

Notice of Meeting

Schools Forum

Monday 21st January 2019 at 5.00pm
at Shaw House Church Road Newbury
RG14 2DR

Date of despatch of Agenda: Tuesday, 15 January 2019

For further information about this Agenda, or to inspect any background documents referred to in Part I reports, please contact Jessica Bailiss on (01635) 503124
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Agenda - Schools Forum to be held on Monday, 21 January 2019 (continued)

Forum Members: Reverend Mark Bennet, Anthony Chadley, Jonathon Chishick, Catie Colston, Jacquie Davies, Lynne Doherty, Antony Gallagher, Keith Harvey, Alan Henderson, Jon Hewitt, Lucy Hillyard, Brian Jenkins, Hilary Latimer, Mollie Lock, Sheila Loy, Patrick Mitchell, Chris Prosser, David Ramsden, Graham Spellman (Vice-Chairman), Jayne Steele, Bruce Steiner (Chairman), Suzanne Taylor and Charlotte Wilson

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Monday 11th of March 2019, 5pm at Shaw House

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

SCHOOLS FORUM

MINUTES OF THE MEETING HELD ON MONDAY, 10 DECEMBER 2018

Present: Reverend Mark Bennet, Jonathon Chishick, Catie Colston, Jacquie Davies, Lynne Doherty, Antony Gallagher, Keith Harvey, Angela Hay, Jon Hewitt, Brian Jenkins, Hilary Latimer, Mollie Lock, Patrick Mitchell, Chris Prosser, David Ramsden, Bruce Steiner (Chairman), Suzanne Taylor, Charlotte Wilson and Iain Wolloff (Substitute) (In place of Ben Broyd)

Also Present: Melanie Ellis (Chief Accountant), Amin Hussain (Schools Finance Manager), Ian Pearson (Head of Education Service), Jane Seymour (Service Manager, SEN & Disabled Children's Team) and Annette Yellen (Accountant for Schools Funding and the DSG) and Jessica Bailiss (Policy Officer (Executive Support))

Apologies for inability to attend the meeting: Ben Broyd, Councillor Anthony Chadley, Alan Henderson, Lucy Hillyard, Michelle Sancho and Graham Spellman

PART I

31 Minutes of previous meeting dated 15th October 2018

The Minutes of the meeting held on the 15th October 2018 were approved as a true and correct record and signed by the Chairman.

32 Actions arising from previous meetings

The Schools' Forum received an update regarding actions recorded during the previous meeting. Actions had been completed and could therefore be removed from the list of actions arising for the previous meeting. Action 2 regarding the Secondary Governor vacancy on the Schools' Forum was ongoing.

33 Declarations of Interest

Iain Wolloff declared an interest in Agenda Item 6, and reported that, as his interest was a disclosable pecuniary interest or an other registrable interest, he would be leaving the meeting during the course of consideration of the matter.

34 Membership

Jessica Bailiss gave the following updates regarding Membership for the Schools' Forum:

- Angela Hayes' Term of Office would cease at the end of December 2018 and consultation was taking place through the Primary Headteacher Executive Group to find a replacement representative.
- Keith Harvey and Antony Gallagher's term of office would come to an end in January 2019 and they were consulting with the relevant forum.
- There was still a Secondary Governor Representative vacancy. Expressions of interest had been sought however, no interest was shown and therefore consultation with Governors would continue.

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- Regarding the Primary Governor Representative vacancy, an election had been coordinated (and the deadline extended) however, no nominations had been received. The election process would run again early in the New Year.
- Regarding the Academy Governor Representative vacancy, an election was underway and nominations had been received. This is not normally something the Local Authority would undertake on behalf of the academies however, there was more than one Governor interested in the position and therefore an election process was required. The result of the election would be announced on the 13th December 2018.

35 Final Additional Funding Criteria 2019/20 (Amin Hussain)

Iain Wolloff declared a disclosable pecuniary interest in Agenda Item 6 by virtue of the fact that he was the Principal at Newbury College, which was the Sponsor for the new school being built as part of the Sandleford development. As his interest was a disclosable pecuniary interest, he would be leaving the meeting during the course of consideration of the matter and would take no part in the debate or voting on the matter.)

(Iain Wolloff left them meeting at 5.15pm)

Ian Pearson introduced the report which set out for approval the proposed criteria and budgets for additional funds for 2019/20.

The Schools' Forum needed to consider the proposals under sections 2.1 and 2.2 of the report.

Ian Pearson drew attention to the first bullet point and Appendix A to the report, concerning Growth Fund Criteria for 2019/20. There would be a new school opening in 2019 and two sums of money had already been agreed. Funding would include the actual cost of staff appointed and in post prior to the opening of the new school up to a maximum of £75k, plus a fixed one-off lump sum of £25k for all the purchases necessary before the school opened.

Regarding the diseconomies of scale, this provided financial top up for the new school. The new school would be sponsored by Newbury College however a decision needed to be taken concerning the number of years support funding would be provided through diseconomies of scale. The Department for Education (DfE) expected diseconomies of scale funding to be provided for a minimum of two years and therefore three years was being proposed. Ian Pearson drew attention to the XX under paragraph two of section 2.1 and stated that '3 years' should have been inserted into the report.

Ian Pearson moved on and drew attention to the second bullet point under section 2.1 concerning the Schools in Financial Difficulty Fund and explained that though various discussions at both the Heads' Funding Group and Schools' Forum an agreed position had been reached to cap the fund at £200k. Schools that had paid into the fund in 2018/19 would have access to the fund, however, because there was already a significant balance within the fund, no schools would be expected to contribute in 2019/20. This would allow the balance to decrease.

Ian Pearson drew attention to bullet point three under section 2.2 concerning approving the budget of £100k for schools with disproportionate numbers of high needs pupils. Local authorities could provide additional targeted support to individual schools from its High Needs Block (HNB) where it would be unreasonable to expect the first £6k of support for that schools high needs pupils to be met from the local authorities formula funding, due to an exceptional number of such pupils on its roll.

Jonathon Chishick noted that the agreed £100k had been spent within the current year and therefore asked if enough money was being allocated for this purpose and whether schools with higher than average numbers of children with Education, Health and Care

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Plans (EHCPs) were being underfunded. It was questioned if data on children receiving Special Education Needs (SEN) Support had been studied, to see if some schools had more pupils.

Ian Pearson reported that SEN support was a self-declared high level of support. If subsidies were to be provided for pupils in certain categories then this could cause a perverse incentive to place more pupils in categories. Ian Pearson confirmed that discussions around a central fund had not taken place. Regarding whether £100k was sufficient to support schools, Ian Pearson commented that it was too early to know. The Schools' Forum could decide to increase the amount allocated however, this would impact on funding elsewhere.

David Ramsden commented that if the criteria was widened then there would be a risk that many more children could be funded, which would be unaffordable.

Ian Pearson reported that on occasion a school might present a case that it had higher numbers of pupils with Special Education Needs or Disabilities (SEND) that fell below requirements for an EHCP. It was confirmed that there was data available on pupil numbers

Rev. Mark Bennet referred to the issue regarding falling rolls and asked if local demographic data was suggesting that there might be a falling rolls issue in the future. Rev. Mark Bennet suggested that it would be worth looking retrospectively at the data. Ian Pearson reported that the Schools' Forum had taken the view to remove funding support for this factor however, it was permissible to reinstate this funding. This required consideration going forward.

Catie Colton referred back to the diseconomies of scale issue and asked what the Schools' Forum's responsibilities were for a new school receiving this funding. Ian Pearson confirmed that the new school would operate as a 'free school', which followed the same rules and regulations as academies. Funding would flow from the Education, Skills and Funding Agency (ESFA) directly to the school however, the Local Authority had to agree with the Schools' Forum how the local funding formula would address the needs of the new school. Funding for the school would not be sufficient to cover the cost of running the school and therefore agreement needed to be sought with Newbury College on threshold requirements and on how long additional support was required for.

The Chairman invited members of the Forum to vote on whether they agreed with the recommendations set out in sections 2.1 and 2.2 of the report. Jonathon Chishick proposed that the Schools' Forum support the recommendations and this was seconded by Keith Harvey. At the vote the motion was carried.

RESOLVED that the Schools' Forum agreed the recommendations set out in sections 2.1 and 2.2 of the report.

36 Final School Funding Formula Proposal 2019/20 (Amin Hussain)

(Iain Wolloff re-joined the meeting at 5.30pm)

Ian Pearson introduced the report which set out the result from the consultation with schools on the proposed primary and secondary school funding formula for 2019/20 and to make a final recommendation.

The report gave a summary of the consultation responses from schools. Only six of the 81 schools in West Berkshire had responded to the consultation. The Schools' Forum would need to take the final decision.

Ian Pearson drew attention to the three recommendations on the first page of the report. The first recommendation related to replicating the National Funding Formula (NFF) in West Berkshire. The second recommendation concerned the use of the Minimum

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Funding Guarantee (MFG) to flex any reduced or additional funding as appropriate and scaling the factors according to affordability. The third recommendation recommended transferring 0.5% from the Schools Block to the High Needs Block.

The table on page 37 of the agenda pack showed Option 1, which included a -0.5% MFG and 3% cap on gains. The table on page 39 of the agenda pack showed Option 2, which included a 0% MFG and 2% cap on gains. The tables for each of the options showed the impact on each school. Option 2 ensured gains were kept to a minimum to ensure most schools did not lose funding as a result of the NFF.

Ian Pearson drew attention to the table on page 30 of the agenda pack which compared the impacts of Options 1 and 2 (Typographical error: Column two should be titled Option 2). The Heads' Funding Group had considered the information along with the six consultation responses and had reached the view that Option 2 was the preferred option.

Regarding the transfer of 0.5% from the Schools Block to the High Needs Block, this had been considered at length by the HFG and three had voted for transferring the funds and seven against. Of the six schools that had responded to the consultation 2 had given a view in favour of transferring the funding and four had been opposed.

Ian Pearson suggested that the Schools' Forum had the opportunity to discuss other items on the agenda which were linked to the transfer of funding prior to taking a decision. It was agreed that the decision would be taken after Item 16.

Rev. Mark Bennet was of the understanding that Option 1 would be aligned to the eventual formula figures for each school and he queried if this had been considered by the HFG. Ian Pearson reported that the HFG were fully aware of this point however, were also aware that Option 2 would offer protection to losing schools for a prolonged period of time. Keith Harvey concurred with this view.

Catie Colston asked what the latest information was saying regarding when there would be a move to the NFF. Ian Pearson explained that there were a range of reasons preventing a move to the NFF at the current time, including the other important Government business that was taking priority. A move to the NFF would be deferred for at least another year, potentially until 2020/21. Catie Colston noted that essentially there was some leeway until the NFF came into force.

The Chairman invited members of the Schools' Forum to vote on the recommendations. Patrick Mitchell proposed that the Schools' Forum use the NFF rates for every formula factor, applying a funding cap of gains and MFG as agreed at the meeting. This was seconded by Mark Bennet. At the vote the motion was carried.

David Ramsden proposed that that Option 2 be adopted which would include a 2% cap on gains and MFG of 0%. This was seconded by Chris Prosser. At the vote the motion was carried.

RESOLVED that the first two recommendations, were agreed as set out above. The third recommendation regarding a transfer of funds from the Schools' Block to the High Needs Block would be discussed and voted on after Item 16.

(Discussion after Items 8 to 16 had been considered)

The Chairman drew the Schools' Forum's attention back to the third bullet point regarding a decision required concerning the transfer of 0.5% of funding from the Schools' Block to the High Needs Block (HNB).

Rev. Mark Bennet referred to the Benchmarking report (Item 14) and felt that West Berkshire might compare well to other Local Authorities regarding spending within the HNB, because a lump sum of funding had already been transferred in recent years. Rev. Mark Bennet did not feel that a transfer of £490k would resolve the issue within the HNB.

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Ian Pearson highlighted that issues within the HNB were not unique to West Berkshire and were being faced nationally. The Officer recommendation was to transfer the funding and if agreed the Schools' Forum would need to agree how the money was allocated.

Ian Pearson added that some local authorities had already transferred the funds and he was aware that both Kent and Reading Local Authorities had recently received agreement to transfer the funds from their Forums. Some other local authorities had carried out the transfer in 2018/19 however this had not been the case for West Berkshire.

Although the Officer recommendation was to approve the transfer. The Heads Funding Group had voted against (7 to 3) the transfer.

Patrick Mitchell stated that the Department for Education (DfE) had clear guidelines on what information should be provided to schools through the consultation and he was concerned that some of these guidelines had not been followed in West Berkshire. Therefore he did not feel that the correct procedure had been followed to consider a transfer. Ian Pearson commented that the guidelines set out that two separate consultation documents should be sent out to schools and in West Berkshire this had been merged into one document and not as much information had been provided as had been by Reading Local Authority.

Keith Harvey stated that he felt conflicted regarding the transfer. He acknowledged the points made by David Ramsden and Patrick Mitchell however, understood that it was a difficult position to be in.

David Ramsden stated that he fully supported the position to further lobby the Government. There were more complex social issues that needed consideration.

The Chairman invited members of the Schools' Forum to vote on whether they agree with Officer recommendation to approve the funding transfer. Jon Hewitt proposed that the Officer recommendation be approved and this was seconded by Angela Hayes. At the vote this motion was not carried.

RESOLVED that a transfer of 0.5% from the Schools' Block to the HNB was not approved.

37 Final De-delegations 2019/20 (Amin Hussain)

Amin Hussain introduced the report, which set out the details, cost and charges to schools of the services on which maintained schools' representatives were required to vote (on an annual basis) whether or not they should be de-delegated.

There were three categories that required a vote and these were set out under section 2 of the report.

Ian Pearson reported that there had been ongoing discussions about the Health and Safety Options and clarified that Option 1 related to an enhanced more expensive service and Option 2 included the core service and was what had been agreed by schools for the previous year.

It was suggested that a vote on Accountancy Options 1 and 2 take place after Item 15 (Schools: deficit recovery), which would be moved to next on the agenda.

The Chairman invited maintained schools to vote on the de-delegations proposals for 2019/20. It was clarified that the vote would exclude accountancy options and regarding Health and Safety Options, the proposal included Option 2 (cores service).

Maintained Primary Schools

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Antony Gallagher proposed that maintained primary schools support the de-delegation of the following services and this was seconded by Hilary Latimer. At the vote the motion was carried.

- Behaviour Support Services
- Ethnic Minority Support
- Trade Union Representation
- Schools in Financial Difficulty
- CLEAPSS
- Statutory and Regulatory Duties comprising:
 - Internal Audit of schools
 - Administration of pensions for school staff
 - Health and Safety (Option 2)

Maintained Secondary Schools

David Ramsden proposed that maintained secondary schools support the de-delegation of the following services and this was seconded by Chris Prosser. At the vote the motion was carried.

- Behaviour Support Services
- Ethnic Minority Support
- Trade Union Representation
- CLEAPSS
- Statutory and Regulatory Duties comprising:
 - Internal Audit of schools
 - Administration of pensions for school staff
 - Health and Safety (Option 2)

Maintained Special, Nursery and PRU Schools

Jacquie Davies proposed that maintained Special, Nursery and PRU Schools support the de-delegation of the following services and this was seconded by Suzanne Taylor. At the vote the motion was carried.

- Statutory and Regulatory Duties comprising:
 - Internal Audit of schools
 - Administration of pensions for school staff
 - Health and Safety (Option 2)

RESOLVED that the proposals as set out above were agreed by the relevant maintained school representatives.

(After Item 15 had been considered regarding schools: deficit recovery)

Ian Pearson explained that there were two Options available concerning statutory accounting functions in respect of schools. The details setting the two options out was included under Appendix F on page 84 of the agenda.

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David Ramsden felt that it was too early to make a decision on this point as it was not yet known how many schools would be in deficit. Patrick Mitchel felt that adopting Option 1 would be penalising those schools not in deficit.

Jonathan Chishick highlighted that the difference in cost between the options was 71 pence per pupil however, Option 1 would provide increased accountancy support across schools. Some smaller schools were struggling to balance budgets and therefore he did not feel that 71 pence per head was a great amount to help address the situation.

It was confirmed to members of the Schools' Forum that the decision could not be taken on a per school basis.

David Ramsden was concerned that schools not in deficit would be covering the cost of schools in deficit. He queried if assumptions had been made with regards to adopting Option 1. Ian Pearson confirmed that the work was currently only provided on a yearly basis and therefore if schools voted in favour of Option 1, they would be voting for continuation of the increased support to schools.

Rev. Mark Bennet queried how the effectiveness of inter school support was assessed and queried if this was provided from a central service or if certain schools were called upon to help schools which were struggling with deficits. Melanie Ellis reported that there were two headteachers currently involved in the visits to schools that were struggling. Ian Pearson reported that there was no such support in review meetings however signposting and matching was carried out. For example the new Business Manager from the Willows School was being supported by the experienced a Business Manager at Mortimer St Mary's C.E. School.

Jonathon Chishick reiterated that it was only 0.5 FTE that was being debated, which required a relatively small amount of money.

Catie Colston commented that historically there had been many areas of support provided for example Governor Services however, many of these areas had been scaled back or eliminated completely. Catie Colston expressed her support for funding professional help.

David Ramsden proposed that accountancy function Option 2 (without additional dedicated support) be supported and this was seconded by Patrick Mitchell. At the vote this motion was not carried.

Antony Gallagher proposed that accountancy function option 1 (with additional dedicated support) be supported and this was seconded by Jon Hewitt. At the vote the motion was carried.

RESOLVED that the Option 1 accountancy services was agreed by the Schools' Forum.

38 **Schools: deficit recovery (Melanie Ellis)**

Melanie Ellis introduced the report to the Schools' Forum, which provided an update on the work being carried out with the nine schools that had set deficit budgets in 2018/19.

There was now dedicated support for schools in deficit. A one year fixed term 0.8FTE term time only Senior Accountant post has been created in the Schools' Finance Team. For the period 1st September 2018 until 31st August 2019 the post holder would work with schools that had set a deficit budget in 2018/19.

All schools had submitted their Period 7 Budget Monitoring and Forecast reports. Two schools were forecasting a deficit in excess of their license. If this was still the case at the next 'Task Force' meeting following Period 9 forecast then intervention might be required.

Catie Colston queried the sustainability of improvements being made. Melanie Ellis confirmed that this was difficult to answer early in the process however, feedback from

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schools was very positive. Catie Colston felt that it was important to share any 'warning signals' experienced by schools before falling into deficit.

David Ramsden felt that a longer term view was required. Some schools had been in and out of deficit over the past eight years and some had been in deficit long term and this was concerning. It was felt that some trend information would be helpful. Melanie Ellis confirmed that there was some trend information included for each of the nine schools in deficit under the appendices to the report. David Ramsden felt that data ranging further back in time was required as it often took time to get out of deficit. A longer term view was required to highlight any patterns

Melanie Ellis commented that all schools had recently been emailed a health check assessment to carry out. RAG rating had also been carried out with school business managers to assess financial management ability. This information could be brought a future meeting of the Schools' Forum.

Jonathon Chishick suggested that if trend data was to be explored then in year deficits be included.

RESOLVED that

- Information on RAG ratings on financial management ability to be presented a future meeting of the Schools' Forum.

39 High Needs Block - Resourced Units (Jane Seymour)

Jane Seymour introduced the report, which aimed to inform the Schools' Forum of proposed action in response to concerns expressed by some mainstream schools with resourced units that they had a shortfall in funding, and to seek agreement from the Schools' Forum.

So that the extent of the issue could be explored it was proposed within the report that a survey be conducted as all current information was anecdotal. A final report would be submitted to the Schools' Forum in March 2019.

It was also proposed that if any changes were required to the resourced unit banding system, consideration would be required by the Schools' Forum in March 2019, when consideration would also be given to the shortfall in the High Needs Block for 2019/20.

David Ramsden proposed that proposals set out in Section 4 of the report were supported by the Schools' Forum. This was seconded by Angela Hayes. At the vote the motion was carried.

RESOLVED that the Schools' Forum agreed the proposal set out in Section 4 of the report.

40 Funding children with EHCPs who attend PRUs (Jane Seymour)

Jane Seymour introduced the report, which sought agreement for the proposed banding system for children with Education, Health and Care Plans (EHCPs) who were placed in Pupil Referral Units (PRUs).

Jane Seymour reported that historically there had always been some children with EHCPs who attended PRUs, usually on a short term placement pending an alternative placement. The number of children with EHCPs attending PRUs was increasing and some children were staying with PRU placements on a longer term basis and Jane Seymour explained that this was something that was intentional.

The first band was SEMH1 and this band had no additional funding attached. Two bands were being proposed and these were bands SEMH 1 and 2 and they would have higher levels of funding attached and would be for children with more complex needs.

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David Ramsden recalled suggesting at the Heads Funding Group that the bands be kept under review overtime, to ensure they system did not become top heavy. This would need revisiting at a later stage.

Rev. Mark Bennet was concerned that placing children in categories would move away from a system that considered individual needs. Jane Seymour reassured members of the Forum that every child would receive an in depth assessment for an Education and Health Care Plan (EHCP). The aim of the banding system was to provide accuracy and transparency when additional funding was awarded.

Keith Harvey proposed that the Schools' Forum approve the proposed banding system set out in section 5 of the report and this was seconded by Charlotte Wilson. At the vote the motion was carried.

RESOLVED that:

- The Schools' Forum agreed the proposed banding system set out in section 5 of the report.
- The banding system be reviewed overtime and to be brought back to the Schools' Forum at later stage.

41 High Needs Places and Arrangements 2019/20 (Jane Seymour)

Jane Seymour introduced the report, which advised the 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 2019-20.

The report was brought to the Forum on an annual basis. Jane Seymour reported that a number of Planned Places were set by the Education and Skills Funding Agency (ESFA) and there was no option to increase the number of places allocated apart from for academies and FE providers. If extra places were agreed by the ESFA for these settings then funding for these places was top sliced from the High Needs Block and allocated to by the ESFA. Jane Seymour explained that some of the funding was recouped through import /export adjustments.

New regulations required local authorities to fund all places for high needs students at FE colleges regardless of where the students were resident and which local authority had financial responsibility for them. In West Berkshire this equated to a request for an additional 43 places for Newbury College, which if agreed would need to be top sliced from the High Needs Block. An import /export adjustment would be made to the 2019-20 High Needs Budget to reflect the placed places which West Berkshire had funded for students from other local authorities however, it was possible that there would still be a shortfall. Jane Seymour added that there was little flexibility to move places around.

RESOLVED that the Schools' Forum noted the report.

42 Draft DSG Funding & Budget 2019/20 (Amin Hussain)

Amin Hussain introduced the report which set out the overall calculation of the Dedicated Schools Grant (DSG) in 2019/20 and the current position for each of the funding blocks.

Amin Hussain drew attention to each of the funding block in turn. Regarding the Schools Block under section five of the report, the final funding for 2019/20 would be determined by the October 2018 pupil numbers multiplied by West Berkshire primary and secondary units of funding. Amin Hussain drew attention to section 5.3 which gave a breakdown of the block based on the October 2017 census numbers. More detail would be available at the next meeting of the Forum in January as the result of the October 2018 census had just been received.

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Regarding the Central Schools Services Block under section six of the report, the Council's Executive had agreed to meeting the statutory and regulatory duties costs in 2018/19, which was a one year only decision and there would be a requirement to find balance this block in 2019/20. Further details and proposals on the Central Schools Services Block would be brought to the meeting of the Schools' Forum in January 2019.

Amin Hussain moved on to the Early Years Block and stated that it was too early to make an accurate forecast for the current year because funding would be based on the January 2019 census.

Amin Hussain drew attention to section eight of the report regarding the High Needs Block (HNB). Forecasting would be based on the October 2018 census. A deficit had been set in 2016/17 with a plan to repay the amount over three years. It was unlikely that this would be achievable due to increasing demands on the block.

