



NOTICE OF MEETING

Schools Forum

Thursday 12 September 2013, 4.30 pm

Council Chamber, Fourth Floor, Easthampstead House, Bracknell

To: The Schools Forum

Schools Members:

Sue Barber, Primary School Governor
Liz Cole, Primary School Representative
Trisha Donkin, Primary School Representative
Ed Essery, Primary School Governor
Brian Fries, Secondary School Governor
Martin Gocke, Pupil Referral Unit Representative
Keith Grainger, Secondary Head Teachers Representative
John McNab, Secondary School Governor
Joanna Quinn, Primary School Representative
Tony Reading, Primary School Governor
Paul Salter, Secondary School Representative
Trudi Sammons, Primary School Representative
Anne Shillcock, Special Education Representative
David Stacey, Primary School Governor Representative
John Throssell, Primary School Governor (Vice-Chairman)
Kathy Winrow, Secondary School Representative

Non-Schools Members

George Clement, Union Representative (Chairman)
Robin Sharples, Oxford Diocese (Church of England)
Kate Sillett, PVI Provider Representative
Vacant, 14-19 Partnership Representative
Vacant, Diocese Representative (Roman Catholic)

ALISON SANDERS
Director of Corporate Services

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Published: 3 September 2013

Schools Forum
Thursday 12 September 2013, 4.30 pm
Council Chamber, Fourth Floor, Easthampstead House, Bracknell

AGENDA

Page No

1. **Election of Chairman**
2. **Appointment of Vice-Chairman**
3. **Apologies for Absence/Substitute Members**
To receive apologies for absence and to note the attendance of any substitute members.
4. **Declarations of Interest**
Any Member with a Disclosable Pecuniary Interest or an Affected Interest in a matter should withdraw from the meeting when the matter is under consideration and should notify the Democratic Services Officer in attendance that they are withdrawing as they have such an interest. If the Interest is not entered on the register of Members interests the Monitoring Officer must be notified of the interest within 28 days.
5. **Minutes and Matters Arising**
To approve as a correct record the minutes of the meeting of 20 June 2013. 1 - 6
6. **2014-15 Schools Budget - Preliminary Arrangements**
To present the Schools Forum with an update on the arrangements required for the 2014-15 Schools Budget and to seek agreement to distribute the briefing note and consultation document to all schools and interested parties. The briefing note and consultation document set out the mandatory changes that will apply to next year's budget and also seeks views from schools on whether central management should continue on the budgets subject to 'de-delegation' and whether any changes should be made to the arrangements where there is a choice. 7 - 78
7. **2012-13 School Balances**
To update the Schools Forum on the level of balances held by schools as at 31 March 2013, how these compare to the previous financial year and to consider whether any significant surplus balances should be subject to claw-back and re-invested within the overall Schools Budget 79 - 86

8. **Schools Budget 2013-14 Monitoring and Other Matters**

87 - 96

- 1 To endorse budget transfers proposed for 2013-14;
- 2 To receive an update on the 2013-14 forecast budget monitoring position for the Schools Budget;
- 3 To agree loan requests received from schools; and;
- 4 To agree changes to the criteria for in-year budget allocations to schools experiencing significant growth in pupil numbers.

9. **Dates of Future Meetings**

To note that the next two meetings of the Forum are scheduled to take place at 4.30pm on:

- 17 October 2013
- 28 November 2013

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**SCHOOLS FORUM
20 JUNE 2013
4.30 - 5.30 PM**

Present:

Schools Members

Ed Essery, Primary School Governor
Martin Gocke, Pupil Referral Unit Representative
Joanna Quinn, Primary School Representative
Tony Reading, Primary School Governor
Margaret Saner, Secondary School Governor
John Throssell, Primary School Governor (Vice-Chairman)

Non-Schools Members:

George Clement, Union Representative (Chairman)
Robin Sharples, Oxford Diocese

Apologies for absence were received from:

Sue Barber, Primary School Governor
Liz Cole, Primary School Representative
Trisha Donkin, Primary School Representative
Brian Fries, Secondary School Governor
Keith Grainger, Secondary Head Teachers Representative
Louise Lovegrove, Primary School Representative
John McNab, Secondary School Governor
Paul Salter, Secondary School Representative
Anne Shillcock, Special Education Representative

33. Declarations of Interest

Ed Essery declared an interest in respect of Item 7 in relation to Wildmoor Heath School as a governor at the school.

