	<b>3,945,000</b> 76,000	0	<b>3,945,000</b> 76,000	<b>3,945,000</b> 76,000 311,840	0	
Rhian Ireland Rhian Ireland Rhian Ireland Jane Seymour	90240 90280 90287 90288 90288 90290	Igh Needs Block: Place Funding Total Applied Behaviour Analysis Specl Needs Sprt Team Pre School Teacher Courseiling Elective Home Education Monitoring Sensory Impairment	3,945,000 76,000 311,840 40,000 27,660 215,710	0	3,945,000 76,000 311,840 40,000 27,660 215,710	3,945,000 76,000 311,840 40,000 27,660 226,540	0 0 0 0	Additional visits required due to need.
Rhian Ireland Rhian Ireland Rhian Ireland	90240 90280 90287 90288	Igh Needs Block: Place Funding Total Applied Behaviour Analysis Specl Needs Sprt Team Pre School Teacher Courseiling Elective Home Education Monitoring	3,945,000 76,000 311,840 40,000 27,660	0	<b>3,945,000</b> 76,000 311,840 40,000 27,660	3,945,000 76,000 311,840 40,000 27,660	0 0 0 0	
Rhian Ireland Rhian Ireland Rhian Ireland Jane Seymour Jane Seymour Cathy Burnham Rhian Ireland	90240 90280 90287 90288 90290 90295 90315 90555	Igh Needs Block: Place Funding Total Applied Behaviour Analysis Speci Needs Spprt Team Pre School Teacher Counseiling Elective Home Education Monitoring Sensory Impairment Therapy Services Home Tuition LAL Funding	3,945,000 76,000 311,840 40,000 27,660 215,710 267,460 345,000 116,200	0	3,945,000 76,000 311,840 40,000 27,660 215,710 267,460 345,000 116,200	3,945,000 76,000 311,840 40,000 27,660 226,540 267,460 345,000 116,200	0 0 0 10,830 0 0 0 0	
Rhian Ireland Rhian Ireland Rhian Ireland Jane Seymour Jane Seymour Cathy Burnham Rhian Ireland Nicola Ponton Jane Seymour	90240 90280 90287 90288 90290 90295 90315 90555 90565 90565	Igh Needs Block: Place Funding Total Applied Behaviour Analysis SpecI Needs Spprt Team Pre School Teacher Counseiling Elective Home Education Monitoring Sensory Impairment Therapy Services Home Tuition LAL Funding Equipment For SEN Pupils SEN Commissioned Provision	3,945,000 76,000 311,840 40,000 27,660 215,710 267,460 345,000 116,200 10,000 455,160	0	3,945,000 76,000 311,840 40,000 27,660 215,710 267,460 345,000 116,200 10,000 455,160	3,945,000 76,000 311,840 40,000 27,660 226,540 267,460 345,000 116,200 10,000 455,160	0 0 0 10,830 0 0 0 0 0 0 0 0 0 0	
Rhian Ireland Rhian Ireland Rhian Ireland Jane Seymour Jane Seymour Cathy Burnham Rhian Ireland Nicola Ponton	90240 90280 90287 90288 90290 90295 90315 90555 90565	Igh Needs Block: Place Funding Total Applied Behaviour Analysis Speci Needs Sport Team Pre School Teacher Counseiling Elective Home Education Monitoring Sensory Impairment Therapy Services Home Tuition LAL Funding Equipment For SEN Pupils	3,945,000 76,000 311,840 40,000 27,660 215,710 267,460 345,000 116,200 10,000	0	3,945,000 76,000 311,840 40,000 27,660 215,710 267,460 345,000 116,200 10,000	3,945,000 76,000 311,840 40,000 27,660 226,540 267,460 345,000 116,200 10,000	0 0 0 10,830 0 0 0 0 0 0 0 0	
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	Item	HFG Deadline	Heads Funding Group	SF Deadline	Schools Forum	Action required	Author
Term 2	Scheme for Financing Schools 2017/18	21/11/17	28/11/17	04/12/17	11/12/17	Decision	Claire White
	Draft DSG Funding & Budget 2018/19	21/11/17	28/11/17	04/12/17	11/12/17	Discussion	Claire White
	Final School Formula Proposal 2018/19	21/11/17	28/11/17	04/12/17	11/12/17	Decision	Claire White
	Draft High Needs Budget 2018/19	21/11/17	28/11/17		11/12/17	Discussion	Jane Seymour & Michelle Sancho
-	Draft Early Years Budget 2018/19	21/11/17	28/11/17	04/12/17	11/12/17	Discussion	Avril Allenby
	Update on Schools in Financial Difficulty	21/11/17	28/11/17	04/12/17	11/12/17	Information	Claire White
	Schools Funding Benchmarking	21/11/17	28/11/17	04/12/17	11/12/17	Information	Claire White
	DSG Monitoring 2017/18 Month 7			04/12/17	11/12/17	Information	lan Pearson
Term 3	Dedicated Schools Grant (DSG) Funding Settlement and Budget Overview 2018/19	03/01/18	10/01/18	15/01/18	22/01/18	Discussion	Claire White
	Final Schools Block Budget 2018/19	03/01/18	10/01/18	15/01/18	22/01/18	Decision	Claire White
	High Needs Block Budget Proposals 2018/19	03/01/18	10/01/18	15/01/18	22/01/18	Decision	Jane Seymour & Michelle Sancho
	Early Years Block Budget Proposals 2018/19	03/01/18	10/01/18	15/01/18	22/01/18	Decision	Avril Allenby
	Growth Fund and Falling Rolls Fund 2017/18			15/01/18	22/01/18	Information	Claire White
	DSG Monitoring 2017/18 Month 9			15/01/18	22/01/18	Information	lan Pearson
Term 4	Work Programme 2018/19	20/02/18	27/02/18	05/03/18	12/03/18	Decision	Jessica Bailiss
	Final DSG Budget 2018/19	20/02/18	27/02/18	05/03/18	12/03/18	Decision	Claire White
	Final High Needs Block Budget 2018/19	20/02/18	27/02/18	05/03/18	12/03/18	Decision	Jane Seymour & Michelle Sancho
	Final Early Years Block Budget 2018/19	20/02/18	27/02/18	05/03/18	12/03/18	Decision	Avril Allenby
	DSG Monitoring 2017/18 Month 10			05/03/18	12/03/18	Information	lan Pearson

#### Schools Forum Work Programme 2017/18

Please note that items may be moved or added as required.

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