Amin Hussain drew attention to Appendix A to the report, which gave a breakdown of funding within each of the blocks. Appendix B showed the current deficit to be £2.2 million, which was considerably higher than the deficit, for the previous year. Amin Hussain commented that if the 0.5% transfer of funding from the Schools Block to the HNB was approved this would not eliminate the deficit however, it would go some way to helping the situation.

RESOLVED that the Schools' Forum noted the report.

43 **Draft High Needs Budget 2019/20 (Jane Seymour)**

Ian Pearson introduced the report which set out the current financial position of the high needs budget for 2018/19 and the position known so far for 2019/20, including likely shortfall.

The deficit amount agreed in 2018/19 had been driven upward due to an increase in students requiring specialist provision. Ian Pearson explained that the detail was set out within the report however, in essence increased spending was because there were more pupils requiring specialist provision; increased numbers of students were needing to be moved out of mainstream school and there as increased numbers of students presenting with complex needs.

Jane Seymour referred to details for Place Funding, on page 136 and reported that the budget had overspent by £240k. Some of this would be offset by import / export adjustments.

(Jonathon Chishick and Hilary Latimer left the meeting at 6.31pm)

Jane Seymour drew attention to Table 2 under appendix A on page 136 regarding Top up funding. Top up funding was paid to institutions where pupils from West Berkshire were placed. Most top up budgets were under pressure, and the type of placement creating the greatest pressure was shown in order under section 2.2 of the report. The cost of Education and Health Care Plans in mainstream schools had increased compared to previous years for the first time and this was because a higher band was having to be used due to increased complex needs. Jane Seymour reported that the overall pressure on the block was in excess of £500k due to cost of needing to move more students out of mainstream school into specialist provision.

Jane Seymour moved on to talk about Pupil Referral Units (PRUs). The number of children with Education Health Care Plans (EHCPs) being placed at PRUs was increasing as this was often an appropriate and cost effective provision for some young people. Under new funding arrangements for PRUs, these placements had to be funded through the SEN budget. The estimated cost was £331,400 for 2019/20. Jane Seymour stressed that these placements were more cost effective than independent and non-

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maintained special school placements. iCollege had been expanded specifically to allow for the admission of SEND/EHCP students.

Regarding other statutory services under Section 4 of the report. The budget for Sensory Impairment services was under particular pressure because of an increase in the number of children with severe hearing and visual impairments, who required a high level of visits from teachers of the deaf / visually impaired.

Jane Seymour explained that overall the £2.4million pressure was an accumulation of the areas detailed in Appendix A. The main reason for the pressure was the cost of moving children out of mainstream schools into other settings. There was a strategy in place however, the benefit would not be seen in the short term. Savings would need to be made however, this was getting more difficult. Jane Seymour reported that robust demand strategies were in place and the most cost effective options were always chosen. The underlying issue was the demand for high need provision was rising but the funding had remained static.

Keith Harvey referred to the large amount of savings that had been made to the HNB in recent years and felt that it was time that increased pressure was placed on the Government through Local Members of Parliament (MPs). Councillor Lynne Doherty confirmed that action was already being taken. Letters had been sent to the Local Government Association through the South East Group however, there had been little engagement in response. The issue was a national problem so it was hoped that the Government would react soon.

Jon Hewitt reported that the Special Schools in West Berkshire had written a joint letter to local MPs. 'Voice' the group that represented special schools was also taking a similar approach. Jon Hewitt added that parents were also critical in making the Government take action. It was a Central Government issue and change was required. Jon Hewitt stressed that there was not an issue with the HNB as a result of poor management, it was a collective deficit as it was all blocks that were funded by the DSG.

The Chairman commended the points that had been raised by members of the Forum and stated that unfortunately the Government seemed to be focusing little else apart from Brexit at the point in time.

David Ramsden referred to the decision due to be taken regarding transferring money from the Schools Block to the HNB and stated that he was against transferring the money. He acknowledged the points made by Jon Hewitt and accepted that it was a national issue. He also used the opportunity to commend the work undertaken by Jane Seymour and her team. Parents were being forced to take their cases to tribunals and schools and the SEN Team were feeling the pressure. David Ramsden explained that his objection to the transfer was based on three issues. Firstly he did not feel that cuts had been made hard enough the previous year. Secondly if the funding was transferred, £490k was not going to make the difference required to the HNB. Thirdly, schools were already under immense pressure and he did not feel that funding should be taken from the Schools Block that was already under pressure.

The Chairman noted the points made and reminded members of the Forum that this area would be discussed in greater detail later on the agenda.

(Charlotte Wilson left the meeting at 6.42pm)

Jane Seymour reported that a strategic approach was being undertaken and there was a five year SEN Strategy in place however, this would take time to roll out. Regarding the transfer of funds from the Schools' Block to the HNB, Jane Seymour reported that out of £9 million, only £800k was spent on non-statutory services and to cut these services further would place further pressure on the rest of the HNB.

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Jacque Davies added that of 64 learners at iCollege, 40% had no funding attached, which placed great pressure on the HNB.

Keith Harvey referred to the cuts that had been made the previous year and queried how much these savings had saved in the long term. It was important that value for money was kept in mind.

Rev. Mark Bennet it was easy to look inwards when under pressure and stated that some services needed to be provided at scale to be provided effectively. He asked if cross boundary working was considered. Ian Pearson stated that opportunities for joined up working were always taken. Examples of this work currently taking place included the Sensory Consortium service run by all the Berkshire Local Authorities and the proposed SEMH provision provided in partnership with Reading.

Ian Pearson highlighted that West Berkshire's position in terms of its HNB was also driven by the National SEN Funding Formula. West Berkshire suffered because levels of deprivation was one of the factors that the formula was based on.

RESOLVED that the Schools' Forum noted the report.

44 **SEN Benchmarking (Jane Seymour)**

Jane Seymour introduced the report which provided comparative information on High Needs Block spending across local authorities in the South East. Jane Seymour explained that the report included information from the High Needs Block (HNB) Department for Education (DfE) benchmarking tool. The information looked at budgets rather than spending and showed costs per head against other local authorities in the South East.

Jane Seymour drew attention to paragraph 3.3 which showed the five groups that the HNB was grouped into. The data showed that West Berkshire was not significantly out of line with other local authorities in the South East.

Paragraph 3.7 showed that the West Berkshire top up funding in maintained schools, academies, free schools and FE colleges was £206 per head, which was slightly above the South East average of £196 per head, but below the England average of £216 per head.

West Berkshire's per head budget for non-maintained and independent special schools (paragraph 3.8) was £122, which was higher than the South East average of £111.

Data showed that West Berkshire spent less on SEN support services. Brighton and Hove had very high spend on these services, which it was thought might be to help more children stay in mainstream schools. This required further investigation.

The West Berkshire Therapies Budget showed in the benchmarking tool as £8 per head compared to the South East average of £3 per head and a range of £0 to £14 per head. This was the biggest discrepancy between West Berkshire and the South East average and required further investigation as it was thought that the data might not be accurate.

Jane Seymour reported that Appendix 2 showed overspend on HNBs across 2017/18 and all but three local authorities had overspent. West Berkshire was the second lowest in terms of how much it had overspent at 2.8%.

RESOLVED that the Schools Forum noted the report.

45 **DSG Monitoring 2018/19 Month 7 (Ian Pearson)**

Amin Hussain introduced the report which provided an update on the work being carried out with the nine schools that has been set a deficit budget in 2018/19.

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At Month 7 there was a net forecast overspend of £431k. The budget had been set with an overspend of £464k against the DSG, as per the decision made by the Schools' Forum. The forecast overspend position at Month 7 against expenditure budgets was £315k with a further £116k under achievement on the High Needs funding primarily due to a reduction in the import/export adjustment.

Amin Hussain explained that details for each of the blocks was included within the report. Paragraph 8.3 set out the main variances against expenditure for the High Needs Block.

Overspending in the High Needs Block were significant and the total overspend forecast against the Block was £895k (including budgeted over spend) and consideration needed to be given to where spending could be scaled back and savings identified in order to contain overspend to the initial budget or alternatively transfer an amount from the Schools' Block to the High Needs Block.

RESOLVED that the Schools' Forum noted the report.

(The Chairman drew the Forum's attention back to Item Seven to make a decision on transferring money from the Schools' Block to the High Needs Block)

46 **Forward Plan**

The Forward Plan was noted.

47 **Any Other Business**

There was no other business raised.

48 **Date of the next meeting**

The next meeting would take place on Monday 21st January 2019, 5pm at Shaw House.

(The meeting commenced at 5.00 pm and closed at 7.00 pm)

CHAIRMAN

Date of Signature

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Agenda Item 3

Actions from previous meeting

Ref No.	Date of meeting(s) raised	Item	Action	Responsible Officer	Comment / Update
Dec18 - Ac1	10th December 2018	Schools: deficit recovery	Information on RAG ratings on financial management ability to be presented to a future meeting of the Schools' Forum.	Melanie Ellis	This will be presented to the HFG and School's Forum in February/March 2019.
Dec18 - Ac2	10th December 2018	Funding for Children with EHCPs who attend PRUs	The banding system be reviewed overtime and to be brought back to the Schools' Forum at later stage.	Jane Seymour	Date to be confirmed.

Ongoing Actions

Ref No.	Date of meeting(s) raised	Item	Action	Responsible Officer	Comment / Update
Jun18 - Ac1	18th June 2018	Membership	Chris Prosser and David Ramsden to consult with the relevant governing bodies regarding the secondary governor vacancy.	Chris Prosser / David Ramsden	Consultation with Governors is ongoing.

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Final Schools Funding Formula 2019/20

Report being considered by: The Schools' Forum
On: 21st January 2019
Report Author: Amin Hussain
Item for: Decision **By:** All School representatives

1. Purpose of the Report

1.1 The Council's Executive must agree on an annual basis the school funding formula for primary and secondary schools. This report sets out the proposal for financial year 2019/20.

2. Recommendations

- 2.1 To note the final formula rates and allocations to schools, to be approved by the Council's Executive on 14th February. These have been made according to the principles agreed by Schools' Forum in December and in relation to the total funding available from the Schools Block DSG allocation.
- 2.2 For schools that gain funding under the new formula, additional funding is capped at 2% per pupil (as per the National Funding Formula).
- 2.3 For schools that lose funding under the new formula, a minimum funding guarantee of an additional 0% per pupil increase is applied (maximum affordable).

Will the recommendation require the matter to be referred to the Council or the Executive for final determination?	Yes: <input checked="" type="checkbox"/>	No: <input type="checkbox"/>
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3. Implications

- 3.1 Financial: Schools are funded by the ring fenced Dedicated Schools Grant (DSG) and the school formula allocations do not impact on the Council's own resources. However, the cost of unmanageable school deficits or closing schools may fall on the Council.
- 3.2 Policy: None
- 3.3 Personnel: Real term reductions in funding allocations will inevitably lead to staffing restructures and possible redundancies in schools.
- 3.4 Legal: The allocation of funding to schools must comply with The Schools and Early Years Finance Regulations 2019.

- 3.5 Risk Management: For many schools their funding allocation will not increase by anywhere near the amount required to cover current increases in costs; the number of schools at risk of deficit will increase, and the non-viability of small schools may become a reality. It is imperative that the work which commenced in 2017/18 on supporting schools in financial difficulty continues.
- 3.6 Property: None.
- 3.7 Other: None.

4. Introduction

- 3.1 The funding arrangements for 2019/20 include the introduction of the National Funding Formula (NFF). For the next two years the NFF will operate as a “soft” system. This means that the NFF is used as a new methodology of allocating funding to each local authority in a more fair and equitable way. Local authorities will then allocate this out to schools according to a local formula complying with the school finance regulations. The two are not the same, and not all local authorities will be able to exactly replicate the NFF in the allocations it makes to schools.
- 3.2 A consultation took place with all schools from 31st October to 20th November 2018 Appendix B contains the briefing and consultation document that went out to all schools. This document also contains all the background information to the school formula and the proposed formula options.
- 3.3 The following recommendations were agreed upon on by Schools’ Forum on 9th December 2018:
- (1) Use the National Funding Formula (NFF) rates for every formula factor, applying a minimum funding guarantee of 0% and a funding cap on gains of 2% per pupil.
 - (2) If required after the above has been applied, scale every formula factor upwards or downwards in order to match the final funding allocation available for distribution to schools.
 - (3) Use the School Finance Regulations calculation of the sparsity factor, rather than the NFF calculation.
- 3.3 West Berkshire is able to replicate the NFF because:
- (1) The previous West Berkshire funding rates are not significantly different.
 - (2) There has not been a significant difference between 2017 pupil characteristics used in the DSG funding allocation and the 2018 actual pupil characteristics that need to be funded in schools.
 - (3) There is only a small deficit in the schools block to be repaid from the 2019/20 allocation (this relates to the difference between budgeted and actual business rate allocations in the formula).

- (4) The estimated requirements for growth funding in 2019/20 are not greater than the historical funding allocated within the DSG.
- (5) There is **no** funding to be transferred from the schools block DSG to other funding blocks, including meeting pressures in the high needs block.

5. Final School Formula

- 4.1 The final schools block DSG funding allocation for 2019/20 is £100.09m. After deducting £0.555m for the growth fund this leaves £99.535m to be allocated to schools.
- 4.2 The final data from the October 2018 school census was received from ESFA on 15th December. By applying the NFF rates (including the area cost adjustment (ACA) for West Berkshire of 0.0341), and using a 2% per pupil cap on gains and 0% minimum funding guarantee, this costs £100.639m, just over the grant allocation.
- 4.7 Appendix A contains the funding allocations per school, also comparing to 2018/19 allocations. Where there is a negative impact in total funding, this is because pupil numbers have decreased (funding is protected on a per pupil level only, there is no funding floor). Where funding per pupil has decreased, this is because pupil numbers in the school have increased and the fixed sum is spread over more pupils.
- 4.8 Overall, there is £3m of extra funding going into West Berkshire schools.

6. Conclusion

- 5.1 Moving straight onto the NFF rates gives West Berkshire schools certainty and stability on their funding allocations for the next couple of years.
- 5.2 There continues however to be significant concern about the shortfall in funding, and the ability of schools to balance their budget without having an impact on pupils. The table in Appendix A illustrates that for most schools gaining funding, the gain is not significant. Many schools will still have difficulty in balancing their individual budgets given current cost pressures, particularly the twenty schools where pupil numbers have decreased and overall funding has gone down.

Appendices

Appendix A – 2019/20 School Formula Allocations – Final (January 2019)

Appendix B – 2019/20 consultation document for Schools Funding

Appendix A

2019/20 School Formula Allocations Final

Cost Centre	SCHOOL	2018/19 ALLOCATION (including MFG)			2019/20 ALLOCATION (pre MFG)			Change Prior to Transition Adjustments	MFG/CAP on GAINS				Total Funding 2019/20
		Formula Budget	Pupil No's (Oct 2017)	Per Pupil Funding	Formula Budget	Pupil No's (Oct 2018)	Per Pupil Funding		MFG 100.00%	Floor 1.00%	CAP 2.0%	TOTAL	
91000	Aldermaston Church of England Primary School	652,140	158	4,127	666,824	168	3,969	14,684	0	16,174	0	16,174	682,998
91100	Basildon Church of England Primary School	587,496	142	4,137	588,705	144	4,088	1,209	8,193	0	0	8,193	596,898
91300	Beedon Church of England Controlled Primary School	294,950	49	6,019	258,741	45	5,750	-36,209	0	23,105	0	23,105	281,846
91400	Beenham Primary School	367,938	73	5,040	353,943	71	4,985	-13,995	0	9,613	0	9,613	363,556
91200	Birch Copse Primary School	1,459,568	422	3,459	1,505,316	423	3,559	45,748	0	0	0	0	1,505,316
91500	Bradfield Church of England Primary School	587,169	145	4,049	634,193	164	3,867	47,024	0	16,510	0	16,510	650,703
91600	Brightwalton Church of England Aided Primary School	419,789	94	4,466	443,455	100	4,435	23,666	2,734	0	0	2,734	446,190
91700	Brimpton Church of England Primary School	323,282	56	5,773	294,238	56	5,254	-29,044	0	30,931	0	30,931	325,169
91800	Bucklebury Church of England Primary School	508,452	120	4,237	475,918	112	4,249	-32,534	0	9,767	0	9,767	485,685
91900	Burghfield St. Mary's Church of England Primary School	793,480	211	3,761	776,370	213	3,645	-17,110	0	29,208	0	29,208	805,578
92000	Calcot Infant School & Nursery	882,670	219	4,030	907,405	204	4,448	24,735	0	61,115	0	61,115	968,520
92100	Calcot Junior School	1,164,060	288	4,042	1,176,960	288	4,087	12,899	0	0	0	0	1,176,960
95600	Chaddleworth St. Andrew's Church of England Primary School	212,982	25	8,519	204,650	24	8,527	-8,333	0	5,308	0	5,308	209,958
92400	Chieveley Primary School	776,446	206	3,769	746,900	202	3,698	-29,546	0	22,996	0	22,996	769,895
95900	Cold Ash St. Mark's Church of England Primary School	714,809	190	3,762	668,570	180	3,714	-46,239	0	20,343	0	20,343	688,913
92200	Compton Church of England Primary School	717,212	185	3,877	697,929	183	3,814	-19,283	0	15,855	0	15,855	713,784
92300	Curridge Primary School	437,935	101	4,336	415,615	99	4,198	-22,321	0	19,457	0	19,457	435,071
92500	Downsway Primary School	830,132	215	3,861	813,885	214	3,803	-16,247	0	776	0	776	814,661
92800	Enborne Church of England Primary School	318,898	61	5,228	328,681	66	4,980	9,783	0	8,773	0	8,773	337,453
92900	Englefield Church of England Primary School	439,321	102	4,307	439,299	107	4,106	-22	0	18,680	0	18,680	457,979
93000	Falkland Primary School	1,563,787	453	3,452	1,601,350	450	3,559	37,563	0	0	0	0	1,601,350
93100	Fir Tree Primary School & Nursery	827,964	197	4,203	781,577	176	4,441	-46,387	0	30,884	0	30,884	812,461
93200	Francis Baily Primary School	1,934,596	550	3,517	2,027,252	568	3,569	92,655	0	0	0	0	2,027,252
93400	Garland Junior School	859,707	216	3,980	852,564	213	4,003	-7,143	3	0	0	3	852,568
93500	Hampstead Norreys Church of England Primary School	396,992	85	4,670	395,161	87	4,542	-1,831	0	10,753	0	10,753	405,914
93600	Hermitage Primary School	761,675	195	3,906	717,593	187	3,837	-44,082	0	18,912	0	18,912	736,505
93700	Hungerford Primary School	1,427,080	384	3,716	1,408,127	389	3,620	-18,953	0	11,884	0	11,884	1,420,010
92700	The Isles' Primary School	330,254	69	4,786	331,053	63	5,255	800	0	0	-2,270	-2,270	328,784
93800	Inkpen Primary School	373,890	79	4,733	337,787	70	4,826	-36,103	0	8,784	0	8,784	346,571
93900	John Rankin Infant & Nursery School	968,875	258	3,755	1,116,658	254	4,396	147,783	0	29,092	0	29,092	1,145,750

Schools Funding Formula 2019/20

Cost Centre	SCHOOL	2018/19 ALLOCATION (including MFG)			2019/20 ALLOCATION (pre MFG)			Change Prior to Transition Adjustments	MFG/CAP on GAINS				Total Funding 2019/20
		Formula	Pupil	Per Pupil	Formula	Pupil	Per Pupil		MFG	Floor	CAP	TOTAL	
		Budget	No's (Oct 2017)	Funding	Budget	No's (Oct 2018)	Funding		100.00%	1.00%	2.0%		
94000	John Rankin Junior School	1,163,923	313	3,719	1,267,124	348	3,641	103,201	12,181	0	0	12,181	1,279,305
94100	Kennet Valley Primary School	830,272	202	4,110	784,606	189	4,151	-45,666	3,520	0	0	3,520	788,126
94200	Kintbury St. Mary's Church of England Primary School	668,224	162	4,125	643,260	164	3,922	-24,964	0	36,441	0	36,441	679,702
94300	Lambourn Church of England Primary School	776,715	184	4,221	893,853	182	4,911	117,137	0	0	0	0	893,853
94400	Long Lane Primary School	802,855	209	3,841	803,510	214	3,755	656	0	6,672	0	6,672	810,182
95800	Mortimer St. Johns Church of England Infant School	689,372	174	3,962	660,867	171	3,865	-28,505	0	9,033	0	9,033	669,899
97500	Mortimer St. Mary's Church of England Junior School	809,931	216	3,750	810,066	220	3,682	134	0	13,279	0	13,279	823,345
94500	Mrs. Bland's Infant & Nursery School	713,942	171	4,175	810,281	165	4,911	96,339	0	12,818	0	12,818	823,099
94600	Pangbourne Primary School	787,563	198	3,978	834,439	199	4,193	46,876	0	5,465	0	5,465	839,904
94700	Parsons Down Infant School	776,478	198	3,922	663,301	168	3,948	-113,177	0	12,195	0	12,195	675,496
94800	Parsons Down Junior School	1,112,981	293	3,799	1,099,096	292	3,764	-13,884	11,341	0	0	11,341	1,110,438
94900	Purley Church of England Primary School	500,872	113	4,432	497,761	112	4,444	-3,111	6,718	0	0	6,718	504,478
95000	Robert Sandilands Primary School & Nursery	965,512	240	4,023	1,045,762	242	4,321	80,250	11,714	0	0	11,714	1,057,477
95100	Shaw-cum-Donnington Church of England Primary School	458,423	90	5,094	403,779	88	4,588	-54,644	0	50,209	0	50,209	453,988
95200	Shefford Church of England Primary School	267,294	39	6,854	317,115	50	6,342	49,821	0	0	-2,869	-2,869	314,246
95300	Speenhamland Primary School	1,112,486	287	3,876	1,137,737	294	3,870	25,250	0	0	0	0	1,137,737
95400	Springfield Primary School	1,107,570	303	3,655	1,156,656	301	3,843	49,085	0	19,433	0	19,433	1,176,089
95500	Spurcroft Primary School	1,695,930	463	3,663	1,670,552	444	3,763	-25,378	0	12,316	0	12,316	1,682,869
95700	St. Finian's Catholic Primary School	723,597	187	3,870	682,114	178	3,832	-41,482	0	1,509	0	1,509	683,623
97700	St. John the Evangelist Infant & Nursery School	687,222	179	3,839	726,748	180	4,037	39,526	0	21,589	0	21,589	748,337
97800	St. Joseph's Catholic Primary School	799,097	202	3,956	809,339	201	4,027	10,242	0	0	0	0	809,339
96200	St. Nicolas Church of England Junior School	948,658	258	3,677	922,479	255	3,618	-26,178	0	16,788	0	16,788	939,268
96100	St. Pauls Catholic Primary School	1,179,790	326	3,619	1,196,104	327	3,658	16,314	0	0	0	0	1,196,104
96300	Stockcross Church of England Primary School	429,810	101	4,256	410,108	100	4,101	-19,702	0	19,155	0	19,155	429,263
96400	Streatley Church of England Voluntary Controlled Primary School	452,118	102	4,433	412,850	94	4,392	-39,268	0	17,247	0	17,247	430,098
96500	Sulhamstead and Ufton Nervet Church of England Voluntary	455,533	107	4,257	441,839	106	4,168	-13,695	0	12,389	0	12,389	454,228
99700	Thatcham Park Church of England Primary School	1,398,584	377	3,710	1,403,689	363	3,867	5,105	23,653	0	0	23,653	1,427,341
96600	Theale Church of England Primary School	1,082,283	298	3,632	1,150,127	306	3,759	67,845	0	45,592	0	45,592	1,195,719
96700	Welford and Wickham Church of England Primary School	423,919	95	4,462	441,821	97	4,555	17,902	0	0	0	0	441,821
96800	Westwood Farm Infant School	718,218	180	3,990	744,423	177	4,206	26,205	0	14,723	0	14,723	759,146
96900	Westwood Farm Junior School	874,977	230	3,804	874,416	232	3,769	-561	0	5,886	0	5,886	880,303
97000	Whitelands Park Primary School	1,185,472	314	3,775	1,264,028	347	3,643	78,556	0	16,859	0	16,859	1,280,887
98700	The Willows Primary School	1,477,386	358	4,127	1,632,139	359	4,546	154,752	17,607	0	0	17,607	1,649,746
99400	The Winchcombe School	1,728,856	430	4,021	1,663,923	438	3,799	-64,932	0	186,108	0	186,108	1,850,031
97300	Woolhampton Church of England Primary School	412,531	92	4,484	386,757	89	4,346	-25,774	0	18,694	0	18,694	405,451
97400	Yattendon Church of England Primary School	357,036	74	4,825	395,565	83	4,766	38,528	0	0	0	0	395,565
98900	Denefield School	4,726,762	951	4,970	4,649,112	961	4,840	-77,650	0	163,604	0	163,604	4,812,716
98800	The Downs School	4,288,376	901	4,760	4,452,872	922	4,830	164,496	0	0	0	0	4,452,872
99000	John O'Gaunt Community Technology College	1,936,459	355	5,455	1,946,345	364	5,347	9,885	0	64,871	0	64,871	2,011,215
99100	Kennet School	6,913,008	1,417	4,879	7,001,248	1,451	4,825	88,240	0	127,488	0	127,488	7,128,736
99200	Little Heath School	6,321,560	1,289	4,904	6,228,788	1,288	4,836	-92,771	0	80,538	0	80,538	6,309,326
99300	Park House School	3,980,540	800	4,976	4,195,872	869	4,828	215,332	0	150,348	0	150,348	4,346,221
99800	St. Bartholomew's School	6,112,235	1,274	4,798	6,383,317	1,313	4,862	271,082	0	0	0	0	6,383,317