34. Minutes and Matters Arising

RESOLVED that the minutes of the meeting held on 14 March 2013 be approved and signed by the Chairman as a correct record subject to the following amendments:

- *Minute 28:* On 1 March 2013, the Department for Education (DfE) announced capital grant funding allocations. In respect of finance to create additional school places, there was £1.6 billion nationally over the next two years, of which the council had been allocated £5.9 million.
- *Minute 28:* This was approximately half the amount received in each of the last two years, which had been used for budget planning purposes.

35. Membership of the Schools Forum

The Forum received a report regarding a change to the membership of the Forum.

Nominations were recently sought to fill three vacancies for primary school governor representatives, three vacancies for secondary school governor representatives, and one vacancy for a special education representative on the Forum following the end of the terms of office for John Throssell, Edward Essery, Sue Barber, Brian Fries, John McNab, Margaret Saner and Anne Shillcock.

Seven application forms were received; from John Throssell, who was a governor at Crown Wood Primary School; Sue Barber, who was a governor at Winkfield St Mary's School; David Stacey, who was governor at Wooden Hill Primary School; Brian Fries, who was a governor at Easthampstead Park Secondary School; John McNab, who was a governor at Edgbarrow Secondary School; Ed Essery, who was a governor at Sandhurst School, and Anne Shillcock, who was a governor at Kennel Lane Special School.

In accordance with the Forum's Constitution and as the nominations were uncontested Mr Throssell, Mrs Barber, Mr Stacey, Mr Fries, Mr McNab, Mr Essery and Mrs Shillcock were duly appointed to fill the vacancies.

The Forum noted that Mr Throssell, Mrs Barber, Mr Stacey, Mr Fries, Mr McNab, Mr Essery and Mrs Shillcock would be appointed to the Forum for a period of three years until 31 August 2016.

The Forum were also updated on further changes to its membership:

- Louise Lovegrove, Cranbourne Primary School Governor had resigned as a member of the Forum.
- Robin Sharples, Diocesan Schools Link Adviser in Bracknell, would be the new Church of England Representative on the Forum from the Oxford Diocese.

36. **Capital Funding Bids**

The Schools Forum considered a report on the bids to Department for Education (DfE) for grant funding to support the Education Capital Programme.

DfE Basic Need Funding grant was used by the Council to create the additional school places required to keep pace with rising rolls. In the most recent funding announcement, the DfE had made a two year allocation of Basic Need Grant for 2013/14 and 2014/15; however, this was at a 40% reduction in annual funding when compared to the level of grant received in 2012/13.

The Education Capital Programme had to be reviewed in the light of the reduced funding and was no longer affordable as originally envisaged; with all newly proposed schemes now on hold.

At the same time as making announcements for Basic Need Funding, the DfE also set out two new grants that Local Authorities could bid for from a national pool of around £1bn. The new grants would be available to support the cost of additional places needed by young people. The Council had bid for £5.146m to undertake projects at Garth Hill, Owlsmoor Primary, a primary aged surge class for North Bracknell and a secondary SEN facility.

Outcomes from the bid process would be known in June or July 2013 at which time the Education Capital Programme would be determined.

The Schools Forum **NOTED**:

- The bids to DfE for grant funding to support the Education Capital Programme;
- The potential revenue pressure that may arise in the short to medium term in developing a new in-borough SEN facility.

37. **Department for Education School Funding Reform - Arrangements from 2014-15**

In 2012, the Department for Education (DfE) started a process to reform school funding so that it was “fairer, more consistent and transparent and so that funding intended for education reaches schools and the pupils that need it most”. From April 2013, following consultation with schools and agreement of the Forum, significant changes were introduced to the formula used to distribute funds to schools in Bracknell Forest (BF).