Schools Funding Formula 2019/20

Cost Centre	SCHOOL	2018/19 ALLOCATION (including MFG)			2019/20 ALLOCATION (pre MFG)			Change Prior to Transition Adjustments	MFG/CAP on GAINS				Total Funding 2019/20
		Formula Budget	Pupil No's (Oct 2017)	Per Pupil Funding	Formula Budget	Pupil No's (Oct 2018)	Per Pupil Funding		MFG 100.00%	Floor 1.00%	CAP 2.0%	TOTAL	
99500	Theale Green School	2,403,780	461	5,214	2,038,157	400	5,095	-365,623	0	43,789	0	43,789	2,081,946
99900	Trinity School & Performing Arts College	4,190,804	813	5,155	4,368,879	872	5,008	178,076	0	136,651	0	136,651	4,505,530
99600	The Willink School	4,265,965	872	4,892	4,513,766	918	4,917	247,802	0	2,428	0	2,428	4,516,194
PRIMARY TOTAL		52,508,980	13,313	3,944	53,024,951	13,295	3,988	515,971	97,665	973,318	-5,139	1,065,844	54,090,795
SECONDARY TOTAL		45,139,488	9,133	4,942	45,778,358	9,358	4,892	638,870	0	769,717	0	769,717	46,548,075
TOTAL ALL SCHOOLS		97,648,468	22,446	4,350	98,803,309	22,653	4,362	1,154,841	97,665	1,743,035	-5,139	1,835,561	100,638,870



Primary and Secondary Schools Funding Proposed Funding Arrangements for 2019/20

Briefing & Consultation Document for Schools

October 2018

1. Introduction

1.1 The Department for Education (DfE) introduced a National Funding Formula (NFF) from 2018. 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 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 The original intention was that all schools would move to the NFF “hard” formula by 2019. A “hard” formula means that schools will receive their funding allocations direct from the Government using the NFF rates. In 2018 and 2019 the formula would be a “soft” formula which means that the decision is taken locally on how best to allocate this funding to schools through the factors. This “soft” formula has now been extended to 2020.

1.3 Policy and operational documents relating to the 2019 schools budget, and the implementation of the NFF from April 2019. These can be accessed on this webpage:

<https://www.gov.uk/government/publications/national-funding-formula-for-schools-and-high-needs>

- 1.4 Additional funding has been 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; the baseline being 2017/18
- 1.5 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.
- 1.6 This document provides a briefing on the proposed local arrangement for 2019/20. Schools are invited to make comments on five specific areas, as highlighted in boxes within the text. Please e-mail your response to Wendy Howells, Schools' Finance Manager wendy.howells@westberks.gov.uk by **13th November 2018**. 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 (NFF)

- 2.1 The NFF assigns funding rates to each of the current formula factors. For some local authorities these are uplifted by an area cost adjustment (ACA). For West Berkshire this is 1.0341.
- 2.2 In determining the pupil numbers the October census will continue to be used.
- 2.3 Table 1 sets out the national rates.

Table 1: National Funding Formula Rates

Factor	National Rate	WBC National Rate (with ACA)
1.Basic Entitlement:		
Primary	£2,747	£2,841
Secondary KS3	£3,863	£3,994
Secondary KS4	£4,386	£4,535
2.Deprivation:		
Primary current FSM	£440	£455
Primary FSM Ever 6	£540	£558
Primary IDACI Band F (0.2 – 0.25)	£200	£207
Primary IDACI Band E (0.25 – 0.3)	£240	£248
Primary IDACI Band D (0.3 – 0.4)	£360	£372
Primary IDACI Band C (0.4 – 0.5)	£390	£403
Primary IDACI Band B (0.5 – 0.6)	£420	£434
Primary IDACI Band A (over 0.6)	£575	£595
Secondary current FSM	£440	£455
Secondary FSM Ever 6	£785	£812
Secondary IDACI Band F	£290	£300
Secondary IDACI Band E	£390	£403
Secondary IDACI Band D	£515	£533
Secondary IDACI Band C	£560	£579
Secondary IDACI Band B	£600	£620
Secondary IDACI Band A	£810	£838
3.Prior Attainment:		
Primary	£1,022	£1,057
Secondary	£1,550	£1,603
4.English as an Additional Language:		
Primary EAL 3	£515	£532
Secondary EAL 3	£1,385	£1,432
5.Sparsity		
Primary	£25,000	£25,852
Secondary	£65,000	£67,216
6.Lump Sum:		
Primary	£110,000	£113,751

Annex A shows for each school a breakdown per formula factor using the NFF 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.

Schools Funding Formula 2019/20

- Small rural school meeting the sparsity criteria – the pupils live more than two miles from their next nearest school.

2.4 The national formula delivers a minimum per pupil funding of £3,500 per Primary pupil and £4,800 per Secondary pupil. This is taking into account all factors except business rates. All schools will be protected via a funding floor of 1% above their 2017/18 baselines – again taking into account all factors except rates. For schools that gain, a funding cap of 3% per pupil has been allowed for 2019/20 determined locally and excluding the minimum per pupil funding level guarantee.

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 four funding blocks - Schools, Early years, High needs and new for 2018/19 Central Schools 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 is only 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 previous October census).

3.2 The Schools Block is ring fenced, but 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 2019/20 is calculated as follows:

- The national funding formula at the national rates is run for each school. This is based on October 2017 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 1% per pupil increase against their baseline of 2017/18 through the funding floor and a guarantee of a minimum per pupil allocation of £3,500 for Primary pupils or £4,800 for Secondary pupils (all factors excluding rates).
- The allocations for every school in the Local Authority are added up and divided by the October 2017 pupil numbers. This produces a Primary Unit of Funding (£3,899 PUF) and a Secondary Unit of Funding (£4,936 SUF). These funding units are now set for 2019/20.
- In December 2018, the PUF and SUF will be multiplied by the October 2018 Primary and Secondary pupil numbers to produce the Schools Block DSG allocation.

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- A sum for growth funding is added which will be calculated separately for 2019/20 to give the final DSG total.

3.4 It will be unlikely that a local authority would be able 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 2017 census data, whereas actual allocations to schools use October 2018 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 2019/20 amounts – which is likely to be more.
- If there is a significant shortfall in High Needs funding, up to 0.5% could be transferred from the Schools Block allocation.

3.5 Based on the October 2017 census data and pupil numbers, the schools block DSG would be £98.4m. Increases in business rates would need to be deducted, with the balance available to allocate to schools through the formula.

3.6 This figure could go up or down depending on the changes in pupil numbers in the October 2018 census.

3.7 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 2017 (because the funding being received does not recognise this change).

3.8 In addition to agreeing on the funding formula, a decision therefore needs to be taken on how to allocate any surplus or shortfall. The final funding will not be known until mid December and after this consultation has taken place.

4. Proposal for 2019/20 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 2019/20. The only changes in the NFF compared to 2018/19 is the low prior attainment value for Primary allocation which has dropped to £1,022 nationally.

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 NFF rates, or to use all the factors. However, it is the Government's intention that from 2021/22 all schools will be on the NFF.

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4.3 Although it may not be possible 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 use the national rates using all the formula factors. Using either a 0% Minimum funding Guarantee (MFG) and 2% cap on gains or a -0.5% MFG and 3% cap on gains means that the current funding allocation is affordable. The funding floor and MFG will protect schools that lose.

4.3 The models (using 0% MFG and -0.5% MFG) are shown in **Annex C and D**. Both models are affordable (but are subject to changes in business rates). The impact is as follows:

	Option 1 MFG -0.5% Cap 3%	Option 1 MFG - 0% Cap 2%
Number of schools losing	16	2
Number of schools gaining nil	0	16
Gains of £1k - £5k	27	27
Gains of £5k - £15k	12	14
Gains of £15k - £30k	9	8
Gains of over £30k	10	9
Highest Gain	£90,840	£90,840
Average Gain	£13,340	£10,087

4.4 The minimum funding guarantee that can be set in the school formula is between plus 0.5% and -1.5%.

4.5 As was the case last year it is proposed 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.

4.6 The models assume no change in pupil numbers, and thus illustrate the impact of the NFF based on the same details as last year. Actual individual school allocations will be dependent on the October 2018 census data. The model chosen is also available as a spreadsheet, and by entering the school cost centre in the pink 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 2018 (yellow boxes) to see their likely funding for 2019/20 and beyond based on this model.

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4.7 Academies should note that their minimum funding guarantee works in a different way to maintained schools and they will need to apply the funding rates set out in this proposal to their own GAG funding model.

1. Do you agree that West Berkshire should apply the national funding formula rates for every factor, applying a minimum funding guarantee of 0% and funding cap on gains of 2% (as shown in Annex C)? If not, please let us know with your reasons why.
2. Or do you agree that West Berkshire should apply the national funding formula rates for every factor, applying a minimum funding guarantee of -0.5% and funding cap on gains of 3% (as shown in Annex D)?

3. Do you agree that if there is additional funding available the minimum funding guarantee should be set between 0% and 0.5% with the increase in the cap on gains at 3% according to affordability. If not please let us know the reasons why?

4. 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. Do you agree that a top slice should be applied to all schools to support the High Needs Block? If not please let us know the reasons why.

6. If your answer to question 5 is yes – do you agree with the amount as set ie £490k, which is the maximum allowable percentage without application to the Secretary of State? Or do you think the amount should be higher or lower – please let us know your reasons why.

7. If your answer to question 5 is yes – do you think the funding allocated per school should be in proportion to the school's funding as a proportion to total funding or the school's pupil numbers as a proportion to total pupil numbers? Please let us know the 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 need 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 is the subject of a separate report at this meeting.

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.
- 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.

5.3 Funding for the growth fund used to be top sliced from the Schools Block DSG. From 2019/20 this is to be calculated on a formulaic basis which will be based on the October 2018 pupil census. The allocation of the Schools Block formula does not now take the Growth fund into account.

5.4 Any unspent growth funding may be carried forward to the following funding period, as with any other centrally retained budget, and Local Authorities can choose to use it specifically for growth. No changes are proposed

5.5 No changes are proposed to the criteria for the Growth Fund and for the schools with disproportionate number of high needs pupils.

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

6. De-delegations 2019/20 (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,

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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 Intervention Service
- Ethnic Minority & Traveller Achievement Service
- Trade Union Local Representation Service
- 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 was included in a report to the Schools' Forum on 15th October 2018, agenda item 9. The amounts to be deducted from each school for 2019/20 will be different to those shown in the report, as they will be based on the October 2018 census data.

6.4 The final decision on each de-delegation will be made by the relevant Schools' Forum Members for each phase on 10th December 2018. Schools may wish to contact their Schools' Forum representative direct to express their view, or respond as part of this consultation.

6. If you do not agree with any of the above 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 2019/20 is as follows:

Schools' Forum to review the 2019/20 school formula arrangements and agree on a proposal.	15 th October 2018
Briefing document to schools – with opportunity given to make comments on the proposals.	18 th October 2018

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Heads Funding Group to consider the responses from schools and make a recommendation to Schools' Forum.	28 th November 2018
Schools' Forum to agree on the formula and preferred funding rates to recommend to the Council. Vote taken on de-delegations and the criteria agreed for accessing the additional funds.	18 th December 2018
October census data issued by the DfE and final DSG funding allocation for schools and high needs blocks received. Final school formula rates determined according to funding available.	Mid December
Formal Political approval received.	Executive 18 th January 2019
2018/19 formula submitted to Education & Skills Funding Agency.	17 th January 2019
Schools' Forum to consider the overall DSG position and remaining budgets for all funding blocks.	21 st January 2019
Confirmation of final budget allocations to maintained primary & secondary schools	By end of January 2019
Schools' Forum to decide on the final budget for all DSG funding blocks	11 th March 2019

Annexes

Annex A – West Berkshire Schools - National Funding Formula - Funding per Factor

Annex B – Funding Factors 2019/20 – Extract from ESFA Operational Guide

Annex C – Proposed Formula 2019/20 – Proposed Formula Allocation for Individual Schools – using a 0% MFG and 2% Cap on Gains (provided as separate spreadsheet for schools to see their own formula budget allocation detail and for their own modelling purposes)

Annex D – Formula using a -0.5% MFG and 3% Cap on Gains (provided as separate spreadsheet for schools to see their own formula budget allocation detail and for their own modelling purposes)

Annex B

Funding Factors 2019/20 – Extract from ESFA Operational Guide

Funding factor	Description and further information
<p>1. Basic entitlement A compulsory factor</p>	<p>This factor assigns funding on the basis of individual pupils, with the number of pupils for each school or academy based on the October pupil census</p> <ul style="list-style-type: none"> • 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 2018, rather than the October 2017 census • we do not include reception uplift in the national funding formula; local authorities currently using a reception uplift factor should consider whether to do so in 2019 to 2020 • schools with reception uplift will not be financially disadvantaged in the national funding formula calculations, as the funding will remain in their baselines
<p>2. Deprivation A compulsory factor</p>	<p>Local authorities can use free school meals (FSM), the income deprivation affecting children index (IDACI), or both, to calculate the deprivation factor</p> <ul style="list-style-type: none"> • 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

Funding factor	Description and further information
	<ul style="list-style-type: none"> we will 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
<p>3. Prior attainment An optional factor (used by most local authorities)</p>	<p>The prior attainment factor acts as a proxy indicator for low level, high incidence, special educational needs</p> <ul style="list-style-type: none"> we will confirm a separate weighting for new year 7 pupils later in the year <p>We have included more information in the prior attainment section of this guidance.</p>
<p>4. Looked-after children (LAC) An optional factor</p>	<p>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 2018</p> <ul style="list-style-type: none"> we map this data to schools using the January school census to identify the number of LAC in each school or academy we do not use a LAC factor in the national funding formula. Instead, we increased the pupil premium plus rate from 2018 to 2019 from £1,900 to £2,300. Local authorities currently using this factor should consider whether to do so in 2019 to 2020
<p>5. English as an additional language (EAL) An optional factor</p>	<p>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</p> <ul style="list-style-type: none"> 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 we have used three years in the national funding formula; local authorities should consider this when setting their local formula.
<p>6. Pupil mobility An optional factor</p>	<p>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)</p> <ul style="list-style-type: none"> 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)

Funding factor	Description and further information
<p>7. Sparsity An optional factor</p>	<p>Schools that are eligible for sparsity funding must meet two criteria</p> <ul style="list-style-type: none"> • they are located in areas where pupils would have to travel a significant distance to an alternative should the school close • they are small schools <p>factor now allows for a sparsity taper to mirror the methodology used as part of the national funding formula. We have included more information in the sparsity section of this guidance.</p>
<p>8. Lump sum An optional factor (used by all local authorities)</p>	<p>Local authorities can set a flat lump sum for all phases, or differentiate the sums for primary and secondary.</p> <ul style="list-style-type: none"> • 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 a London fringe uplift <p>We have included more information in the lump sum section of this guidance, including information for amalgamated schools.</p>
<p>9. Split sites An optional factor</p>	<p>The purpose of this factor is to support schools that have unavoidable extra costs because the school buildings are on separate sites</p> <ul style="list-style-type: none"> • allocations must be based on objective criteria for the definition of a split site, and for how much is paid <p>We have included more information in the split sites section of this guidance.</p>
<p>10. Rates An optional factor (used by all local authorities)</p>	<p>Local authorities must fund rates at their estimate of the actual cost</p> <ul style="list-style-type: none"> • 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

Funding factor	Description and further information
	rates
<p>11. Private finance initiative (PFI) contracts An optional factor</p>	<p>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.</p> <p>We have included more information in the PFI section of this guidance.</p>
<p>12. London fringe An optional factor, applicable only for five local authorities (Buckinghamshire, Essex, Hertfordshire, Kent, and West Sussex)</p>	<p>The purpose of this factor is to support schools that have higher costs because they are in the London fringe area, and only part of the local authority is in this area. The multiplier is applied to the 6 pupil-led factors, the lump sum factor, and the sparsity factor.</p> <p>The factor can be applied in one of two ways, not both</p> <ul style="list-style-type: none"> • as a multiplier of 1.0156 <ul style="list-style-type: none"> • details of these calculations are in the technical specification for the schools block dataset • as a multiplier of the differential of the area cost adjustment of fringe and non-fringe zones within the local authority <ul style="list-style-type: none"> • this mirrors the national funding formula calculation; the differentials are: <ul style="list-style-type: none"> ▪ Buckinghamshire: 1.0175 ▪ Essex: 1.0335 ▪ Hertfordshire: 1.0302 ▪ Kent: 1.0364 ▪ West Sussex: 1.0561
<p>13. Exceptional premises factors An optional factor</p>	<p>Local authorities can apply to ESFA to use exceptional factors relating to school premises, for example, for rents, or joint-use sports facilities</p> <ul style="list-style-type: none"> • exceptional factors must relate to premises costs • 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 • local authorities can use exceptional premises factors used in 2018 to 2019 (for pre-existing, and newly-qualifying schools) in 2019 to 2020, if the qualification

Funding factor	Description and further information
	<p>criteria are still met</p>
<p>14. Minimum level of per pupil funding for primary and secondary schools An optional factor</p>	<p>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</p> <ul style="list-style-type: none"> • 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 the premises factors that have been excluded from the NFF calculation can do so through the APT and will not need to submit a disapplication <p>We have included the maximum rates for each phase, and more information on setting a minimum per pupil amount in the schools section of this guidance.</p>
<p>15. Funding floor factor An optional factor</p>	<p>The purpose of this factor is to allow local authorities to reflect the NFF calculation of a minimum 1% per pupil increase over 2017 to 2018 baselines</p> <ul style="list-style-type: none"> • if this factor is used all schools within the local authority must be protected against a baseline, even if they were not open in 2017 to 2018 • we will be publishing theoretical baselines for schools which have opened, merged or split since 2017 to 2018; local authorities wishing to amend these theoretical baselines, to take account of local knowledge can do so • the local authority will need to calculate a baseline for new schools that do not have a theoretical baseline

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Central Schools' Services Block Budget 2019/20

Report being considered by: Schools' Forum
On: 21st January 2019
Report Author: Amin Hussain/Melanie Ellis/Ian Pearson
Item for: Decision **By:** All Forum Members

1. Purpose of the Report

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

2. Recommendations

- 2.1 To balance the CSSB by:
- Using 2018/19 underspends totalling £68,155;
 - Releasing £63,649 of unutilised Education Support Grant from Council reserves.

Will the recommendation require the matter to be referred to the Council or the Executive for final determination?	Yes: <input type="checkbox"/>	No: <input checked="" type="checkbox"/>
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3. Introduction

- 3.1 The Schools Funding Regulations for 2018/19 introduced a new Central Schools' Services Block within the Dedicated Schools Grant (DSG). This block consists of centrally retained services:
- Admissions, licences and servicing of Schools' Forum, which were previously funded from the Schools Block, and
 - Education welfare, asset management, and statutory & regulatory duties, which were previously funded from the Education Services grant which was withdrawn in 2017/18.
- 3.2 The CSSB covers funding allocated to Local Authorities (LAs) to carry out central functions on behalf of pupils in state-funded maintained schools and academies in England. All the services funded by this block are statutory and have to be carried out.
- 3.3 The CSSB National Funding Formula (NFF) allocates funding to LAs for ongoing functions using a pupil-led formula. The formula uses two factors, a basic per-pupil factor, through which LAs receive the majority of funding, and a deprivation factor. The pupil counts used to calculate CSSB allocations are LAs' 2019/20 DSG schools block pupil counts.

- 3.4 Total budget for CSSB in 2019/20 is based upon the 2018/19 DSG allocations. 90% of this is through the basic per-pupil factor, the remaining 10% is through the deprivation factor.
- 3.5 The CSSB NFF funding rate for the basic per-pupil factor is the national rate multiplied by their Area Cost Adjustment (ACA), and their resulting allocation for the basic per-pupil factor is then calculated as:
- WBC's funding rate for the basic per-pupil factor, £43.11
multiplied by
 - the WBC's schools block pupil count as given by the 2019/20 DSG allocations, 22,645.
- 3.6 The final allocation of funding for the Central Schools Services Block is £976,226.

4. Budget Requirement and Funding for the Central Schools Services Block

- 4.1 The following table shows the budget requirement for the services that fall within the Central Schools Services Block for 2019/20 compared to 2018/19.

	Central Schools Services Block (CSSB)	2018/19 Budget	2019/20 Budget Requirement	Increase/Decrease	Change
		£	£	£	%
	Budget Requirement:				
1	School Admissions	316,190	243,601	- 72,589	-23%
2	National Copyright Licences	159,610	136,330	- 23,280	-15%
3	Servicing of Schools Forum	70,330	48,729	- 21,601	-31%
4	Education Welfare	273,230	235,981	- 37,249	-14%
5	Statutory & Regulatory Duties:				
a	Provision of Education Data	170,090	210,724	40,634	24%
b	Finance Support for the Education Service	142,883	118,291	- 24,592	-17%
c	Strategic Planning of the Education Service	111,130	114,374	3,244	3%
	Total Budget Requirement	1,243,463	1,108,030	- 135,433	-11%

- 4.2 Overall, costs have been reduced by 11% or £135k. Capita One costs have been reallocated on a revised basis, which accounts for the increase in 5a) Provision of Education Data, which is offset by decreases in line 1 Admissions, and line 4, Education Welfare. There have been staff reductions in Admissions, Servicing of the Schools' Forum and in Finance support.
- 4.3 The grant funding for the CSSB is £976k, leaving a shortfall of £132k. Proposals to balance the block are shown in the table below, with a comparison to 2018/19:

Central Schools Services Block (CSSB)	2018/19 Budget	2019/20 Budget Requirement
	£	£
Total Budget Requirement	1,243,463	1,108,030
Funding:		
Central Schools Services Block DSG	- 992,560	- 976,226
Early Years Block transfer	- 27,053	
High Needs Block transfer	- 32,850	
One off Council funding	- 191,000	-
Copyright underspend 18/19 & 17/18 cf		- 53,155
Capita 1 underspend 18/19		- 15,000
Release of ESG unutilised grant		- 63,649
Total Funding	- 1,243,463	- 1,108,030

- 4.4 In 2018/19, the block shortfall was £251k and was balanced by transfers from Early Years and High Needs blocks and one off Council funding.
- 4.5 For 2019/20, costs have been brought down by £135k mostly by staffing reductions, however the grant has reduced by £16k. This leaves a funding shortfall of £132k, and it is proposed to balance this by using underspends from 2018/19 and releasing unutilised ESG funding from Council reserves.
- 4.6 For 2020/21, it is anticipated that costs will need to reduce further to bring the block into balance.
- 4.7 The cost of copyright license for schools is determined by the relevant national agencies. Details of all the other services included in the Central Schools Services Block (including a breakdown of costs) is given in appendix A.

5. Conclusion

- 5.1 The proposals in Section Two should be discussed and a decision made whether to recommend the proposals to Schools Forum on 21 January 2019.

6. Appendices

- 6.1 Appendix A - Details and Costs of the Central Schools' Services

Details and Costs of Central Schools' Services

	Number of Posts	% Charged to CSSB	2019/20 £
School Admissions			
Description of Statutory Duties covered			
Administration of admissions process for maintained schools and academies			
Staffing Structure			
Service Manager	1.00	5%	
Admissions and Transport Manager	1.00	95%	
Admissions Officers	2.50	95%	
Education Place Planning Team Leader	1.00	10%	
Breakdown of Costs			
Staff salary costs			159,460
Employee Expenses			18,700
Supplies and Services			7,990
Capita One recharge			23,879
Support Service Recharges			33,572
TOTAL ELIGIBLE EXPENDITURE FOR ADMISSIONS			243,601

	Number of Posts	% Charged to CSSB	2019/20 £
Servicing the Schools Forum			
Description of Statutory Duties covered			
Setting agendas, minute taking, co-ordination and distribution of papers for Schools Forum and its sub groups			
Staffing Structure			
Head of Education	1.00	10.00%	
Schools Finance Team	3.36	5% to 10%	
Schools Forum Clerk			
Breakdown of Costs			
Staff salary costs			41,090
Room hire, consumables and members expenses			1,260
Support Service Recharges			6,379
TOTAL ELIGIBLE EXPENDITURE FOR SERVICING THE SCHOOLS FORUM			48,729

	Number of Posts	% Charged to CSSB	2019/20 £
Education Welfare			
<u>Description of Statutory Duties covered</u>			
Tracking of children who can be legally removed from the school roll.			
Monitoring of elective home education.			
Issuing and monitoring of child work permits and performance licences.			
Attendance at core group meetings for specific pupils			
Advice on keeping registers			
Progress cases to court where appropriate. Maintain up to date knowledge of legal processes and			
<u>Staffing Structure</u>			
Principal Education Welfare Officer	1.00	90%	
Senior Education Welfare Officer	0.40	90%	
Education Welfare Officers	4.30	35%	
Assistant Education Welfare Officer	1.00	100%	
Administrative Assistant	0.40	100%	
<u>Breakdown of Costs</u>			
Staff salary costs			172,532
Employee expenses/car allowances			16,220
Other non staffing costs			4,420
Income from fines			-9,770
Capita One Recharges			10,613
Support Service Recharges			41,966
TOTAL ELIGIBLE EXPENDITURE FOR EDUCATION WELFARE			235,981

	Number of Posts	% Charged to CSSB	2019/20 £
Provision of Education Data			
<u>Description of Statutory Duties covered</u>			
Statutory returns to DfE			
Data analysis and reporting e.g. Exam results, performance			
School census administration and reports			
<u>Staffing Structure</u>			
Staffing	2.00	100%	
<u>Breakdown of Costs</u>			
Staff salary costs			88,820
Capita One recharge			105,118
Support Service Recharges			16,786
TOTAL ELIGIBLE EXPENDITURE FOR PROVISION OF EDUCATION DATA			210,724

	Number of Posts	% Charged to CSSB	2019/20 £
Finance Support for the Education Service			
<u>Description of Statutory Duties covered</u>			
DSG services budget preparation, monitoring, and year end			
Education services budget preparation, monitoring, and year end			
School funding formula and early years funding formula			
Administration of funding allocations to all schools for early years and high needs			
Statutory returns e.g. APT, S251, CFO deployment of DSG			
<u>Staffing Structure</u>			
DSG Accountant	0.65	65%	
Education Finance Manager	1.00	35%	
Senior Accountant - Education	0.76	90%	
Accountant - Education	0.50	100%	
<u>Breakdown of Costs</u>			
Staff salary costs			88,915
Support Service Recharges			29,376
TOTAL ELIGIBLE EXPENDITURE FOR FINANCE SUPPORT			118,291

Strategic Planning of the Education Service			
<u>Description of Statutory Duties covered</u>			
Strategic planning and management of the Education service as a whole			
<u>Staffing Structure</u>			
Head of Education	1.00	80%	
Other staffing			
<u>Breakdown of Costs</u>			
Staff salary costs			103,320
Other staff costs			3,500
Support Service Recharges			7,554
TOTAL ELIGIBLE EXPENDITURE FOR PLANNING OF EDUCATION SERVICE			114,374

High Needs Block Budget 2019/20

Report being considered by:	Schools' Forum		
On:	21 st January 2019		
Report Author:	Ian Pearson, Michelle Sancho, Jane Seymour		
Item for:	Decision	By:	All Forum Members

1. Purpose of the Report

1.1 This report sets out the current financial position of the high needs budget for 2018/19 and the position known so far for 2019/20, including the likely shortfall.

2. Recommendation

2.1 To note the predicted shortfall and consider options for savings.

Will the recommendation require the matter to be referred to the Council or the Executive for final determination?	Yes: <input type="checkbox"/>	No: <input checked="" type="checkbox"/>
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3. Introduction

3.1 Setting a balanced budget for the High Needs Block continues to be a significant challenge; funding received for this block has only seen minimal increases for several years, yet the demand in terms of numbers of high needs pupils and unit costs of provision has continued to rise. Place funding has remained static in spite of increasing numbers, and in 2015/16 local authorities took on responsibility for students up to the age of 25 with SEND in FE colleges without the appropriate funding to cover the actual cost. The number of children with EHCPs is increasing, mainly, but not entirely due to the change in age range up to 25 years.

3.2 Up until 2016-17, West Berkshire was setting a balanced high needs budget. Since then, the budget has been under pressure on an annual basis, with savings identified each year to reduce the overspend. A decision was made to set a deficit budget for the first time in 2016/17.

3.3 Savings of £219k were implemented in 2017/18 and a further £306k in 2018/19. Despite these savings a budget was set in 2018/19 which included a planned overspend of £703k. This budgeted over spend has been revised to £447k as a result of a better than forecast deficit brought forward from 2017/18.

3.4 The pressure on the high needs block is a national issue, and many local authorities have significant over spends and have also set deficit budgets. South East regional benchmarking data shows that in West Berkshire overspending on the HNB as a % of the total HNB budget is one of the lowest in the region, but nevertheless it is an issue of ongoing concern.

3.5 Tables 2, 3, 4 and 5 in Appendix A show where the predicted 2019-20 costs exceed 2018-19 budgets.

3.6 The net shortfall in the 2019-20 HNB budget, as estimated at this stage, is £2.6m. This includes an overspend of £876k which is forecast to be transferred to reserves in 2018/19 and paid back in of £876K in the next financial year.

3.7 An extensive review of SEN provision and services took place during 2018, with full involvement of all stakeholders, including parents and schools. This resulted in a new 5 year SEND Strategy for West Berkshire which was approved by West Berkshire Council and the Berkshire West Clinical Commissioning Group in November 2018. The Strategy seeks to address rising costs in the High Needs Block. It has 5 key priority areas:

- Improve the capacity of mainstream schools to meet the needs of children with SEND
- Expand local provision for children with SEND in order to reduce reliance on external placements
- Improve post 16 opportunities for young people with SEND, including better access to employment
- Improve preparation for adulthood, including transition from children's to adults' services in Social Care and Health
- Improve access to universal and targeted Health services for children with SEND

3.8 Work is now under way to implement the strategy, which should achieve savings in the High Needs Block over the next five years, but savings will take time to be realised. It is likely that in the short term (starting in 2020-21) costs will actually increase whilst new provision is being set up, as there will be an element of double funding whilst new provision grows before out of area placements start to reduce.

3.9 Details of the services paid for from the high needs budget and the corresponding budget information are set out in Appendix A, together with an explanation of the reasons for budget increases.

4. Summary Financial Position

4.1 The latest estimate of expenditure in the High Needs Block budget for both 2018/19 and 2019/20 is set out in Table 1. This will continue to be refined over the next few months, particularly in relation to the largest variable element, which is top up funding. The figures are based on all services continuing at current staffing levels and contract costs, with no change in the funding rates for top ups and the current/known number and funding level of pupils.

4.2 Most of the DSG allocation for the high needs block is now confirmed. Part of it is estimated and will be based on the actual number of pupils in special schools in the October 2018 census, and import/export adjustments based on the January 2019 census and February 2019 ILR. A funding increase of 1% on the 2017 baseline is expected in 2019/20.

4.3 The Department of Education announced in December 2018 an additional £381k of high needs funding for 2018-19 and 2019-20 in recognition of the cost pressures that Local Authorities are experiencing on the high needs block. This has been included in the forecast figure.

TABLE 1	2018/19 Budget £	2018/19 Forecast £	2019/20 Estimate £	2020/21 Estimate £
Place Funding	5,841,830	5,841,830	6,062,000	6,062,000
Top Up Funding	11,227,150	11,033,411	11,921,930	11,921,930
PRU Funding (Top Ups Only)	542,950	884,030	1,089,100	1,089,100
Other Statutory Services	1,262,500	1,431,900	1,434,680	1,434,680
Non Statutory Services	774,320	780,120	801,470	801,470
Support Services Recharges	127,290	127,290	127,290	127,290
Total Expenditure	19,776,040	20,098,581	21,436,470	21,436,470
HNB DSG Allocation - confirmed	-19,664,777	-19,557,777	-18,921,309	-18,921,309
HNB DSG Allocation - estimated			-768,000	-768,000
Additional high needs funding	-381,000	-381,000	-381,000	
Transfer to Other Blocks	27,000	27,000		
HNB DSG Overspend from previous year	308,635	308,635	495,439	1,861,600
Total DSG Funding	-19,710,142	-19,603,142	-19,574,870	-17,827,709
Shortfall	65,898	495,439	1,861,600	3,608,761

4.4 There is a forecast shortfall of **£1.86m** in the 2019/20 HNB which may change as the budgets are finalised. The position will be clearer at the time of the next report to the Heads Funding Group / Schools Forum, both in terms of the 2018-19 out turn ie over spend and also the 2019-20 budget requirements. However, there will be a significant shortfall in the budget which will need to be addressed.

Appendix A sets out the detail of the budgets included within the High Needs Block, and the reasons for the pressure on the 2019-20 HNB budget. Options for savings are included in Appendix B.

5. Appendices

Appendix A – High Needs Budget detail

Appendix B – Saving Proposals

Appendix C – Impact Data

Appendix D – Paper on HNB from Headteacher representative on Schools Forum

High Needs Budget Detail

1. PLACE FUNDING – STATUTORY

- 1.1 Place funding is agreed by the Education and Skills Funding Agency (ESFA) and has to be passed on to the institution, forming their base budget. Academy and post 16 places are included in the initial HNB allocation but the agreed place numbers are then deducted and paid to the institution direct (DSG top slice). From 2018/19 pre 16 resource unit place funding is reduced from £10,000 to £6,000 per place, and each pupil within the unit is included in the main school formula funding allocation.
- 1.2 The ESFA will not fund any overall increases to places. If additional places are needed in academies or post 16 institutions, a request can be made to the ESFA. However, any additional places agreed would be top sliced from West Berkshire's HNB allocation in 2019-20.
- 1.3 Requests have been made for the following:
- 1 additional place at West Berkshire Training Consortium to reflect actual student numbers
 - 1 additional place at the Trinity ASD Resource to reflect actual pupil numbers.
 - 43 additional places at Newbury College to reflect actual student numbers.
- 1.4 The reason it has been necessary to request a significant increase in planned places for Newbury College is that new regulations require the Local Authority in which an FE College is based to pay for planned places for all students with high needs, regardless of where they are resident. An import / export adjustment will be made to the HNB in 2019-20 based on January census data, so this funding should be recouped from the relevant Local Authorities.
- 1.5 It should be noted that the Fir Tree ASD Resource continues to grow in size and is likely to need more than its current 5 planned places. Additional places have not been requested from the ESFA *as it is not yet clear how many places will be needed for September 2019?* Any additional places needed will be funded from the top up budgets.
- 1.6 The actual number of places occupied in West Berkshire's special schools is greater than the planned places which are funded. There continues to be an increase in demand for places in special schools. **Table 1** currently shows no increase to special school planned places, as there is no additional planned place funding to allocate unless there is surplus planned place funding in other institutions which can be reallocated. If no place funding can be released from other institutions, and if it is decided that additional planned places should be funded at the special schools, this is a pressure on the High Needs Block.

TABLE 1 – Place Funding Budgets	2018/19 Budget			2019/20 Estimate		
	No. of Places Funded	£	Current No. of Pupils	Proposed No. of Places Funded for 19/20	£	Difference in number of places
Special Schools – pre 16 (90540)	286	2,860,000	-296	286	2,860,000	0
Special Schools – post 16 (DSG top slice)	79	790,000	-94	79	790,000	0
Resource Units Maintained – pre 16 (90584)	35	242,000	-30	35	210,000	0
Resource Units Academies – pre 16 (DSG top slice)	95	599,830	-89	96	576,000	1
Mainstream Maintained – post 16	8	40,000	-5	5	30,000	-3
Mainstream Academies – post 16 (DSG top slice)	13	80,000	-11	13	78,000	0
Further Education	95	570,000	-149	139	858,000	44
PRU Place Funding (90320)	66	660,000	-66	66	660,000	0
TOTAL	677	5,841,830	-740	719	6,062,000	42

2. TOP UP FUNDING – STATUTORY

2.1 Top up funding is paid to the institutions where we are placing pupils who live in West Berkshire (we do not pay our institutions top up funding for pupils who live outside West Berkshire). **Table 2** shows the budget and forecast for 2018/19 and the estimate for 2019/20.

TABLE 2	2017-18 Budget		2018-19 Budget			2019-20 Estimate	Difference 18-19 budget & 19-20 prediction
	Budget £	Outturn £	Budget £	Forecast £ (Month 09)	Over/ (Under) £	Estimate £	
Special Schools Maintained (90539)	3,237,280	3,262,595	3,300,420	3,372,050	71,630	3,463,450	163,030
Non WBC special schools (90548)	1,086,890	1,050,611	1,098,070	959,970	-138,100	968,130	-129,940
Resource Units Maintained (90617)	202,620	240,168	293,020	276,890	-16,130	270,350	-22,670
Resource Units Academies (90026)	768,370	723,750	854,270	808,580	-45,690	946,530	92,260
Resource Units Non WBC (90618)	55,000	105,340	107,000	147,260	40,260	160,190	53,190
Mainstream Maintained (90621)	534,010	574,177	541,560	648,221	106,661	666,360	124,800
Mainstream Academies (90622)	191,410	193,660	185,170	244,810	59,640	267,460	82,290
Mainstream Non WBC (90624)	66,960	78,694	75,000	80,330	5,330	66,480	-8,520
Non Maintained Special Schools (90575)	891,130	717,499	840,100	804,040	-36,060	981,570	141,470

TABLE 2 - continued	2017-18 Budget		2018-19 Budget			2019-20 Estimate	
Top Up Budgets	Budget £	Outturn £	Budget £	Forecast £ (Month 09)	Over/ (Under) £	Estimate £	Difference 18-19 budget & 19-20 prediction
Independent Special Schools (90579)	2,012,700	1,954,571	2,436,400	2,348,460	-87,940	2,652,250	215,850
Further Education (90580)	1,309,980	1,155,852	1,396,140	1,269,330	-126,810	1,379,160	-16,980
Disproportionate HN Pupils (90627)	100,000	100,972	100,000	73,470	-26,530	100,000	0
TOTAL	10,456,350	10,157,889	11,227,150	11,033,411	-193,739	11,921,930	694,780

2.2 Most top up budgets are under pressure, with the type of placement creating the greatest pressure shown below in order of cost.

- Independent special schools
- West Berkshire maintained special schools
- Non maintained special schools
- Resourced units in academies

2.3 The predictions of cost for 2019-20 take in to account known pupils whose needs can no longer be met in local schools, together with some cases which are due to go to the SEND Tribunal. It is not possible to predict all pupils who may need placements in 2019/20. The figures assume a middle ground between the best case scenario and the worst case scenario (financially) in terms of Tribunal outcomes.

2.4 Independent and non-maintained special schools

Both of these budgets are currently underspent, but will be under pressure in 2019-20. This is partly due to the full year costs of placements made during 2018-19 hitting the budget in 2019-20. There was also one case upheld by the SEND Tribunal with an annual cost of over £100,000. Pressure continues to be mainly for SEMH and ASD placements, plus some HI placements.

2.5 West Berkshire maintained special schools

This pressure reflects both increasing numbers in our special schools and the need to compensate for inadequate planned place funding through the top up budget.

2.6 Resourced units in academies

This pressure is mainly due to numbers at Trinity and Fir Tree ASD resources growing, as planned. These additional pupils may have been otherwise placed in more expensive special school placements. In fact it is likely that the decrease in non-West Berkshire special school placement costs is partly attributable to the increasing numbers in these provisions.

2.7 EHCPs in maintained mainstream schools and academies

There is also pressure on the budgets for EHCPs in mainstream schools (both maintained and academies). This relates more to an increase in the average cost of

an EHCP in a mainstream school, rather than a very significant increase in overall numbers of EHCPs.

2.8 Non West Berkshire resourced units

This increase is mainly created by increasing use of an ASD Resource in Bracknell for young people whose needs cannot be met in our own ASD Resourced units. These placements are more cost effective than specialist ASD school placements.

2.9 Non West Berkshire special schools

Costs against this budget have been going down, due to two pupils leaving a special free school, one to be electively home educated and one to attend a PRU. Additionally, two pupils have been placed at the Fir Tree and Trinity ASD Resources who would otherwise have attended a special free school.

2.10 Resourced units in West Berkshire maintained schools

These costs have been reducing slightly, due to smaller numbers than expected in the Winchcombe Speech and Language Resource and some movement of children out of the West Berkshire area from other resourced units.

2.11 FE Colleges

There is a current underspend of £126, 810 on this cost centre. This is due to three post 16 high needs pupils being supported in alternative provision. However this needs to be treated with caution as FE Colleges are only just returning their 18-19 student numbers. We are not recommending reducing this budget by as much as the current underspend as we are predicting three possible Independent Specialist FE Placements for September 2019. Based on current predictions, the recommendation is that this budget is reduced by £16,980.

We are looking to open a new post 19 provision in conjunction with the Castle School. The course would be a supported internship with the aim that pupils on the course move into employment after one year. The top up effect should be neutral as the pupils would have received equivalent top up at FE College.

2.12 EHCPs in Non West Berkshire mainstream schools

These costs should be slightly reduced next year due to two pupils in non-West Berkshire mainstream schools moving to special schools. However, it is a budget which is based on a small group of pupils and can fluctuate significantly.

3. PUPIL REFERRAL UNITS (PRU) – STATUTORY

3.1 **Table 3** shows the budgets for PRU top ups.

TABLE 3	2017/18 Budget		2018/19 Budget			2019/20	Difference 18/19 budget & 19/20
	Budget £	Outturn £	Budget £	Forecast £ (Month 09)	Over/ (under) £	Estimate £	
PRU top up Budgets							
PRU Top Up Funding (90625)	875,870	1,086,906	542,950	757,700	214,750	757,700	214,750
PRU EHCP Pupils (90628)	0	0	0	126,330	126,330	331,400	331,400
Non WBC PRU Top Up Funding (90626)	0	0	0	0	0	0	0
TOTAL	875,870	1,086,906	542,950	884,030	341,080	1,089,100	546,150

3.2 The current year budget was based on schools making an agreed 80% contribution for pupils that they placed. Permanent exclusions and sixth form are funded 100% by the High Needs Block less the average pupil led funding contribution recovered from schools. The estimate for 19/20 PRU Top Up Funding is based on the current year forecast as at period 7. The 18/19 forecast is based on an estimate of the current mix of placements. Further details can be found in a separate report.

3.3 The number of pupils with EHCPs being placed in PRUs is increasing as this can be an appropriate and cost effective provision for some young people. Under the new funding arrangements for PRUs these placements have to be funded from the SEN budget. Our estimate of these costs is £331,400 for 2019-20. However, these placements are more cost effective than independent and non-maintained special school placements.

4. OTHER STATUTORY SERVICES

4.1 **Table 4** details the budgets for other statutory services.

TABLE 4 Other Statutory Services	2017/18 Budget		2018/19 Budget			2019/20	Difference 18/19 budget & 19/20
	Budget £	Outturn £	Budget £	Forecast £ (Month 09)	Over/ (under) £	Estimate £	
Applied Behaviour Analysis (90240)	76,000	52,850	75,000	114,440	39,440	90,820	15,820
Sensory Impairment (90290)	215,710	221,312	172,750	246,330	73,580	236,000	63,250
Engaging Potential (90577)	455,160	456,177	456,000	491,670	35,670	527,150	71,150
Equipment for SEN Pupils (90565)	10,000	3,397	0	0	0	10,000	10,000
Therapy Services (90295)	267,460	266,257	240,760	261,470	20,710	261,470	20,710
Elective home Education Monitoring (90288)	27,660	23,482	27,990	27,990	0	28,240	250
Home Tuition Service (90315)	345,000	320,100	245,000	245,000	0	245,000	0
Hospital Tuition (90610)	45,000	1,646	45,000	45,000	0	36,000	-9,000
TOTAL	1,441,990	1,345,221	1,262,500	1,431,900	169,400	1,434,680	172,180

4.2 Applied Behaviour Analysis (ABA)

4.2.1 This budget supports a small number of children with EHC Plans for whom the Authority has agreed an ABA programme. ABA is an intensive intervention programme for children with autism which aims to modify behaviours which are typical of ASD in order to allow children to function more successfully in school and in society.

4.2.2 This budget also covers the cost of children with EHC Plans accessing other bespoke educational packages where this is the most appropriate and cost effective way of meeting their needs including SEN Personal Budgets.

4.2.3 The increase in costs represents a small number of children with ASD and high levels of anxiety who were school refusers and required a bespoke package to support elective home education provided by parents.

4.3 **Sensory Impairment**

4.3.1 Support for children with hearing, visual and multi-sensory impairments is purchased from the Berkshire Sensory Consortium Service. This includes support from qualified teachers of HI and VI, audiology and mobility support.

4.3.2 This budget is under pressure because of an increase in the number of children with severe hearing and visual impairments who require a high level of visits from teachers of the deaf / visually impaired.

In 2017 there were 154 in total on the caseload (HI and VI combined). This included both children with and without EHCPs. In 2018 there were 175 on the caseload, an increase of 21 or 14%. What is even more significant is the increase (within the overall increase) of children with severe and profound HI or VI who need the highest level of support on the Sensory Consortium Service matrix. In particular, there has been an increase from 6 to 15 children with very severe VI – these children need an extremely high level of support (eg, braille teaching) to be maintained in mainstream schools. They would obviously be much more costly if placed in specialist VI schools.

4.4 **Engaging Potential**

4.4.1 Engaging Potential is an independent special school commissioned to provide alternative educational packages for 14 young people in Key Stage 4. Students placed at Engaging Potential are those who have Statements or EHC Plans for social, emotional and mental health difficulties and whose needs cannot be met in any other provision. This can include young people who have been excluded from specialist SEMH schools. The unit cost of a place represents good value for money compared to other independent schools for SEMH which typically start at around £70K per annum. The increase in cost for 2019-20 relates to reduced income for young people placed by other Local Authorities.