The DfE had now undertaken an evaluation of the impact arising from the changes and had outlined further amendments of which the most significant areas for BF included:

- Changing the criteria to be used to fund schools for low prior attainment;
- Needing to consider whether the right amount of funds was being allocated to schools based on deprivation measures;
- Whether the lump sum allocation paid to schools should be changed, including the possibility of setting differential rates for primary and secondary schools;
- Requiring a non-school representative on the Forum to represent 14-16 education providers;
- Needing to set the funding threshold at which schools could seek additional financial support for pupils with high support needs from £6,080 to £6,000;
- Helping schools funded on the place-plus methodology to adopt to the more flexible approach to setting funded places than is currently the case.

In terms of making changes to the Funding Formula for Schools, the Council did not consider this necessary as no significant issues had been raised by schools or the latest DfE guidance on school funding.

The Council would now consider options for change from 2014-15 and seek views from the Forum in September as to whether a consultation on the issues should be undertaken with all schools during October and November.

This process would allow the Council to confirm to the DfE by the 31 October 2013 deadline the intended Funding Formula to be in operation for the next financial year.

38. **Update to the Scheme for Financing Schools**

The Forum considered a report relating to making changes to the Bracknell Forest Scheme for Financing Schools. The report sought to obtain agreement from members of the Schools Forum to make one change to the provisions relating to loan arrangements for schools and to provide an update on mandatory changes that the Department for Education (DfE) required all local authorities (LAs) to implement.

Forum Members representing maintained schools **AGREED** that the Bracknell Forest Scheme for Financing Schools be updated to include:

- The additional condition on loans to schools (paragraphs 5.5 and 5.6);

- The changes required in the latest statutory guidance from the DfE (paragraph 5.9).

39. **Additional Financial Support to Schools**

The Forum considered a report which updated members on:

- Direct financial support provided to schools during 2012-13 under powers delegated to the Director of Children, Young People and Learning;
- Progress made by schools against current licensed deficit agreements;
- Requests from schools for new loan arrangements;
- The amount of Dedicated Schools Grant income expected to be received in 2013-14.

The Forum was also requested to approve the release of funding from the Schools Specific Contingency to Jennett's Park Primary school to finance the additional costs arising from moving from a one form of entry school to a two form of entry school from September 2013.

RESOLVED that the Schools Forum:

- NOTED** the £46,267 of direct financial support provided to schools during 2012-13 under powers delegated to the Director of Children, Young People and Learning (paragraphs 5.6 to 5.9);
- NOTED** that Cranbourne Primary School was on target to meet the terms of the previously agreed licensed deficit but with a risk that a small deficit may carry forward into 2014-15 (paragraph 5.15);
- AGREED** the request from Ascot Heath Infants school for a new loan advance would be presented to the Executive Member for formal agreement (paragraph 5.18);
- AGREED** the release of £110,000 from the School Specific Contingency to finance the additional costs arising at Jennett's Park Primary School from moving from a one form of entry school to a two form of entry school from September 2013 (paragraph 5.19).
- NOTED** at this stage the estimated amount of Dedicated Schools Grant for 2013-14 is £74.992m (after deduction to fund Ranelagh Academy), (paragraphs 5.23 and 5.24);
- NOTED** the £408,521 of post 16 SEN funding that would be received in respect of Kennel Lane Special School which was not taken into account in setting the 2013-14 budget (paragraph 5.25).

The request from Wildmoor Heath school for a new loan advance would be considered at the next meeting of the Forum, as due to a member interest the Forum was inquorate for this decision to be undertaken.

40. **2012-13 Provisional Outturn on the Schools Budget**

The Forum considered a report informing members on the provisional outturn on the 2012-13 Schools Budget and an update on the level of Dedicated Schools Grant that was expected to be received in 2013-14.

The main changes from the approved budget plan, after transfers to or from reserves and balances, were as follows:

- Delegated School Budgets showed nil variance;
- Other School Grants showed a £0.013m under spend;
- SEN provisions and support services showed a £0.536m over spend;
- Pupil behaviour showed a £0.067m under spend;
- School staff absence and other items showed a £0.135m under spend;
- Combined Service Budgets showed a £0.050m under spend;
- Early Years provisions and support services showed a £0.022m under spend;
- Support to schools in financial difficulty showed a £0.258m under spend;
- DSG, change from original estimate, showed £0.340m additional income.