4.5 **Equipment for SEN Pupils**

4.5.1 This budget used to fund large items of equipment such as specialist chairs and communication aids for pupils with EHC Plans. The budget has been reduced a number of times in previous HNB savings programmes and was removed entirely in 2018-19 on the basis that schools would meet these costs. However, this created a pressure for nurseries as they do not have delegated SEN budgets, and for resourced schools which have a disproportionate number of children with specialist equipment needs. It was agreed in 2018-19 that a one off amount of £10,000 would be made available to meet these needs. It is recommended that a £10,000 per annum budget is restored for this purpose.

4.6 **Therapy Services (Contract with Berkshire Healthcare Foundation Trust)**

4.6.1 The therapy services budget covers the costs for children with SEN who have speech and language therapy or occupational therapy in their EHC Plans.

4.6.2 Therapy services are provided by the Authority solely to children who have the need for a service stipulated and quantified in their EHC Plan. It is a statutory duty for the Local Authority to provide these therapies in these circumstances.

4.6.3 A number of reductions have been made to this budget in previous HNB savings programmes. In 2018-19 this budget was reduced in anticipation of a 10% reduction in the contract cost but only a 5% reduction was achieved, so there is a pressure for 2019-20.

4.7 Elective Home Education Monitoring

4.7.1 The Elective Home Education monitoring sits in the Education Welfare and Safeguarding Service and consists of one part time teacher who monitors children who are electively home educated. There is a statutory duty to monitor arrangements for EHE made by parents. Elective Home Education numbers are growing, both locally and nationally. This may be a pressure in due course.

4.8 Home Tuition

4.8.1 The Home Tuition Service is a statutory service providing home tuition to children with medical conditions and illness that prevent them accessing full-time school. It is currently commissioned by WBC from the iCollege.

4.8.2 Details of changes to this service will be brought to the next cycle of meetings.

4.9 Hospital Tuition

4.9.1 Hospital tuition is a recent addition to HNB funding. WBC is now obliged to pay the educational element of specialist hospital placements, usually for severe mental health issues. These placements are decided by NHS colleagues and we have no influence over the placement or duration of stay. We are negotiating with the settings to ensure we are only charged for the education a young person actually receives and would benefit from. As numbers and costs are impossible to predict, it is proposed that the 2019-20 budget is based on the 2018-19 projected spend.

5. NON STATUTORY Services

5.1 **Table 5** details the non statutory service budgets for 2017/18, 2018/19 and estimates for 2019/20. The latest forecast is that in the majority of cases these budgets should be on-line, other than the LAL Service (see paragraph 5.3 below). These services are non statutory so there is more potential scope to make savings, although a reduction in any of these budgets is likely to increase pressure on statutory budgets.

5.2 The table shows the budget for these services in 2019/20 assuming that the services continue and there are no changes to staffing levels.

5.3 The LAL budget was reduced by 50% in 2018-19 on the basis that schools would pay 50% of the cost of these places. As a result of charging being introduced, referrals to LALs reduced for the first time. Only 33 of 48 places were taken up, resulting in a shortfall in income. Assuming that the status quo remains, and charging continues at 50% in 2019-20, and assuming that the rate of take up would be similar next year to this, there would be a shortfall of approximately £16,000 in 2019-20.

TABLE 5	2017/18 Budget		2018/19 Budget			2019/20	
Non Statutory Services	Budget £	Outturn £	Budget £	Forecast £ (Month 9)	Over/ (under) £	Estimate £	Difference 18/19 budget & 19/20
Language and Literacy Centres LALs (90555)	116,200	116,200	82,400	91,700	9,300	98,400	16,000
Specialist Inclusion Support Service	50,000	50,000	50,000	50,000	0	50,000	0
PRU Outreach Service (90582)	77,000	77,000	61,200	61,200	0	61,200	0
SEN Pre School Children (90238)	In Early Years	0	0	0	0	0	0
Cognition & Learning Team (90280)	311,840	314,449	319,170	315,670	-3,500	325,660	6,490
ASD Advisory Service (90830)	139,560	139,567	141,550	141,550	0	146,210	4,660
Vulnerable Children (90961)	63,980	63,980	50,000	50,000	0	50,000	0
Early Development and Inclusion Team	40,000	40,000	40,000	40,000	0	40,000	0
Dingley's Promise (90581)	0	0	30,000	30,000	0	30,000	0
TOTAL	798,580	801,196	774,320	780,120	5,800	801,470	27,150

5.4 Language and Literacy Centres (LALs)

5.4.1 This budget funds the primary LALs at Theale and Winchcombe schools. The LALs provide intensive literacy support for primary children with severe specific literacy difficulties. 48 places per year are available across the two LALs.

5.4.2 See also paragraph 5.3 above.

5.5 Specialist Inclusion Support Service

5.5.1 This service provides outreach support from West Berkshire's special schools to mainstream schools to support the inclusion of children with learning and complex needs in their local mainstream schools.

5.5.2 This budget has been subject to reductions in the previous financial years with the special schools providing the service absorbing the cost.

5.6 PRU Outreach

5.6.1 The PRU Outreach Service offers consultancy / outreach support mainly to students who have been attending the iCollege and are starting to attend a mainstream school. Schools may request Outreach for any pupil causing concern but it is dependent on capacity.

5.7 SEN Pre School Children

5.7.1 This budget provides one to one support to enable children with SEN to access non maintained and voluntary pre- school settings.

5.8 Cognition and Learning Team

5.8.1 The Cognition and Learning Team (CALT) provides advice, support and training to mainstream schools to help them to meet the needs of children with SEN. Staff are experienced SENCOs with higher level SEN qualifications.

5.8.2 Many primary schools are reliant on this service to supplement their own SEN provision and expertise, especially schools where the Head has to act as SENCO or where there is an inexperienced SENCO.

5.8.3 This is a partially traded service. All schools receive a small amount of free core service, but the majority of support now has to be purchased by schools.

5.9 ASD Advisory Service

5.9.1 The ASD Advisory Service provides advice, support and training for mainstream schools on meeting the needs of children with Autistic Spectrum Disorder. The purpose of the service is to enable children with ASD to be successfully included in mainstream schools wherever possible.

5.9.2 The context for this service is vastly increasing numbers of children with ASD diagnoses and mainstream schools having more and more difficulty meeting the needs of these children. The majority of our placements in non West Berkshire special schools, independent special schools and non maintained special schools are for children with ASD.

5.10 Vulnerable Children

5.10.1 The Vulnerable Children Fund is a small budget used to help schools support their most vulnerable pupils on an emergency, unpredicted or short term basis.

5.10.2 The budget has gradually been reduced from £120K over the past few years. The criteria have strengthened, with funding allocated for shorter periods and fewer extensions. However this is a well used resource that helps schools support vulnerable pupils with complex needs.

5.11 Early Development and Inclusion Team

5.11.1 The service comprises of 1.7 teachers who are specialists in early years and SEND. Children under 5 who are identified by Health professionals as having significant SEND are referred to this service. Staff initially visit children in their homes (if they are not yet in an early years setting) in order to promote their educational development and model strategies and resources for parents to use to support their child's progress.

5.11.2 EDIT teachers also assist with the transition to early years settings and schools, providing support and training for staff to help them to meet the child's needs, and continuing to visit for a period of time to provide ongoing support and advice. They also help to coordinate support which the family is receiving from other professionals.

5.11.3 The service is currently supporting approximately 100 children. It has been reduced in size in recent years from 3.4 to 1.7 staff.

5.12 Dingley's Promise

5.12.1 Dingley's Promise is a charitable organisation which provides pre school provision for children under 5 with SEND in West Berkshire, Reading and Wokingham. It is the only specialist early years SEND setting in the private, voluntary and independent early years sector in West Berkshire. It provides an alternative to mainstream early years settings, where experience and expertise in SEND can vary greatly. Parents are able to take up their early years entitlement at Dingley's Promise, rather than at a mainstream early years setting, if they wish. However, Dingley's Promise are only able to claim the standard hourly rate for providing the early years entitlement as mainstream settings, in spite of offering specialist provision, higher ratios and more one to one support.

5.12.2 Historically, Reading and Wokingham Local Authorities gave grants to Dingley's Promise from their HNB budgets to top up the hourly rate, in recognition of their specialist offer, but West Berkshire did not. In 2017-18, the service was running at a loss and there was a risk it would cease to be viable in this area without some Council funding. Dingley's Promise as an organisation is active in funding raising and seeking grants but these sources of funding are unreliable. It was agreed in 2018-19 that a grant of £30,000 would be made to Dingley's Promise in order to maintain the service in this area.

5.12.3 An option would have been to place these children at our maintained special schools as an alternative to supporting Dingley's Promise, but this would have had the following disadvantages:

- We would still need to provide planned place and top up funding to the special school for these children
- This would increase numbers in our special schools both in the short term and the longer term, at a time when there is already significant pressure for places
- Parents may not yet be ready to consider special school for their child

5.12.4 If Dingley's Promise had closed, children may have been admitted to mainstream early years settings which might have struggled to meet their needs. Alternatively, parents may have chosen to keep them at home until they reached statutory school age, which could have result in primary schools receiving children with SEND who were ill prepared for the transition to school. Parents may also sought EHC Plans earlier than they might otherwise have done, with associated costs to the HNB budget.

Savings Proposals

6. Option 1 - Language and Literacy Units (LALs)

LALs offer specialist part time provision for primary pupils with significant specific literacy difficulties.

In 2018-19 a decision was taken to introduce a charge for LALs of £1300 per place. This has resulted in a drop in referrals and only 33 of 48 places being filled. Some Headteachers have written to express the view that the decision to charge for LAL places should be reversed as they cannot afford to place children who require the specialist provision.

See Appendix C(v) for a report from the LAL teachers in charge about the implications of charging.

There are a number of potential options for the LALs (including variations not listed here).

- Remove LAL charging, as requested by some Headteachers. This would generate a funding pressure of £33,800.
- Reduce LAL charging to 25% of the cost of a place. This would create a pressure of £4,750 but could make LAL placements more affordable for schools at approximately £600 per place.
- Continue with 50% charging. This is likely to result in a further reduction in numbers in the LALs as some schools have said they honoured placements last year for children who had been referred prior to the decision to introduce charging, but will not be able to afford placements this year.
- Remove LAL charging but reduce the capacity of the LALs, eg. to 50% or 66% of current capacity. This would reduce the number of children who can access LAL, and / or the number of sessions / duration of LAL placements, but at least the available placements would be allocated on need rather than on the school's ability to pay. A reduction to 50% of current capacity would save **£24,300**. A reduction to 66% of current capacity would save **£4,934**.
- Combine a reduction in capacity with a 25% charge for places. A reduction to 50% capacity combined with a 25% charge could generate a saving of **£38,700**. A reduction to 66% capacity combined with a 25% charge for places could generate a saving of **£24,134**.

Implications / Risks:

- (1) If charging for LAL places continues, children at schools which cannot fund LAL places would be denied access to LAL provision, creating inequity across the Authority and a "postcode lottery" of provision. A number of schools have indicated that they would not be in a position to purchase LAL places for their pupils

- (2) There is a risk that children who cannot access LAL will not have their needs met if schools are not able to replicate the quality and intensity of provision which LALs offer. Few schools are likely to be able to offer equivalent provision in house. This could result in more children moving in to secondary schools with very low literacy levels.
- (3) There is a significant risk of increased EHC requests from parents and schools for children who are unable to access a LAL place. This is considered to be a high risk and would impact directly on the Mainstream School Top Up budget.
- (4) Risk of appeals to the SEND Tribunal for specialist school placements, with associated costs. This is considered to be a high risk and would impact directly on the budget for non maintained and independent special school places.
- (5) Feedback suggests that LALs are highly regarded by parents and schools. A reduction in LAL provision would create significant anxiety on the part of parents and negative publicity. The Parent SEN Survey carried out in 2017 showed that support for children with dyslexia is a particular concern for parents who responded.
- (7) If charging for LAL places continues and insufficient schools purchase LAL places in 2019-20, the savings target will not be achieved.

7. Option 2 – Specialist Inclusion Support Service

This service supports children with learning difficulties and associated needs in mainstream schools. The budget for this service was reduced from £70,000 to £50,000 in 2017-18. Like other SEN support services, this service receives consistently positive ratings in evaluations. See Appendix C

Consideration could be given to removing or reducing this service further.

Removal of the service would generate a saving of **£50,000**.

Reducing the service by half would generate a saving of **£25,000**.

Implications / Risks:

- (1) Possibility of schools / parents seeking more special school placements, with associated costs.
- (2) Children / staff in mainstream schools unable to access suitable support.
- (3) Additional pressure on other SEN services such as CALT and the ASD Service.

8. Option 3 – PRU Outreach

From Sept 2017 an outreach facility is part of the iCollege.

A cut of £80k was made to this separate budget in 2015/16, with a further cut of £40,000 in 2017/18 and £15,800 in 2018-19. The budget is now £61,200. Consideration could be given to removing or reducing this service further.

Removal of the service would generate a saving of **£61,200**.

Reducing the service by half would generate a saving of **£30,600**.

Implications/Risks

- (1) Increase in the number of permanent exclusions
- (2) Less support to schools in reintegrating young people who have been permanently excluded from another school
- (3) Greater demand for iCollege places
- (4) Possibility of charging for this provision

9. Option 4 – iCollege

The financial modelling of this service will require further review so that proposals can be put forward that result in expenditure balancing against income. A report on proposed changes will be brought to the next cycle of meetings. One saving proposal that could be made is in relation to the iCollege sixth form provision. This service is not a statutory requirement so could therefore cutting the eleven 6th form places at iCollege would generate a saving.

Implications/Risks

- (1) Increase in the number of NEET students.
- (2) A number of the 6th form students at iCollege are SEND so cutting the service might mean that these students are less likely to have their needs met.
- (3) Greater demand for costly out of county provision which would place increased pressure on the High Needs Block.

10. Option 5 – Home Tuition

There are plans to bring this service in-house from September 2019. Doing so would enable the service to be run with less overheads. iCollege charge £60,000 for managing the service. It is estimated that the service could be run in house at a cost of £40,000 in the first year with further reductions in future years. Bringing the service in-house would provide a **£23,000** saving in 19/20 and a **£17,000** saving in 20/21.

11. Option 6 – CALT

CALT has been working to an income target since April 2015 which has achieved a saving in the HNB. Evaluations of the service are consistently very positive, but some schools report they cannot afford to buy the service or to buy as much support as they would like. See Appendix C for impact and evaluation data.

Staffing has been reduced to bring the expenditure in the trading budget in line with the likely income to be generated by the team.

It is unlikely to be realistic that an increased income target could be met. Savings could therefore only be made by reducing the size of the service. Reducing by 0.5 of a post would make a saving in the region of **£27,500**. Reducing by a full time post would make a saving in the region of **£55,000**.

Implications / Risks:

- (1) The core service provided free to all schools who do not buy in would be reduced or removed
- (2) Reduced support for children and impact on levels of SEN expertise and training of staff in schools. Reduced support for SENCOs.
- (3) Reduced capacity to address concerns about some mainstream schools' SEN provision raised by parents in the 2017 Parent SEN Survey and in the 2018 Local Area SEND Inspection.
- (4) Increase in EHC requests, with associated costs. This is considered to be a high risk as parental requests for EHCPs often arise from dissatisfaction with the school's provision.

12. Option 7 – Vulnerable Children Fund

The Vulnerable Children's Fund of £50k pa (reduced from original 120k fund) is a highly appreciated, relatively small fund, especially for small schools who have unexpected additional financial pressures due to in-year admissions of children with challenging behaviour. It is specifically devised to promote social inclusion, reduce exclusions and take the pressure off SEN budgets by providing temporary funding.

It is possible to remove completely or reduce the fund i.e. only being available for primary schools and / or funding given for shorter periods, or no funding extensions. The criteria have been strengthened, with funding allocated for shorter periods and fewer extensions.

Previously, Heads Funding Group has indicated its reluctance to further reductions of this fund, but a reduction of £10,000 could be considered.

Implications/ Risks:

If schools, particularly smaller primary schools, cannot access this support in the future it could lead to:

- (1) Increased movement between schools, with schools being asked to admit more pupils with behaviour difficulties
- (2) Higher exclusion figures
- (3) Pressure on the iCollege as more schools ask for primary placements at Inspiration
- (4) Greater pressure on the costs associated with EHC plans and expensive statutory provision

(5) Increased pressure on the capacity of specialist support services

13. Option 8 – Transfer of early years SEND costs to the Early Years Block

The Early Years Block funds one to one support for children who attend private and voluntary early years settings and who have SEND but do not have EHCPs. This budget used to be part of the HNB and was transferred to the Early Years Block. This funding is allocated through the Early Years Inclusion Team. Funding is also provided to maintained nurseries and primary schools for children under 5 who have SEND but do not have an EHCP. If these costs could be transferred to the Early Years Block there would be a saving to the High Needs Block.

Heads' Funding Group Recommendations

The Heads' Funding Group on 8th January 2019 recommended that the only savings which should be taken from the High Needs Block in 2019-20 were those which would not have a negative impact on children with SEND and on schools.

- Option 5: Bringing the Home Tuition Service in house – estimated saving **£23,000**
- Reducing the charge to schools for PRU places from 80% of the cost to 50% of the cost is likely to increase take up of PRU places and could therefore achieve a saving by reducing the HNB spend on PRU Top Ups. - It needs to be noted that this could only be achieved after the existing Excluded Pupils (costing the local authority 100% of cost) leave and are replaced with 50% charges. As to whether how soon we will see a change in the PRU places is an unknown risk that is difficult to predict. Thus, the success of the saving for 19/20 relies upon goal congruence being achieved specifically for the schools in particular as the change to 50% / 50% split is more beneficial to schools than the existing charge.

A brief analysis of the position on the High Needs Block, and the rationale for not making further savings, produced by a Headteacher representative on the Forum, is attached at Appendix D.

Impact Data

Cognition and Learning Team (CALT)

The Cognition and Learning Team sends out an evaluation survey to schools every other year. The last one was done in summer 2017 and the next one is due in summer 2019. Ratings from schools in the 2017 survey were as follows (x schools responded):

Overall rating of the service	93% scored good or excellent
Quality of reports	100% scored good or excellent
Identification of pupils' needs	100% scored good or excellent
Recommendations	92% scored good or excellent
In school training	100% scored good or excellent

The survey also asked whether the team had had an impact on staff and pupils. The responses were as follows:

	Yes	No	N/A
Improved staff confidence	12 86%	0	2
Improved staff knowledge and skills	11 79%	0	3
Improved attitudes towards pupils with SEN	5 36%	1	8
Improved inclusion of pupils with SEN	11 79%	1	2
Promoting pupil progress	12 86%	0	2
Supporting pupil self esteem	9 64%	3	2

It is notable that a high percentage of respondents felt there had been an impact on staff and pupils, including pupil progress. Where respondents did not answer yes it was generally because they felt the question was not applicable in relation to the type of support they had received, rather than that there had not been a positive impact. A summary of comments from survey respondents is attached at Appendix C(i)

The CALT Team has also supported the delivery of specific intervention programmes in schools, including SNAP on 2 Maths, STAR/Catch Up and FFT Wave 3 / Sprint. Pupils were assessed before and after starting the programme. Progress was as follows:

SNAP on 2 Maths	2.5 months progress for every month on programme
STAR/Catch Up	3.5 months progress for every month on programme
FFT Wave 3 / Sprint	
Word Accuracy	3.2 months progress for every month on programme
Comprehension	2 months progress for every month on programme
Spelling	1.8 months progress for every month on programme

Training delivered by the team is consistently rated as 4 (good) or 5 (excellent), with the majority of attendees giving scores of 5.

Specialist Inclusion Support Service (SISS)

The SISS Service sends out an evaluation survey to schools every other year. The last one was done in summer 2017 and the next one is due in summer 2019.

Ratings from schools in the 2017 survey were as follows (15 schools responded):

Overall rating of the service	84% scored good or excellent
Quality of reports	84% scored good or excellent
Recommendations	100% scored good or excellent
In school training	100% scored good or excellent

The survey also asked whether the team had had an impact on pupils, staff and parents. Respondents were asked to rate the level of impact on a scale of 0 (no impact) to 5 (high impact). The responses were as follows:

	0	1	2	3	4	5	% score 3 or above
Pupils	8%	0%	0%	23%	62%	8%	93%
Staff	8%	0%	0%	8%	54%	31%	93%
Parents	8%	8%	0%	31%	38%	8%	77%

When considering impact, respondents were asked to consider:

Pupils: Progress, self- esteem, inclusion

Staff: Confidence, knowledge & skills, attitudes

Parents: Partnership with parents

93% of respondents felt that there had been a positive impact on pupils and on staff. A summary of comments from survey respondents is attached at Appendix C(ii).

ASD Advisory Service

The ASD Advisory Service sends out an evaluation survey to schools every other year.

The last one was done in summer 2018 and the next one is due in summer 2020.

Ratings from schools in the 2018 survey were as follows (21 schools responded):

Overall rating of the service	76% scored good or excellent
Quality of reports	67% scored good or excellent
Recommendations	81% scored good or excellent
In school training	90% scored good or excellent

The survey also asked whether the team had had an impact on pupils and staff.

When considering impact, respondents were asked to consider:

Pupils: Progress, self- esteem

Staff: Confidence and resilience

This question was not scored; comments are included in Appendix C(iii).

Respondents were also asked:

Does the ASD Advisory Service meet your needs as a school?

12 of 21 respondents said yes. Where schools felt the service was not meeting their needs, this appears to relate mainly to the limited capacity of the service (1.95FTE teachers to a caseload of approximately 700 children in mainstream schools), for example, some schools wanted more frequent visits.

Are there any other needs you have that are not being met?

8 out of 21 respondents said no. Respondents who said yes wanted a level of service which would be difficult to provide from existing resources.

A summary of comments from survey respondents is attached at Appendix C(iii).

Language and Literacy Centres (LALs)

The Language and Literacy Centres collect data annually on the average progress, in months, of children who have attended the centre, at the end of a 7 month intervention. The table below shows the data for the last 3 years.

	Single Word Reading	Sentence Reading	Spelling
2018	13.5m	18m	18.5m
2017	12m	14m	18.5m
2016	14m	17m	21.5m

Early Development and Inclusion Team (EDIT)

An evaluation survey on the EDIT Team is due in summer 2019.

In 2017, parents were surveyed on the effectiveness of the Lollipops groups. These groups were set up when the team was reduced in size by 50% and it became necessary to offer more group support and reduce the number of home visits.

8 parents responded.

Parents were asked to rate the following 7 positive statements on a scale of 1 (strongly disagree) to 4 (strongly agree).

	1 Strongly disagree	2 Disagree	3 Agree	4 Strongly agree	Number who agree
My child and I get a warm welcome	0	0	0	8	8/8
My child has been learning to do things he hasn't been able to do before	0	1	1	6	7/8
EDIT staff are friendly and approachable	0	0	0	8	8/8
EDIT staff are knowledgeable and have been able to help me when I've needed advice	0	0	0	8	8/8
There is a good range of activities for my child to try out and take part in	0	0	0	8	8/8
I feel more confident about helping	0	0	1	7	8/8

my child to play and learn					
I like having the opportunity to meet other parents and share experiences	0	1	1	6	7/8

The comments made by parents as part of the survey are included at Appendix C(iv).

PRU Outreach

Impact data is not currently available for PRU outreach service as the service has changed considerably this academic year. The iCollege Headteacher has reported that the service is well used by secondary schools and that the take up by primary schools has improved as a result of the changes. The service will look to gather impact data regarding the service at the end of the academic year.

Appendix C(i)

Cognition and Learning Team Service Evaluation for the Academic Year 2016-17 Summary of comments

1. Use of Service

- CALT carried out assessments for LAL. JW came in weekly and did some 1:1 teaching with one of our Year 4 pupils. She then provided a programme and resources for this to be followed up daily by a TA in school
- Start of year meeting only
- Only used LAL service
- Only used the LAL service
- SENCO change over so uncertain of any further information

2. Overall Rating of the Service

- The service is invaluable to our school and we have been using it for over 18 years
- This service is an essential resource for my SENCO Role
- The member of the CALT has made herself available in a relatively short time scale to provide assessments. When follow up observations have been required following recent training attended by the teaching assistants, effective feedback has been given by a member of CALT to support the school and the individual declaring the intervention.
- Our C< teacher is always ready to help in any way she can
- The service provided by CALT this year has been invaluable to our school. The knowledge and breadth of knowledge in this area has made providing support and provision for the pupils with C&L difficulties. Prompt feedback following an meeting with a Note of Visit which summarises your meetings/discussions with clear actions for both parties. They are friendly and approachable and nothing is too much trouble. They make you feel good about yourself and boost your confidence that you know what you are talking about!
- Continues to provide a great service, supporting us effectively as required. Great colleague to work with, especially for a SENCo in a small school.
- Really useful guidance and support. Has helped us to signpost next steps for children. Training for staff- both teachers and teaching assistants has also been beneficial.

3a. Quality of Reports

- Clear, easy to read
- Not used this year
- Good summary of what has been discussed in meetings with next steps. Make for an easy document to refer to when looking at next steps and actions.
- Reports are always very thorough, clear and provide a lot of practical advice to support the child in school.
- The reports are comprehensive and easy to navigate. The recommendations are practical and easy to implement with helpful strategies for both whole class and individual support. The reports are supportive to what is already happening and are tailored to each individual child.
- Always has sound advice which is possible to achieve within a Mainstream classroom.
- The quality of reports that have been provided have been clear and informative
- Excellent, detailed reports delivered quickly
- The reports are comprehensive and useful for staff and parents alike
- Only LAL reports received. These varied in length and quality depending on who wrote them.

3b. Identification of pupils' needs

- Sometimes we just need confirmation of the needs that we ourselves have already identified. However, it is good to have that professionally confirmed and sometimes other needs are successfully identified by CALT
- All children put forward for assessment have been expertly and effectively supported
- Reports have stated areas of difficulty and strengths
- The qualifications of the CALT teacher enables accurate identification of need. The advice provided for each child enables parents and professionals to be clear about a child's areas of difficulty.
- The reports clearly identify needs and explain them in depth
- Reports and discussions extremely helpful and I think that parents benefit from them too. Helpful in planning next steps in a child's provision

3c. Recommendations for provision

- Provision identified always clear, occasionally dependent on resource/funding which can prove difficult!
- Recommended provision needs to be discussed with SENCO before the report is written to ensure it is realistically able to be put in place
- Usually tailored to resources which we have in school which is useful. Other recommendations are sometimes made and if possible within our budget we will look into them.
- Reports always provide a variety of different strategies or recommended provision, aimed at both in class support and interventions.
- Despite our school not having trained staff in all the interventions the CALT teacher was able to tailor the recommendations to the school's capacity to deliver the intervention whilst still ensuring good progress for the child. They are supportive in training and working alongside a number of TA's who are working in the children's classes.
- Effective advice has been given including recommended interventions
- Recommended provisions are always appropriate and easy to deliver
- A lot of advice is given and it is true that not all of it can be used but we choose what can be reasonably applied to that pupil.
- In the current climate of budget cuts, we are not able to offer as much TA time or interventions as we do not have the funding. I think in the coming terms, provision will need to be more focussed on what children can do independently and/or with little adult support.

4a. Did the team respond to queries in a timely manner?

- Easy to contact. Prompt responses to any queries or referral
- All queries were responded to swiftly and fully
- SW always responds very quickly to emails and messages
- Yes, very efficient response and support
- They were extremely prompt and your queries (however big or small or already been told to you) are answered with professionalism and support. They are normally answered within 24 hours.

- Yes. Always contactable and flexible in appointment times etc
- The member of the CALT associated with the school responded quickly to emails/phone call and appointments were made in the diary at appropriate times.
- Yes
- All dealings with the team have been promptly and efficiently dealt with
- Definitely yes

4b. Were reports received within 2 weeks of assessment?

- Yes – often within a few days
- LAL – yes
- Write up of meeting same week
- These days definitely yes
- Yes
- Yes
- Throughout the year, 10 reports have been received. 3 were received within 2 weeks, 4 took 3 weeks and 3 took 4 weeks
- Yes
- Yes – a BIG well done to this as parents and teachers are always anxious following an assessment!
- Yes, vast majority were within a week/2 weeks
- Reports always received promptly
- Yes
- Yes

5. In school training

- Individualised programmes modelled for LSAs and follow up visits planned to observe delivery and amend where necessary.
- Training is taking place at the end of this term but has been discussed fully and planned well between SENCO and CALT
- SNAP maths training was great- not only introduced TAs to a new intervention (we'd only had one person previously trained and they had left) but also gave chance to give out a few key messages about working with children/ how they learn maths.
Teachers enjoyed session on dyslexia and strategies. Gave them things to think about for all children in class and how to address parental concerns.
- Training with a member of support staff for delivering a 1:1 bespoke intervention created by CALT
- Training for TAs in individual programmes for children
- None delivered by CALT this year
- Catch up FFT – refresher. Support for spelling

6. Impact

	Yes	No	N/A
Improved staff confidence	12	0	2
Improved staff knowledge and skills	11	0	3
Improved attitudes towards pupils with SEN	5	1	8
Improved inclusion of pupils with SEN	11	1	2
Promoting pupil progress	12	0	2
Supporting pupil self-esteem	9	3	2

Comments:

- The CALT teacher is really respected within our school. The relationships that they have built with the staff (teachers and TAs) mean that the provision being provided for the children has been invaluable. They have been supportive but challenging in their approaches.

- Both of our TAs have received training and refresher training this year and have benefited greatly from the input and observations
- Sometimes staff can feel overwhelmed by the amount of advice but once they realise that they can pick what is deemed appropriate for them it is better

7. Any other comments

- Due to our buying choices, school has had little input from CALT. The teaching input for one Year 4 child from JW was very much appreciated. He has made some progress but is beginning to refuse the extra intervention. We will continue to implement strategies and suggested provision and to build the picture for EHC application, which the EP has suggested would be appropriate
- Would love to access more of CALT service but no money
- Our setting is very small and SENCO time is limited to less than a day a term. Sue is fantastic support for me with help and advice readily given. Amazing!
- Hayley has always been supportive and so willing to work around the school timetable. I wish I could afford more
- The CALT teacher has been a life line for me this year supporting the many children with cognition and learning needs. They have helped me to change the view of SEND within the school and have motivated and kept us going with reflective, challenging and supportive meetings about the provision. The CALT teacher has helped me to reach teachers that are not always on board with the recommendations and been encouraging.
- Great VFM, knowledgeable, approachable team, thank you ☺

Appendix C(ii)

SISS Evaluation 2016-17
Comments

Have you made referrals to SISS for any children/young people?		
Yes	No	Don't know
14	0	0

Comments (Yes):

- 2015 &16
- 2016 & 17
- 2015-16
- Each year
- 3 Foundation Stage children
- 2016
- 2016
- 2017
- Every year
- Year 6 & 5
- 2015-16
- Every year
- Academic year 2016-17
- 2017
- 2014-15

Comments (No):

- N/A

Were the referrals accepted?		
Yes	No	Don't know
13	1	1

1. Use of service “Other” comments:

- Staff were able to look around Brookfields school and talk to staff. We were also given useful resources that might help the children and given practical solutions to problems. We were also given resources for staff to look at to help with planning and assessment.
- Didn't use the service at this school this year.
- Borrowing of equipment
We have used all of the above plus advice sheets/book recommendations and one member of staff has visited Brookfields to talk with the maths dept. Re. Individual maths curriculum being put into place.

2. Rating the service comments:

- Staff have always been responsive and have always sought further advice from colleagues if they could not help on the day.
- We have continued to find this service very useful in helping us to support 3 pupils within our school. K has again been very useful and knowledgeable, providing us with information, advice, support, resources and strategies that we have found much harder to locate/create ourselves. It does feel as though the service is being stretched unfortunately, as the staff appear to have less and less time for each child.
- S was very helpful when sharing ideas and resources for us to use and follow at school. S sought advice from her colleagues before providing us with information to ensure it was accurate and suitable for our purposes. Communication was very good.
- I have always found the SISS service to be excellent. Staff respond promptly to queries and have a wealth of knowledge and are very generous in sharing this both practically and through discussion.
- Gave realistic ideas to manage behaviour and how to improve her language skills e.g. 'now' and 'next' language.
- Any queries are dealt with fully and swiftly. Good contact is maintained throughout the school year. Excellent resources are shared.
- S came to meet the pupil first so he was more familiar with her. She was thorough in her work and adapted resources so he was able to show his skills in the way he communicates.
- SISS has been extremely supportive in assessing one of our pupils and in providing advice and training for staff. I always get a fast response when I contact them. The pupil's mum has valued their input and their honest assessment of what sort of school would be suitable for her son for his secondary education.
- K is very supportive for both staff and pupils when she comes in.
- I was very disappointed that the most recent referral did not include any support as a follow up, not even any recommendations on how to support the child. Previously we have received assessment, recommendations and additional visits, I understand that it was only the assessment referral that was accepted and I was not aware that the same level of support would be forthcoming.
- We referred a child in the summer term of 2016, several meetings were planned in the summer term, including our teacher going to x School to meet with SISS but this never happened. At the beginning of the autumn term, somebody from SISS met with the class teacher and discussed brief action plan and I was to get back in touch with SISS when actions had taken place and attendance of pupil had improved. Following the advice from the EP, we sought support from the ASD team rather than SISS, not both. After a lot of emails, advice led us to seeking support from SISS again and an assessment was done after a few months. We are nearly a year since the first referral was made and only one small assessment has been done on the child, with no further communication from SISS, despite R telling us that they would be in touch again this summer term.

3a. Reports, advice and recommendations comments (Quality):

- Reports are thorough and clear, very useful for staff.
- All of S's recommendations could be used or adapted for our purposes.
- Reports are received promptly and are clear.
- Unable to comment – no report received as yet.
- Advice always appropriate.
- A report was received which gave us accurate information and was ready for the pupil's annual review.
- I have not received any reports following visits this year.
- A report was received which gave us accurate information and was ready for the pupil's annual review.
- Very limited report stating an assessment on the P scales, covering approximately 12 points.
- The advice given has been very useful. The reports have limited use and don't reflect the advice and support we have received.

3b. Reports, advice and recommendations comments (Recommendations):

- 4- recommendations for one child, 1- recommendation or lack of for another child
- Recommendations that we have been suggested and given have been useful.
- A report was received which gave us accurate information and was ready for the pupil's annual review.
- Verbal recommendations helpful at meeting.
- Recommendations have been very useful. It was great being able to visit the school and see the advice in action.
- Recommendations are clear, manageable and practical.
- All of S's recommendations could be used or adapted for our purposes.
- Again, very thorough and clear, with some resources provided to support their implementation

4(a) Did the service respond in a timely manner?

- YES
- Yes, very efficient
- Yes
- Yes
- We sent the referral in January and received the outcome for our referrals in March. The initial visit was then at the end of March. It basically took 3 months from our referral to receive help. This was too long – basically a whole term!
- Yes
- Yes
- Yes
- Appropriate
- Yes it was very quick and worked around the time frame we had for annual review contributions.
- Yes
- It all happened within this timescale
- Yes
- Yes
- Still waiting to hear the outcome
- Results of referral within a short time. The initial visit was made within approximately 6 term time weeks

4 (b) Was written advice received within 2 weeks?

- Yes
- Haven't got that far yet
- Yes
- Yes

- Yes
- No – we have not received any written reports
- Yes – report emailed within 2 weeks
- Yes
- Yes
- Don't know
- Yes
- Yes
- Just over but S contacted me to tell me she was seeking more advice for the report hence the minor delay.
- Mostly, Follow up emails/advice were always quickly sent out but reports occasionally took longer
- All but one occasion when I knew it would take a few more days

5. Training comments:

- We have not had staff training as such but information received has always been very useful (4) and the visit to Brookfields particularly so. (4)
- The type of language to be used with the pupil.
- Specifically in relation to Down Syndrome.

6. Impact comments:

- Staff have been able to explore some different behavioural strategies and talk through difficult behaviours – in some cases this was reassuring for the school to know we are “on the right track!” In one case in particular it has enabled access to a maths curriculum that the pupil can engage with and a little progress has been seen, which is “good” as the syndrome she has makes long term progress challenging. Staff are more confident in following what is right for the child and the child is having more success.
- The involvement of SISS has very much helped out staff with supporting children with levels of SEN that need a higher and more differentiated level of support. The support from SISS has helped with the inclusion of these pupils within their classes and has improved staff knowledge and confidence when working with these children.
- Staff are able to implement strategies which promote inclusion and progression in learning through curriculum differentiation and assessment advice.
- Staff are more knowledgeable in how they can work with children and this has impacted on their skills and initiative. This has also helped other children in the class.
- Gave staff ideas to be able to improve the pupil's outcomes.
- Promotes pupil progress, improves partnership with parents.
- Unable to comment as involvement very recent!
- Information, resources and support have been useful especially in dealing with parents.
- The assessment helped us to moderate our own judgements, and will help the school to plan for next learning steps.
- Improved staff confidence – K has given good advice to staff about how they can support the children. Improved staff knowledge and skills – as above. Attitudes towards pupils with SEN – n/a. Improved inclusion of pupils with SEN – n/a. Promoting pupil progress – through assessment it has been clear the progress children have made and what they need to work on further. However we usually receive a booklet and a report outlining what children need to be working on and this year we have not. Supporting pupil self esteem – K was very supportive when one of our pupils was attempting transition and although it was not successful she visited the child in class and reassured him. Improved partnership with parents – n/a.
- Involvement focused the teacher's attention more on the needs of this particular pupil. It took a long time for his EHC plan to come through and for the SLT to recruit a TA to work with the child so the teacher had a tough job juggling the needs of this child with the needs of the rest of the class. There has been greater impact from the advice and support from SISS since there has been an additional adult in class to help implement it. Mum has been

very receptive to reports and advice given. She valued the very honest appraisal of her son’s ability level and advice on suitable secondary placement. She specifically requested that SISS should be represented at her son’s annual review because she values their input.

- Change of staffing ahs impacted on quality of advice but maybe this is to be expected with a time to gain experience.
- Excellent support on puberty education for an SEN child.
- No involvement yet.
- None as yet.

Further comments:

- K has visited the 2 children we receive the Outreach for twice this year and has carried out PACE assessments in March – however we have not received any reports from these visits for staff to follow up and work from. I know that everyone is extremely busy and we really value the support that K has given to the staff and the children when she has been in to school – but we really need a written report to follow up on. On another note I visited Brookfields with another one of our parents earlier this year and we were able to share how supportive we had found the outreach service and how the parents had felt supported too – Thank you.
- Thank you – it was really helpful and very well organised ☺
- New SENCO has been in place since the beginning of the summer term.
- I really value the support and advice that SISS are able to offer regarding specific children. They are frequently able to give immediate ideas and strategies when they visit school but when this is not possible they respond quickly by email or phone once they have found out further information.
- S was very helpful. She came in to see me to go through the report and the recommendations. She also acknowledged that had our pupil received 1:1 support she would have been able to offer more suggestions.
- Thank you!

Appendix C(iii)

**ASD Advisory Service Evaluation
for the Academic Year 2017-18**

Number of responses: 21

Please tick to indicate type of school:

Primary 18 Secondary 2

1. Use of service

Which of the following tasks have been undertaken in your school by the Advisory Service in the past academic year?

Observations of pupil	20
Training for TAs	7
Training for teachers	8
Support for SENCOs	8
Meetings with Staff	12
Meetings with Staff/Parents	15

Other 3

Please specify:

- Phone calls with parents
- Meeting with Year 5 child, rather than observation for a Year 5 discussion.

2. Rating the service – *please rate and comment*

On a scale of 1 – 4 how would you rate the service overall?

1 poor	1
2 satisfactory	4
3 good	8
4 excellent	8

- Conversations with ASD service and CT are useful to discuss child/difficulties/tasks to develop child.
- Efficient responses to questions and queries. Good training and support for all staff.
- The conversations with parents were useful to give an insight into individuals within a school setting. Discussion of possible strategies was beneficial and written reports were mostly useful.
- When support is available it is good, it is a shame that it is limited due to high demand.
- We had a very difficult child. There were no quick fixes but support was on hand & frequent (which is what we needed).
- Service is good. A fantastic service that provides valuable support to schools, families and most importantly the pupils. Just wish that there was more than 1 person covering all Primary Schools.
- I would rate the service as a 4 as our ASD support this year has been amazing. We have really appreciated the consistent support and guidance.
- Sensible and “do-able” advice.
- For such a stretched service, the team do an excellent job. They offer so much between them and I know they are there if I need them at any time.
- Highly valued service for staff, parents and pupils.
- Support for both staff and parents useful and relevant. However, sometimes expectations of support to be provided within the classroom can be challenging especially in a large class with high SEN needs. It would be useful to have support categorised into order of importance.
- Visits are usually timely, reports are completed in good time and delivered efficiently.
- Our reason for giving a 2 is due to the repetitiveness of the advice given after a quick conversation with staff members. On occasion, observations of no more than 10 minutes occur which doesn't always give a true reflection of the challenges or difficulties a pupil is having. Conversations with staff are not enough to give the staff an insight as to the reasons behind the behaviour they are struggling to manage.
- Support is provided quickly and feedback given promptly compared to most other services. Meeting every newly diagnosed pupil meet the adviser is often unhelpful and in fact can be detrimental.
- Some of the observations of pupils have been very short due to the support teacher arriving late to the school.

3. Reports, advice and recommendations – *please rate and comment*

Please rate on a scale of 1 – 4

(1 poor, 2 satisfactory, 3 good, 4 excellent)

a) Reports

1 poor	0
2 satisfactory	7
3 good	7
4 excellent	7

- Picture of child accurate, written observation of what child doing accurate.
- Very quick turnaround of reports after observation!
- Some felt brief/not personal to individual pupils.
- These are usually sent promptly and are sensitivity written.
- Always received promptly.
- I would rate this as a 3 as the advice and recommendations have been invaluable to both staff and parents this year. It has helped us to move particular things forward more quickly and with more success. Reports have been received quickly and with detailed recommendations that can be clearly understood by all adults.
- Swift return so recommendations are in place that term.
- Detailed.
- Promptly received and clear to read.
- Always clear and thorough.
- Reports arrive quickly.
- Little information given that isn't known but reports are written quickly.

b) Advice/Recommendations

1 poor	0
2 satisfactory	3
3 good	6
4 excellent	7

- Good advice – accurate to the children including asking.
- Useful and relevant. Parents may benefit from meeting to discuss the report with the person writing it.
- A range of recommendations made.
- It is always clear and possible to implement.
- Very clear advice and recommendations which have usually been discussed with staff.
- Recommendations discussed so we can use them – i.e. not something on a report that we cannot manage.
- Easy to follow.
- There were no recommendations beyond what was being done already.
- Occasionally some advice seems a bit generic.
- Advice is repetitive for multiple children and previous reports, often advice given are strategies the teachers are already implementing.
- Pupil comments are often reported as in fact; some strategies cannot be implemented in a mainstream school. Advice given without discussion with pastoral team so often support has been put in but the pupil does not report this to the service, reports then sound like school is not acting on information. Strategies suggested are usually commonly known and used in school, we would like new strategies. Advice given directly to parents about what school can offer – this can be misleading, things are offered that we cannot provide without prior discussion with the school.

4. Training – *please rate and comment*

Please indicate type(s) of training received by staff:

Specific pupil related	4
General ASD	6
Specific ASD related subject (eg Sensory, Behaviour, etc)	6
Other	1

Please rate on a scale of 1 – 4

1 poor	0
2 satisfactory	1
3 good	7
4 excellent	3

- Not in school this year.
- Staff require more training on helping general ASD and it needs to be delivered in a powerful way.
- Clear calm manner delivering sound & solid advice when needed the most.
- It was a great overview of ASD/ADHD behaviours. Maybe in the future more pupil specific whole school training would be great.
- Staff all really enjoyed the training session and was keen to implement the strategies recommended. I think all adults appreciated the ‘well-being’ aspect too!
- Not used this year.
- The academic access training was very helpful and relevant. Staff were given lots of practical ideas.
- TA training well received and up to date research interested staff who have been in the job a long time. The workshops are more discussion based rather than actively providing strategies.

5. Impact

Has the involvement of the **ASD Advisory Service** had an impact on pupils and staff?

Comment on:

- a) Building staff confidence
- b) Building staff resilience
- c) Promoting pupil progress
- d) Supporting pupil self esteem

- Yes to all, several children this year.
- Staff have been using breathing techniques shown themselves and with children (where appropriate).
- (a)
- Staff confidence & awareness of strategies to use has improved.
- Staff are more confident in understanding the needs of children with ASD.
- Staff have become more aware of how to meet the needs on a basic level, this now needs strengthening, along with their resilience. Pupils (with ASD) have made good progress.
- Staff confidence & resilience – a big impact. Able to calm staff and offer realistic advice when needed. Pupil progress & self-esteem – limited.
- It ticks a box.

- Supports onward referrals for the pupils. Provides staff with clear recommendations to support pupils' progress in areas of concern. Supports teachers/TAs ability to feel confident about supporting an ASD child which has an impact on their relationships with the ASD pupil.
- I think the ASD Service has helped us with all of the above and more this year.
- It is always good to talk through and adapt approaches if needed. It is good to know what you are doing is good practice. This builds staff confidence and resilience. This in turn supports the pupils. It is really important as a teacher/SENCo that at the point you are running out of ideas someone can offer something new to try – it can give the bit of hope to keep trying in hard circumstances.
- I feel the staff are more confident due to all the recommendations given, which in turn has built resilience although this has only been seen in staff who have fully taken A's advice on board. Pupil progress and increased self-esteem, is variable but this is inevitable for children with Autism.
- The training sessions for teaching staff on ASD and staff well-being was done as part of our INSET. It was helpful to staff in making them aware of their own needs. It was not intended to train staff for our ASD pupils beyond providing a general information session.
- Building staff confidence by confirming that strategies used in the classroom are good.
- The service has helped build rapport between families, students and staff and enabled us as a school to implement suitable support strategies and resolve problems before they become major ones.
- It always useful to have opportunities to discuss any concerns or achievements with those who are more skilled in this area. It is good to have reassurance that what we are doing is right or advise on what we could do to improve and make things easier for all involved.
- Support from the ASD Advisory Service makes us feel that we are able to get advice from someone quickly and easily who knows the school and the constraints we are under as well as knowing the child.
- No impact since as a result of advice and recommendations from the ASD team.
- Provides the pupils with an outlet and someone impartial to speak to. Useful for parents, however it can be unhelpful when parents contact directly without consultation with the school.
- Support reassures staff that they supporting pupils well. We do not learn anything new from the report that we have not already put into place.

6. Does the Advisory Service meet your needs as a school?

- Yes x 12
- Mostly. Staff need further training about teaching to ASD needs within a while class.
- No
- Yes – although I wish visits were more frequent and not reactive to some situations.
- Yes, I find A very accommodating.
- One of the challenges we are facing is that the parents have very high expectations of what the school can offer their children with ASD. In several cases this means that they expect all their desires to be met, these are not always in keeping with what the child wants or what is best for the child. The written reports do not always say what the school is doing towards these issues or support the school if parental requests are not the best option. We sometimes find that the Advisory Service suggestions conflict with those made by other organisations such as the Emotional Health Academy.
- Unfortunately not.
- It does offer support to some but would benefit from some more bespoke programmes.

7. Are there any other needs you have that are not being met?

- No x 8

- More contact/meetings with parents and staff, not just staff. Parents like to hear advice from an expert. ASD team can help support staff when parents don't always agree/accept point of view.
- Undiagnosed – little support.
- Staff training may be beneficial in the future.
- Parents have requested drop in sessions, in groups, with an ASD specialist.
- Yes
- Further discussion with pupils 1-1 would be of benefit to some pupils and hearing their thoughts.
- No, our needs are being met.
- Not that I can think of.
- Drop in sessions for parents to discuss on a regular basis. Drop in sessions for staff especially TA's who are working with the children on a daily basis. Longer observations of pupils to help support staff in identifying triggers and environmental changes they can make to support pupils.
- It would be more beneficial if the service could provide social skill groups. Meet with individuals, based on need, not just because they have a diagnosis. Work with individuals over a few sessions to support with a particular issue e.g. school reusing.

8. Please add any further comments you wish to make.

- Thank you for advice and support.
- A recent transition meeting was useful to try and ensure appropriate provision & support was in place.
- I am eternally grateful for A's continued support and professional approach and M's help this year to support parents.
- Reports are repetitive and offer few real options to use day to day.
- Parents appreciate a dedicated ASD advisory service. Parents always feel listened to and supported well by the teachers.
- Very valuable service – Thank you. With budgets as they are, it is good to be able to have a service to support a very vulnerable group of pupils that is "free" to access. I am sure this service supports children become more happy and secure and therefore successful learners. In an ideal world, an extension of the service might be to support schools who have children on the pathway as this is often the time support before diagnosis – this means potentially more "trial and error" which is stressful for staff and the child. If the team could come in they might be able to narrow down strategies/offer support that might support the individual child at an earlier point.
- Thank you for all your help and support this academic year.
- The staff who provide this service are all very friendly and approachable. They are brilliant with our young people and have helped to unpick some tricky situations. They are also hugely supportive of both staff and parents and working together as we do has really helped to settle some students and allow them to flourish.
- Thank you to A for all your help and support this year.

Appendix C(iv)

We want to make sure we're helping you and your little one in the best possible way.

*If you have been to more than one **LOLLIPOPS** session, please could you let us know if we're getting it right for you and your child?*

8 responses

Please circle a number to tell us how much you agree with the following, from 1 (disagree strongly) to 4 (agree strongly)				
My child and I get a warm welcome	1	2	3	4
				8
My child has been learning to do things he hasn't been able to do before (such as sitting for group-time, or taking turns, etc.).	1	2	3	4
		1	1	6
EDIT staff are friendly and approachable.	1	2	3	4
				8
EDIT staff are knowledgeable and have been able to help me when I've needed advice.	1	2	3	4
				8
There is a good range of activities for my child to try out and take part in.	1	2	3	4
				8
I feel more confident about helping my child to play and learn.	1	2	3	4
			1	7
I like having the opportunity to meet other parents and share experiences	1	2	3	4
		1	1	6

**After watching what goes on at LOLLIPOPS, what have you tried at home ?
Do you do anything differently to help your child learn ?**

Pro-prioception before play to help engage William. How to engage in books and play techniques.

We do more puzzles and encourage more language I believe.

I have learnt to make story time more interesting by using objects and toys that relate to the story being told.

Using Makaton more often, ready steady go games.

Climbing stairs, he loves the Sensory Room.

Signing Makaton. Ready, steady go.

Separate areas for toys. Encouraging things he wouldn't always play with.
Encouraging eye contact.

Is there anything in particular an EDIT has been able to give advice or help you with ? How has this made a difference for you and your child ?

(It could be advice on starting school, help with toilet-training, helping you make contact with another service such as Speech and Language or Dingley's Promise, etc.)

Advice on starting school, researching Brookfields School, setting up visit, extremely helpful with all areas engaged with all professionals.

We have had a lot of advice & guidance re: schools for which I am extremely grateful.

Help with nursery choices what does on and how to get things started. Help with speech and language.

A stay & play sessions more suited to J's needs (Lollipops).
Introduction to Dingley's Promise.

His Makaton has certainly improved, he seems to be more confident doing it in a group.

Communication skills. Help Nursery Schools.

Helping with starting pre-school and obtaining a grant to help my son settle.

Any other comments...

Without JG, CA and team we wouldn't have seen the progress in W we have seen and such a huge support for our family. They are very much needed in West Berkshire.

This is a wonderful service. H would really miss it if it wasn't there.

Lollipops is a great help to me. It is a place for me and my daughter to go to socialise and interact with others.

The ladies have all made us feel so welcome, both J & I are very relaxed at Lollipops. I have been given lots of helpful advice by everyone. I feel much more positive about our future.

L loves it here and is always sad to leave at the end of a session.

It is a wonderful friendly and helpful place. They have provided a plan of action so we know what's happening. J loves the staff and is very comfortable and happy with them.

All 4 of the EDIT team are wonderful with both me & my son. Very approachable & willing to help wherever they can.

A relaxed environment and I like learning from watching the professionals

Appendix C(v)



Response from Language & Literacy (LAL) Teachers to 2018 Funding Changes

The Teachers in Charge of the LALs would like to express their concerns about the impact of charging schools for places at the LAL; a move resulting from funding cuts to the High

Needs Block Budget 2018/2019. These funding cuts were finalised at the Schools Forum meeting of 12/03/18. Referring to the documentation from that occasion, the Cognition and Learning Team

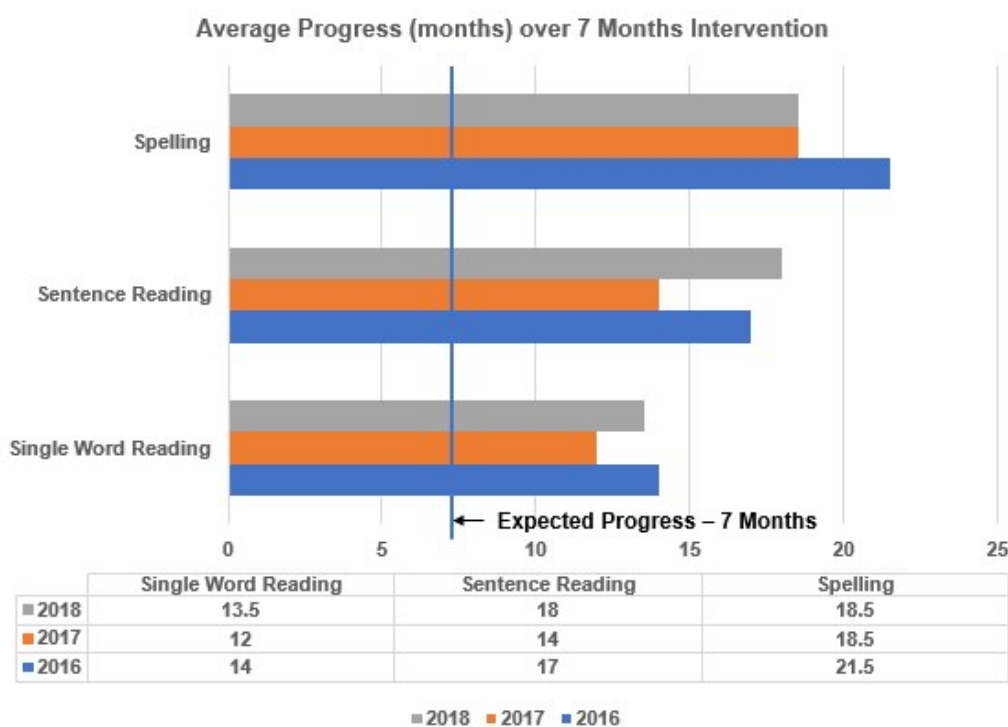
(CALT) had identified that the largest area of Special Educational Needs and Disability for West

Berkshire was Specific Learning Difficulty (SpLD) which made up 24.1% of all Special Educational Needs children identified. Of this 24.1%, up to 10% of children experience severe, significant and specific difficulties with literacy which are not resolving despite external professional advice and extra provision made by school. These children are supported by the external specialist provision provided by the LAL Resources; a service which offers both professional advice to schools and targeted teaching intervention. Historically, this service has been free at the point of delivery.

Research attests to the fact that SpLD is often co-morbid, sitting alongside other learning differences such as speech and language impairment, dyspraxia, attention deficit disorder and autistic spectrum profile. To meet this need, the training of the Teachers in Charge of the LALs necessitates Masters level training in SpLD, and experience as Special Needs Co-ordinator. The combination of width of experience and specificity of approach mean that the Teachers in Charge are uniquely able to address children for whom normal school interventions and programmes have failed to make an impact.

LAL Progress Data

The needs of these children have been well met over the years, as has been well evidenced by exit data for each child, from yearly parent questionnaires and from incidental comments from schools to the LALs (see appendix 1). In addition, West Berkshire is in the unusual position of having had a single tribunal for SpLD in a period 15 years as a result of providing specialist placements in the LALs.



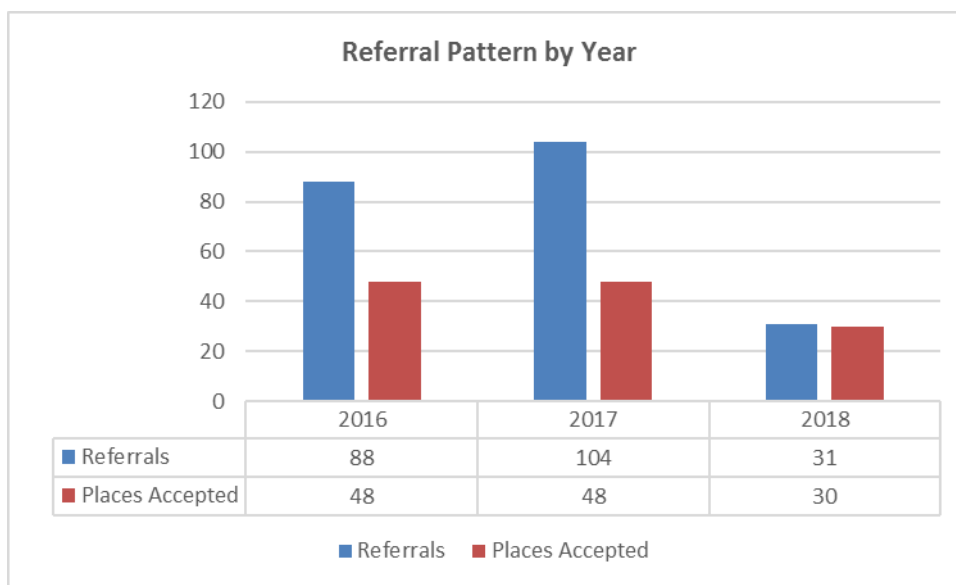
Source: Yearly LAL Data from Winchcombe and Theale Schools.

Current Financial Position:

This year, following the changes to funding arrangements (see Appendix 2), there were 30 successful applications for the LALs meaning that 14 places remained unfilled. Based on an expected £1,300 per child, this represented a **funding shortfall of £18,235** against expectation.

Change in Referral Pattern as a result of Funding Changes

The decision to make changes to the LAL funding arrangements had an immediate impact on the referral numbers that one would normally expect to see:



Source: LAL Admission Panel Records

This downward trend will worsen in future years because in 2018 a number of referrals were made and parents informed before the funding position was communicated to schools. This meant that schools were obliged to refer some children before they had ascertained the availability of funds.

Inappropriate Referral Pattern

In addition to the financial shortfall for LAL:

1. There remains a number of children needing support in the authority who have now had no specialist intervention during year 5.
2. Some of the children who were admitted to LAL were admitted on the basis of filling the resource and could have been said to displace those children who should have been referred who had more `specific' needs.

Impact on LAL Assessment Process

At the selection panel, the feedback from schools was that they had many for referral but could not afford to put them forward. There were unexpected outcomes:

1. There were not enough referrals to fully utilise the LAL resource.
2. The nature and number (35%) of EHC/PPG referrals was that their needs were far more complex than would normally be seen in what is a short focus placement.
3. The LALs needed the funding and so all referrals had to be taken irrespective of whether or not the provision was suitably matched to the need.
4. The complexity of some children's needs was such that different packages had to be created which, under normal circumstances, would have been considered financially untenable (1-1 teaching in an off-site placement.)

Impact on Secondary Provision

Children in the community who did not get the normal opportunity to attend LAL in 2018-19 will now be transferred to the Secondary Schools. The impact will be:

1. The Secondary Schools will face growing numbers of children functioning at the year 1 level of literacy.
2. Need will have been compounded year on year as lack of access to the curriculum increases due to literacy failure.
3. Needs may increase to the point where comprehensive assessment and wave 3 intervention will be required. Intervention may need to become long term and of a specialist nature.

Actual projected costs to Future Secondary Schools:

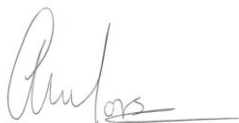
- Schools are expected to use the local funding formula to put in up to £6000 worth of provision per child before the Local Authority will consider additional funding. They will now be called on to do this to a greater extent than has been necessary before.
- Should Secondary Schools have to buy in Specialist Provision, the current hourly rate is £66 hr (source Helen Arkell Dyslexia Centre).
- Once those children who have missed out on LAL provision move into secondary school, the cost of additional provision combined with the LAL shortfall identified above will offset the projected cost saving within 3 years.
- In addition to cost, Secondary Schools will have the management and administrative burden of a replacement provision for that previously provided by the LAL's.
- Research has shown that lack of academic progress due to literacy failure also incurs greater costs in terms of social/emotional (SEMH) outcomes for the individual. These individuals usually incur more resource provision in terms of SEMH provision in the school setting. These costs in Secondary would be consequently impacted.

Conclusion

The need for the LAL provision has not gone away. The literacy needs of children are now not being met in Primary Schools because of the LAL funding decision. Furthermore, the provision is currently inequitable, as some schools are able to finance places and some are not. Without the reversal of this funding decision we expect a cycle of further

reduction in the uptake of LAL places as School budgets remain under pressure. This in turn will pass the problem onto Secondary Schools.

We believe it is in the interests of the children, the schools and the Authority to reverse the funding decision of 2018 and fully fund the LAL places for those in need. Any failure to do so will result long term greater cost implications for Secondary Schools and the Authority together with a compounded pattern of failure for an already vulnerable group of young people within our community.



Alison Morse
Winchcombe LAL Teacher-in-charge
14th September 2018



Dawn Dance
Theale LAL Teacher-in-Charge
14th September 2018

Appendix 1 – 2018 Comments from Schools, Parents and Children

School

- (1) Can I also say thanks for all the hard work and effort you have put into supporting our LAL children over the last couple of years. They have made so much progress both academically and personally. **I am so disappointed that we cannot afford to continue sending our children to LAL as it is such a super resource for children.**

Parents

- (1) Having benefitted from it so much we feel it would be wonderful if the programme to even more children in West Berkshire. A huge thank you to Mrs **! It has been a wonderful programme for **.
- (2) LAL is an excellent programme and just what my child needed so I would not change anything about LAL. I just think that it should be for the child in Year 5 and 6. Every school would benefit from Mrs** and her knowledge for the kids that don't learn the same as others. (its not one size fits all)...Lal has definitely worked for

....., the difference in his school work is amazing. ... he's grown in confidence and that his reading is getting really good!

- (3) He has thoroughly enjoyed attending LAL and knows he will miss his weekly LAL visits with you. He has gained so many skills, whilst I know he can struggle with taking direction, he has applied himself to learning. This is mainly down to your ability to make and provide an ideal environment and techniques that work. I am so pleased we embarked on this journey and we will continue your good work.
- (3)
- (4) Thank you for all your support and help you have given to ** and to both my husband and myself. I can finally sit and listen to ** read with confidence and hopefully this will be the start of a love of books.

Children

- (1) I've loved it! I think it's helped me because when we went to this place there was this sign and Dad would ask me to read it. I could never read it – now I can. 'Do not climb on this tree because it is ancient.'
- (2) We don't go too fast.. you stop and wait so I can get it.. at school people help me but it's busy so people can't always explain.'
- (3) I think it's helped because I remember when you first came in I wasn't that good at reading and spelling and now I'm more confident. I'm curious about what books I can read next.

KH Notes on High Needs Budget for Heads Funding Group

	2015/16	2018/19	2019/20		% Change 2015- 2018	% Change 2015- 2019	% Change 2018- 2019
Place Funding	6,285,400	5,841,830	6,062,000		-7.1%	-3.6%	3.8%
Top up funding	8,507,580	11,227,150	11,921,930		32.0%	40.1%	6.2%
PRU Funding	2,201,000	884,030	1,089,100		-59.8%	-50.5%	23.2%
Other Statutory	1,213,860	1,431,900	1,434,680		18.0%	18.2%	1.9%
Non Statutory	858,570	780,120	801,470		-9.1%	-6.7%	2.7%
Support service	515,750	127,290	127,290		-75.3%	-75.3%	0.0%
Total Expenditure	19,582,160	20,292,320	21,436,470		3.6%	9.5%	5.6%
HNB DSG Allocation	19,100,550	19,557,777	19,676,682		2.3%	3.0%	0.6%
Total DSG Funding	19,455,500	19,222,142	18,800,243		-1.2%	-3.4%	-2.2%
Shortfall	-126,660	-876,439	-2,636,227		592.0%	1981.3%	200.8%

The table above indicates the key issues with the high needs budget from 2015/16 to the proposed budget for 2019/20.

Issues that are evident are as follows:

- Allocation has increased by 2.3% from 2015/16 to 2018/19 whilst inflation over that period of time has increased by 8.8%. This means that for the allocation to be worth the same as in 2015/16 the allocated amount should have been £20,781,398
- Areas where savings have been identified have shown clear improvements in budgets. I.e. PRU, non-statutory and support services had a total budget of £3.6 million in 2015/16 compared with £1.8 million in 2017/18, a reduction of 50%.
- Top up funding has increased significantly from 2015/16 and is predicted to be 40.1% higher in 2019/20 than it was in 2015/16. The table below shows the breakdown of this budget and how it has changed. It is evident from the table that the biggest pressures on the budget over time have been independent school top ups, maintained special school top ups, further education top ups and academy resource unit top ups. These have increased from a total budget of £5.7 million in 2015/16 to £7.8 million in 2018/19, an increase of 37% :

	2015/16	2018/19	2019/20		% Change 2015- 2018	% Change 2015- 2019	% Change 2018- 2019
Maintained Special Schools	2,766,940	3,372,050	3,464,450		21.9%	25.2%	2.7%
Non West Berkshire Special Schools	1,085,240	959,970	968,130		-11.5%	-10.8%	0.9%
Non LEA Special Schools	855,320	804,040	981,570		-6.0%	14.8%	22.1%
Independent Special school place and top up	1,565,720	2,348,460	2,652,250		50.0%	69.4%	12.9%
Further education colleges	950,040	1,269,330	1,379,160		33.6%	45.2%	8.7%
Maintained school resource units	339,230	276,890	270,350		-18.4%	-20.3%	-2.4%
Academy resource unit	378,730	808,580	946,530		113.5%	149.9%	17.1%
Non WBC resource	44,240	147,260	160,190		232.9%	262.1%	8.8%
Maintained mainstream	469,980	648,221	666,360		37.9%	41.8%	2.8%
Academy mainstream	183,240	244,810	267,460		33.6%	46.0%	9.3%
Non WBC mainstream	66,650	80,330	66,480		20.5%	-0.3%	-17.2%
Disproportionate High Needs Pupils	70,000	73,470	100,000		5.0%	42.9%	36.1%

Conclusion

The cuts that have been implemented in the high needs budget have had the desired effect and budgets in these areas remain considerably lower than they did in 2015/16. There is a strong pressure on top up budgets, possibly caused by a need for more specialised provision than in 2015/16. It is possible that the cuts in non-statutory provision have led in some way to the increased need for top up funding. This is added to the fact that the high needs budget has not kept pace with inflation over the period.

My view is that to cut further would undermine the non-statutory services and lead to a higher level of need for EHCPs, Therefore, despite the predicted shortfall, I would recommend maintaining the current budget to offset further rises in top up budgets.

Dedicated Schools Grant (DSG) Budget Overview and Funding Settlement 2019/20

Report being considered by: Schools' Forum
On: 21st January 2019
Report Author: Amin Hussain
Item for: Discussion **By:** All Forum Members

1. Purpose of the Report

1.1 To set out the overall calculation of the Dedicated Schools Grant (DSG) and funding settlement for 2019/20

2. Recommendation

2.1 To note funding allocation for the 2019/20 budgets.

Will the recommendation require the matter to be referred to the Council or the Executive for final determination?	Yes: <input type="checkbox"/>	No: <input checked="" type="checkbox"/>
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3. Introduction

3.1 The DSG consists of 4 funding blocks:

- Schools
- Central Schools Services
- Early Years
- High Needs.

3.2 2019/20 is the second year of the new National Funding Formula which is a new formula used to calculate the funding allocation for the Schools Block, Central School Services Block, and High Needs Block. The new formula for calculating the Early Years was introduced from April 2017.

3.3 Funding can be transferred between blocks but there is a restriction of 0.5% for the transfer between the Schools Block and the High Needs Block. All transfers are subject to Schools Forum approvals.

3.4 This report sets out the 2019/20 DSG settlement for each block, as announced by the Government – though for Early Years and High Needs, these are provisional, and the budgets for these blocks will need to be set using estimates. The likely overall position of the 2019/20 budget for each block is also set out.

4. Overall Position

4.1 Table 1 summarises for 2019/20 the estimated DSG funding to be received for each funding block.

4.2

Table 1

Categories	(£'m)
Schools block	100.009
Central school services block allocation	0.976
High needs block allocation	18.509
Early years block	9.646
Total DSG allocation	129.140

5. Schools Block

5.1 The 2019/20 Schools Block allocation is shown in table below

Categories	(£'m)
Primary unit of funding (£3.89*13,293)	51.826
Secondary unit of funding (£4.94*9,352)	46.164
Funding through the premises and mobility factors	1.4642
Growth funding	0.5554
Total schools block	100.009

5.2 The final funding for 2019/20 has been determined by the October 2018 pupil numbers multiplied by West Berkshire's primary and secondary units of funding.

5.3 The sum for growth funding is calculated based on pupil data from the October 2018 census.

5.4 The total allocation excluding the growth fund is distributed to schools through the formula, by setting the formula funding rates and a minimum funding guarantee and funding cap on gains. The schools have been consulted on the formula and Schools Forum 09.12.2018 approved a 0% on MFG and 2 % Cap on gains.

5.5 The budget has no transfers from other Blocks, though the National Funding Formula does allow for 0.5% of the Schools Block funding, £490k, to be transferred into another Block (specifically High Needs Block). This was not approved by Schools Forum 09.12.2018.

5.6 After setting aside £555k for the growth fund, £99.445m is available to be allocated out to schools as per the formula principles agreed by Schools Forum in December (subject to final approval by the Council's Executive).

6. Central Schools Services Block

6.1 The 2019/20 Central Schools' Services (CSSB) block allocation is shown in table below;

Categories	
CSSB unit of funding (£s)	43.11
CSSB pupils (headcount for Primary and Secondary)	22,645
Total CSSB block (£'m)	0.9762

6.2 The Central Schools Services Block consists of the centrally retained services that were previously funded from the Schools Block, i.e. admissions, licences, servicing of Schools' Forum, Education Welfare, asset management, and statutory & regulatory duties.

6.3 For 2019/20, costs have been brought down by £135k mostly by staffing reductions, however the grant has reduced by £16k. This leaves a funding shortfall of £132k, and it is proposed to balance this by using underspends from 2018/19 and releasing unutilised ESG funding from Council reserves.

6.4 Further details and proposals on this block is discussed in separate report.

7. Early Years Block

7.1 The 2019/20 provisional Early Years block allocations is shown in table below:

Categories	(£'m)
Initial funding allocation for universal entitlement for 3 and 4 year olds	6.622
Initial funding allocation for additional 15 hours entitlement for eligible working parents of 3 and 4 year olds	2.051
Initial funding allocation for 2 year old entitlement	0.655
Initial funding allocation for Early Years Pupil Premium	0.035
Initial funding allocation for Disability Access Fund	0.024
Initial allocation for maintained nursery school supplementary funding	0.258
Provisional Total early years block	9.646

7.2 The funding is based on two consecutive years of January census data, and will be finalised three months after the close of the financial year to which it relates. 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.

7.3 The provisional DSG allocation received in December is based on the January 2018 census and therefore assumes no change to hours of early year's provision, other than the full year effect of the introduction of 30 hours provision for three and four year old children of working parents. West Berkshire will base the budget on the January 2019 census when the relevant data is received in late February.

- 7.4 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.
- 7.5 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.
- 7.6 All providers will need to be on a single rate in 2019/20.
- 7.7 In 2019/20, 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.
- 7.8 Proposals for this block will be brought to the next round of meetings when data from the January 2019 census is available to inform the current position and forecast.

8. High Needs Block

- 8.1 The basic structure of the High Needs formula is not changing in 2019/20. The 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 in 2019/20 the funding floor will increase so that all Local Authorities will attract at least a 1% gain per head of population against their 2017 – 2018 baselines.
- 8.2 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.
- 8.3 The 2019/20 provisional high needs block allocation is shown in table below:

Categories	(£'m)
Actual 2019-20 high needs NFF allocation	17.103
Basic entitlement factor, ACA-weighted (unit rate * Actual number of pupils)	1.818
Import / Export adjustments (based on January 2018 school census and February R06 2017/18 ILR.)	0.768
2019-20 Additional high needs funding	0.381
Deduction to High Needs Block for direct funding of places by ESFA	-1.561
Provisional Total high needs block	18.509

- 8.4 The pupil number element is based on the October 2018 census, whereas the import/export adjustment will use the January 2019 census and February 2019 ILR data – the final allocation being provided *after* the budget for 2019/20 is required to be set. An estimate will therefore need to be made.
- 8.5 The import/export 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.

- 8.6 High Needs Block deductions will be updated in March 2019, with the 2019 to 2020 academic year place numbers for the September 2019 to March 2020 period.
- 8.7 The High Needs Block was in deficit at the end of 2016/17. When the budget was set in 2017/18 budget it was agreed to repay the deficit over a three year period i.e. by the end of 2019/20. Since the High needs Block is showing a significant over spend this does not now seem possible.
- 8.8 The High Needs budget has no proposed transfers from other Blocks which would have gone some way to addressing the deficit position for 2019/20 however it would not address the underlying problem of funding within the High Needs Block.
- 8.9 Initial indications are that the demand in terms of numbers of high needs pupils and unit costs of provision is continuing to rise and savings will need to be found once again in order to prevent a growing deficit in this block.
- 8.10 Another report on this matter will set out in detail the possible options for making savings which is discussed in another report.

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Growth Fund 2018/19

Report being considered by: Schools' Forum
On: 21st January 2019
Report Author: Amin Hussain
Item for: Information **By:** All School representatives

1. Purpose of the Report

- 1.1 To inform School Forum Members of payments made to schools from the Growth Fund and Falling Rolls Fund budget in 2018/19.

2. Recommendation

- 2.1 To note the payments made and the amount of budget to be carried forward to 2019/20.

Will the recommendation require the matter to be referred to the Council or the Executive for final determination?	Yes: <input type="checkbox"/>	No: <input checked="" type="checkbox"/>
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3. Introduction

- 3.1 Under current school funding regulations, Local Authorities are allowed to top slice from the Dedicated Schools Grant (DSG) funding for a Growth Fund and Falling Rolls Fund with the approval of their Schools' Forum.
- 3.2 We have a commitment to pay for the opening to for the new school Highwood copse.
- 3.2 The Growth Fund is to support primary and secondary maintained schools and Academies *required* to provide extra places/classes in order to meet basic need within the authority, and funding schools where very limited pupil number growth requires an additional class *as set out by infant class size regulations*. It is not payable where schools have chosen to put on an additional class, but actual pupil numbers do not require them to do so. The Schools' Forum agreed the criteria for the 2018/19 Growth Fund at its meeting on 5th December 2016, and set aside a budget of £162,000.
- 3.3 There was a Falling Rolls Fund to support good and outstanding primary and secondary schools with temporary falling rolls due to a population dip and where numbers are expected to rise again in 2 to 3 years' time. The purpose was to provide funding to enable the school to continue with their existing number of classes (but where current pupil numbers dictate that the number should be reduced) if population

Growth Fund and Falling Rolls Fund 2018/19

data suggests that this number of classes will be required again in the near future, thus avoiding a redundancy in the short term. The Schools' Forum agreed the criteria for the 2018/19 Falling Rolls Fund at its meeting on 5th December 2016, and set aside a budget of £40,000. At the meeting of the Schools' Forum on 11th December 2017, it was agreed not to continue with this fund, so no applications have been invited this year which would have become payable in the next financial year.

- 3.4 Following the receipt of the final October 2018 Census data, all schools were invited to make a funding request if they felt that their circumstances met the growth fund criteria. A review of the relevant pupil number data by Finance also identified schools that may potentially qualify for funding. To support their applications, schools were asked to submit information regarding increases in class and teacher numbers between the two academic years. Only growth in relation to basic need requirements in the area (and thus increases in PAN or bulge years approved by the local authority for this purpose) qualifies for this funding.

4. Budget and Payments Made 2018/19

- 4.1 Two schools have made an application for growth funding: Theale Primary school and Bradfield Primary school. Only Theale primary school met the Growth Fund criteria and the relevant payment, £13,743, has been approved by the Head of Education (the detailed calculations are in Appendix A):
- 4.2 Bradfield Primary school application is being reviewed by requesting more information to assess whether the application meets the Growth Fund criteria.
- 4.4 It has been agreed by Schools' Forum that any unspent balance will be carried forward and added to next year's growth fund, to ensure that there is enough funding being built up for 2019/20 in order to pay formula funding for additional pupils in the new primary school, Highwood Copse, when it is planned to be opened in September 2019. As funding received through the Dedicated Schools Grant (DSG) is based on the previous year's pupil numbers, if additional funds are not set aside it will mean a reduction in funding available to allocate out to existing schools. The DSG allocation currently includes a growth fund allocation based on 2017/18 costs only and there is no other source of funding in the first year of a new school or as year groups are added.

5. Appendices

Appendix A – Growth Fund Calculations 2018/19

Growth Fund Calculations 2018/19

Theale									
Year Group:	Pupil Numbers			No. of Classes			No. of Teachers FTE		
	Oct-18	Oct-17	Change	Oct-18	Oct-17	Change	Oct-18	Oct-17	Change
Reception	42	44	-2	1.5	1.5	0.0	1.5	1.5	0.0
Year 1	45	44	1	1.5	1.5	0.0	1.5	1.5	0.0
Year 2	43	45	-2	1.5	1.5	0.0	1.5	1.5	0.0
SUB TOTAL Infant Classes	130	133	-3	4.5	4.5	0.0	4.5	4.5	0.0
Year 3	45	46	-1	1.5	1.5	0.0	1.5	1.5	0.0
Year 4	46	44	2	1.5	1.5	0.0	1.5	1.5	0.0
Year 5	40	46	-6	1.5	1.5	0.0	1.5	1.5	0.0
Year 6	45	29	16	2.0	1.0	1.0	2.0	1.0	1.0
TOTAL All Classes	306	298	8	11.0	10.0	1.0	11.0	10.0	1.0
Classes Required (assuming 30 pupils per class)									
Infants	5	5	0						
Total	11	10	1						
Funding Options:	No.	Rate	Funding	No. Mths	Payment	Max Payable per class:			
Infant Class Funding		£40,000	0	7	£0	£23,333			
or									
Additional class	8	£2,945	23,560	7	£13,743	£29,167			
or									
Increase in PAN		£1,473	0	7	£0	£14,583			
Reason for funding approved or for not meeting criteria:							Funding Approved:		
Growing school, increased pupil numbers							£13,743		
Head of Education agreed additional class									

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Dedicated Schools Grant Monitoring Report 2018/19 – Quarter Three

Report being considered by: Schools' Forum
On: 21st January 2019
Report Author: Amin Hussain
Item for: Information **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

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: <input type="checkbox"/>	No: <input checked="" type="checkbox"/>
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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 2018.
- 3.2 For 2018-19, there are four DSG funding blocks: Schools Block, High Needs Block, Early Years Block and a new Central Schools Services Block. The funding for each of the four blocks has been determined by a separate national funding formula.
- 3.3 The schools block is ring fenced in 2018-19 but the Local Authority can transfer up to 0.5% of the funding out of the schools block with Schools Forum agreement. The other blocks are not subject to this limitation on transfers.
- 3.4 The 2018-19 Dedicated Schools Grant allocation is £129m. This includes £35.5m which funds Academies and post 16 high needs places and is paid direct by the Education and Skills Funding Agency (ESFA). The remaining grant, after any actual brought forward over spend, is £92.8m; the revised DSG budget is built with a planned over spend of £464k.
- 3.5 Over spends, unless funded from outside the DSG, should be recovered by top slicing the following year's DSG allocation. Under spends must be used to support the schools' budget in future years. (by either creating a reserve or increasing the budget for one off expenditure).
- 3.6 The Local Authority and Schools' Forum are responsible for ensuring that the DSG is deployed correctly according to the Regulations. Monitoring of spend against the

grant needs to take place regularly to enable decision making on over spends/under spends and to inform future year budget requirements.

4. Quarter Three Forecast (31 December 2018)

4.1 The forecast position at the end of December is shown in Table 1. A more detailed position per cost centre is shown in Appendix A.

Table 1 - DSG Block Net Budgets	Current Budget	Support Services	DSG Grant Funding	Planned +over/- under spend	Forecast Overspend				Variance to Plan
					Month Three	Month Six	Month Seven	Month Nine	
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
Schools Block (inc ISB)	64,829	62	-64,985	-94	0	-94	-94	-94	0
Central Schools Services Block	847	205	-1,079	-26	0	-27	-26	-58	-32
Early Years Block	9,479	50	-9,492	37	0	37	37	46	9
High Needs Block	17,669	127	-17,249	547	0	881	979	605	58
Total Net Expenditure	92,824	444	-92,804	464	0	797	896	499	35

4.2 The budget was set with an over spend of £464k against the DSG, as per the decision made by the Schools' Forum. The forecast over spend position at Quarter Three against expenditure budgets is £499k

4.3 The forecast overspend includes the £87k under achievement on the High Needs funding due to a reduction in the import/export adjustment.

4.4 The Department of Education announced in December 2018 an additional £380k of high needs funding for 2018-19 and 2019-20 in recognition of the cost pressures that Local Authorities are experiencing on the high needs block. This has been included in the forecast figure.

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

5. Schools Block

5.1 Table 2 sets out the current forecast of the Schools Block. The original budget includes under spend carried forward from 2017-18. The budget change is due to additional de-delegated budget transfers.

Table 2 - Schools Block	Original Budget	Budget Changes	Current Budget	Current Forecast	Variance
	£'000	£'000	£'000	£'000	£'000
Expenditure	64,439	390	64,829	64,829	0
Support services	62		62	62	0
DSG grant funding	-64,985		-64,985	-64,985	0
Net Position	-484	390	-94	-94	0

5.2 At this stage in the year, no variance is forecast against budget. 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). Note that the de-delegated budgets within the Schools Block will be forecast as on line during the year because any over or under spending can only be used within these budgets and cannot be allocated generally across the DSG.

6. Early Years Block

6.1 Table 3 sets out the current forecast of the Early Years Block. The budget was set with an over spend due to the change in the carried forward amount from 2017/18.

Table 3 - Early Years Block	Original Budget	Budget Changes	Current Budget	Current Forecast	Variance
	£'000	£'000	£'000	£'000	£'000
Expenditure	9,479	0	9,479	9,488	9
Support services	50		50	50	0
DSG grant funding	-9,492		-9,492	-9,492	0
Net Position	37	0	37	46	9

6.2 The Early Years Block is difficult to predict due to the volatile nature of both the funding (the final grant allocation will be determined by the January 2019 census), and payments to providers (payments are made according to actual number of hours of provision each term). The final grant for 2017/18 has been notified, and a claw back of £355k has been taken against a provision of £360k.

6.3 As at Quarter Three there is a £9k forecast adverse variance which is due to increased demand to fund one to one support for children who attend private and voluntary early year's settings and do not have EHCPs.

7. Central Schools Services Block

7.1 The budget for this new Block was built after transferring funding from the Early Years Block and High Needs Block towards paying for the central services that are carried out on behalf of settings within these blocks. There was a £26k brought forward under spend from 2017-18 which has been adjusted within this budget.

Table 4 - Central Schools Services Block	Original Budget	Budget Changes	Current Budget	Current Forecast	Variance
	£'000	£'000	£'000	£'000	£'000
Expenditure	847	0	847	815	-32
Support services	205		205	205	0
DSG grant funding	-1,079		-1,079	-1,079	0
Net Position	-26	0	-26	-58	-32

7.2 As at Quarter Three there is a £32k forecast underspend due to a lower than budgeted charge for Copyright Licenses and a reduction in administration costs for the Capita IT system.

8. High Needs Block

8.1 Table 5 sets out the current forecast of the High Needs Block. The budget was set after carry forwards with a £447k over spend. The budget was increased by £100k, after Schools Forum agreed to utilise £100k of the 2017-18 improved position for invest to save proposals. If this sum is not utilised it would improve the budget position. The revised budget is set at an over spend of £547k.

Table 5 - High Needs Block	Original Budget	Budget Changes	Current Budget	Current Forecast	Variance
	£'000	£'000	£'000	£'000	£'000
Expenditure	17,569	100	17,669	17,991	323
Support services	127		127	127	0
DSG grant funding	-17,249		-17,249	-17,514	-265
Net Position	447	100	547	605	58

8.2 There is currently a forecast overspend of £323k against expenditure and an £87k under achievement on the grant allocation which is due to the lower than predicted amount of the import export adjustment.

8.3 An additional £380k of high needs funding has been allocated for 2018-19 in recognition of the cost pressures in the high needs block. This has been included in the forecast figure.

8.4 The main variances against expenditure are as follows:

- £39k – overspend in Applied Behaviour Analysis which represents the number of learners requiring bespoke packages to meet their needs.
- £74k - over spend in Sensory Impairment due to increased costs within the Joint Arrangement with the Royal Borough of Windsor and Maidenhead and an income target of £27k which has been set but is not expected to be achieved.
- £21k - over spend in Therapy Services which is due to a saving in the contract cost which was expected to be 10% of the cost but was in fact only £10k.
- £36k - over spend in SEN Commissioned Provision largely as a result of a forecast under achievement in income of £31k due to a place being filled by a WBC pupil. Savings will be realised elsewhere as a result of placing pupils in our own provision. There is also a forecast over spend on the repairs and maintenance budget.
- £127k – under spend in Further Education College Top Ups – as a result of building the budget on the same basis as last year which was found to be incorrect and did have a large under spend at the end of 2017/18.
- £215k – over spend in the PRU top up budgets – this is as a result of more than expected pupils receiving funding as permanently excluded pupils than budgeted.

- £125k – over spend in the EHCP PRU Placement budget – this is funding for pupils attending the PRU where they are on a single roll and the request is agreed by the SEN Assessment Team. Savings may be identified elsewhere as a result of using this provision.
- Other over and under spends within the Top Up funding areas are demand led and can be as a result of pupil movement from one setting to another.

9. Conclusion

- 9.1 Over spends in the High Needs Block is significant and the total over spend forecast against this Block is £605k (including budgeted over spend and additional grant allocation, £381k). There needs to be a serious consideration to where spending can be scaled back and savings identified in order to contain the over spend to the initial budget.
- 9.2 Though a transfer could be made from the Schools Block to support the High Needs Block, it would be a one year only transfer and would not address the structural deficit problem.

10. Appendices

Appendix A – DSG 2018-19 Budget Monitoring Report Month 9

Dedicated School's Grant (DSG) 2018-2019 Budget Monitoring Month 9

Cost Centre	Description	Original Budget 2018-19	Net Virements Agreed In Year	Amended Budget 2018-19	Forecast	Variance	Comments
90020	Primary Schools (excluding nursery funding)	48,786,120		48,786,120	48,786,120	0	
DSG top slice	Academy Schools Primary	0		0	0	0	
90025	Secondary Schools (excluding 6th form funding)	14,784,820		14,784,820	14,784,820	0	
DSG top slice	Academy Schools Secondary	0		0	0	0	
90230	DD - Schools in Financial Difficulty (primary schools)	120,020	259,100	379,120	379,120	0	
90113	DD - Trade Union Costs	43,680		43,680	43,680	0	
90255	DD - Support to Ethnic minority & bilingual Learners	151,750	38,300	190,050	190,050	0	
90349	DD - Behaviour Support Services	196,830	17,190	214,020	214,020	0	
90424	DD - CLEAPSS	3,170		3,170	3,170	0	
90470	DD - School Improvement	0		0	0	0	
90423	DD - Statutory & Regulatory Duties	147,590		147,590	147,590	0	
90235	School Contingency - Growth Fund/Falling Rolls Fund	205,000	75,710	280,710	280,710	0	
	Schools Block Total	64,438,980	390,300	64,829,280	64,829,280	0	
90583	National Copyright Licences	159,610		159,610	133,010	-26,600	
90019	Servicing of Schools Forum	43,580		43,580	43,580	0	
90743	School Admissions	244,860		244,860	244,860	0	
90354	ESG - Education Welfare	201,900		201,900	201,900	0	
90460	ESG - Statutory & Regulatory Duties	197,540		197,540	191,920	-5,620	
	Central School Services Block DSG	847,490	0	847,490	815,270	-32,220	

Cost Centre	Description	Original Budget 2018-19	Net Virements Agreed In Year	Amended Budget 2018-19	Forecast	Variance	Comments
90010	Early Years Funding - Nursery Schools	876,070		876,070	876,070	0	
90037	Early Years Funding - Maintained Schools	1,269,090		1,269,090	1,269,090	0	
90036	Early Years Funding - PVI Sector	6,199,460		6,199,460	6,199,460	0	
90052	Early Years PPG & Deprivation Funding	48,280		48,280	48,280	0	
90053	Disability Access Fund	23,370		23,370	23,370	0	
90018	2 year old funding	719,480		719,480	719,480	0	
90017	Central Expenditure on Children under 5	223,300		223,300	223,300	0	
90287	Pre School Teacher Counselling	45,000		45,000	45,000	0	
90238	Early Years Inclusion Fund	75,000		75,000	84,360	9,360	Increased demand
	Early Years Block Total	9,479,050	0	9,479,050	9,488,410	9,360	
90026	Academy Schools RU Top Ups	854,270		854,270	808,580	-45,690	Slight reduction in FTE compared to budget.
90539	Special Schools - Top Up Funding	3,300,420		3,300,420	3,372,050	71,630	Additional Place and Top Up funding in relation to increased numbers of pupils.
90548	Non WBC Special Schools - Top Up Funding	1,098,070		1,098,070	959,970	-138,100	Known movements to other settings including one placement costing in excess of £100k
90575	Non LEA Special School (OofA)	840,100		840,100	804,040	-36,060	Various movements of placements.
90579	Independent Special School Place & Top Up	2,436,400		2,436,400	2,348,460	-87,940	Various movements of placements.
90580	Further Education Colleges Top Up	1,396,140		1,396,140	1,269,330	-126,810	Costs factored into the budget no longer require payment including several changes to pupil placements.
90617	Resourced Units Top Up Funding Maintained	293,020		293,020	276,890	-16,130	Number of pupils lower than expected at one site
90618	Non WBC Resourced Units - Top Up Funding	107,000		107,000	147,260	40,260	Known costs for placements agreed to date
90621	Mainstream - Top Up Funding maintained	541,560		541,560	648,220	106,660	Increasing numbers of pupils entitled to Funding
90622	Mainstream - Top Up Funding Academies	185,170		185,170	244,810	59,640	Increasing numbers of pupils entitled to Funding

Dedicated Schools Grant Monitoring Report 2018/19 – Quarter Three

Cost Centre	Description	Original Budget 2018-19	Net Virements Agreed In Year	Amended Budget 2018-19	Forecast	Variance	Comments
90624	Non WBC Mainstream - Top Up Funding	75,000		75,000	80,330	5,330	Known costs for placements agreed to date
90625	Pupil Referral Units - Top Up Funding	542,950		542,950	757,700	214,750	Summer and Autumn Term Actuals. Estimated for Spring Term.
90627	Disproportionate No: of HN Pupils NEW	100,000		100,000	73,470	-26,530	Includes Spring 2019 Estimate
90628	EHCP PRU Placement			0	126,330	126,330	Based on number of pupils currently attending the PRU with EHCPs
				381,000		-381,000	
High Needs Block: Top Up Funding Total		11,770,100	0	12,151,100	11,917,440	-233,660	
90320	Pupil Referral Units	660,000		660,000	660,000	0	
90540	Special Schools	2,860,000		2,860,000	2,860,000	0	
90584	Resourced Units - Place Funding (70)	242,000		242,000	242,000	0	
High Needs Block: Place Funding Total		3,762,000	0	3,762,000	3,762,000	0	
90237	SEN High Needs Contingency		90,000	90,000	90,000	0	2017/18 C/F budget agreed by SF re Behaviour Support and PPEP Care Program
90240	Applied Behaviour Analysis	75,000		75,000	114,440	39,440	Based on current demand
90280	Specil Needs Spprt Team	319,170		319,170	315,670	-3,500	
90287	Pre School Teacher Counselling	40,000		40,000	40,000	0	
90288	Elective Home Education Monitoring	27,990		27,990	27,990	0	
90290	Sensory Impairment	172,750		172,750	246,330	73,580	Increase in JA costs and the number of additional visits needed . Assumes NO recharges w ill apply this FY.
90295	Therapy Services	240,760		240,760	261,470	20,710	Savings in contract costs low er than anticipated
90315	Home Tuition	245,000		245,000	245,000	0	
90555	LAL Funding	82,400		82,400	91,700	9,300	Few er than expected places requested therefore recharges low er.
90565	Equipment For SEN Pupils	0	10,000	10,000	10,000	0	2017/18 C/F budget agreed by SF.

Cost Centre	Description	Original Budget 2018-19	Net Virements Agreed In Year	Amended Budget 2018-19	Forecast	Variance	Comments
90577	SEN Commissioned Provision	456,000		456,000	491,670	35,670	Premises Expenses pressure. Places now filled by WB pupils so factored into underspends else here.
90582	PRU Outreach	61,200		61,200	61,200	0	
90585	HN Outreach Special Schools	50,000		50,000	50,000	0	
90610	Hospital Tuition	45,000		45,000	45,000	0	Estimate of funding required for Financial Year for known cases .
90830	ASD Teachers	141,550		141,550	141,550	0	
90961	Vulnerable Children	50,000		50,000	50,000	0	
90581	Dingleys Promise	30,000		30,000	30,000	0	
High Needs Block: Non Top Up or Place Funding		2,036,820	100,000	2,136,820	2,312,020	175,200	
High Needs Block Total		17,568,920	100,000	18,049,920	17,991,460	58,460	
Total Expenditure across funding blocks		92,334,440	490,300	93,205,740	93,124,420	35,600	
SUPPORT SERVICE RECHARGES		444,000		444,000	444,000	0	
TOTAL DSG EXPENDITURE		92,778,440	490,300	93,649,740	93,568,420	35,600	

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Schools Forum Work Programme 2018/19

Term 4	Work Programme 2019/20	20/02/19	27/02/19	05/03/19	11/03/19	Decision	Jessica Bailiss
	Final DSG Budget 2019/20 - Overview	20/02/19	27/02/19	05/03/19	11/03/19	Decision	Amin Hussain
	Final Central Schools Block Budget 2019/20	20/02/19	27/02/19	05/03/19	11/03/19	Decision	
	Final High Needs Block Budget 2019/20	20/02/19	27/02/19	05/03/19	11/03/19	Decision	Jane Seymour/Michelle Sancho
	Final Early Years Block Budget 2019/20	20/02/19	27/02/19	05/03/19	11/03/19	Decision	Avril Allenby
	Schools Funding Benchmarking Information	20/02/19	27/02/19	05/03/19	11/03/19	Information	Amin Hussain
	DSG Monitoring 2018/19 Month 10			05/03/19	11/03/19	Information	Ian Pearson
	Schools: deficit recovery (<i>standing item</i>)	20/02/19	27/02/19	05/03/19	11/03/19	Discussion	Melanie Ellis

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