Overall, the centrally managed items in the Schools Budget had under spent by £0.119m, which must be retained in a ring fenced earmarked reserve for use in a future Schools Budget. When added to the £0.368m accumulated surplus at the start of the year, this resulted in £0.517m of unallocated reserves of which £0.040m was proposed to be transferred to a new earmarked School Meals Catering Re-tender Reserve.

In terms of making use of earmarked reserves, the main change in-year related to the £0.088m set aside to finance the Turnaround Project which had now been fully spent. This project was for a new provision for pupils at risk of exclusion who would receive specialist support away from the school but still be on the school roll. Turnaround was a good programme with obvious benefits to young people, their families and schools. Future work in this area was dependent upon resources being identified from school budgets.

RESOLVED that the Schools Forum:

- NOTED** that the outturn expenditure for 2012-13, subject to audit, showed spend of £77.515m which was £0.025m more than the approved budget (paragraph 5.4);
- NOTED** that after transfers to and from earmarked reserves, the Schools Budget under spent by £0.349m, which when added to the £0.168m year end balance, created a general reserve that amounts to £0.517m (paragraphs 5.5 and 5.9);
- NOTED** that the current balances on specific earmarked reserves within the Schools Budget amount to £5.955m (Table 1, paragraph 5.7);
- REQUESTED** to the council's Executive that a new School Meals Catering Re-tender Reserve was created within the Schools Budget in the value of £0.040m (paragraph 5.11).

41. **Dates of Future Meetings**

The Forum noted that its next scheduled meeting on 18 July 2013 was cancelled due to insufficient business. The following meeting of the Forum was scheduled for Thursday 12 September 2013 at 4.30pm in the Council Chamber at Easthampstead House.

CHAIRMAN

**TO: SCHOOLS FORUM
12 SEPTEMBER 2013**

**2014-15 SCHOOLS BUDGET – PRELIMINARY UPDATE
(Director of Children, Young People and Learning)**

1 PURPOSE OF REPORT

- 1.1 The purpose of this report is to present the Schools Forum with an update on the arrangements required for the 2014-15 Schools Budget and to seek agreement to distribute the briefing note and consultation document at Annex A to all schools and interested parties.
- 1.2 The briefing note and consultation document sets out the mandatory changes that will apply to next year's budget and also seeks views from schools on whether central management should continue on the budgets subject to 'de-delegation' and whether any changes should be made to the arrangements where there is a choice.

2 RECOMMENDATIONS

The Schools Forum:

- 2.1 **NOTES that all the mandatory changes required by the DfE are expected to be straightforward to implement, with minimal impact anticipated (paragraphs 5.9 and 5.10);**
- 2.2 **NOTES the changes needed to be made to comply with the DfE Funding Regulations and the approaches to be taken (paragraph 5.20);**
- 2.3 **NOTES that work is ongoing to establish the reasons behind the high proportionate spend on rates compared to other LAs (paragraphs 5.21 to 5.24);**
- 2.4 **AGREES that the briefing note and consultation document at Annex A is distributed and that views of schools on the questions posed are gathered and taken into account when the 2014-15 budget is set (paragraph 5.25);**
- 2.5 **NOTES the provisional timetable for the production of 2014-15 school budgets (paragraph 5.26).**

3 REASONS FOR RECOMMENDATIONS

- 3.1 To ensure the views of schools are incorporated in a timely fashion into the planning process for 2014-15 individual school budgets.

4 ALTERNATIVE OPTIONS CONSIDERED

4.1 None.

5 SUPPORTING INFORMATION

Background

- 5.1 National funding reforms were implemented from April 2013 as part of the government objective to introduce a national funding formula for education. This is designed to ensure funds are distributed in accordance with the key policy objective of maximising money into schools with an emphasis on per pupil funding allocations, with top-ups paid for the pupils that need it the most i.e. those from deprived backgrounds, low attainment scores.
- 5.2 Many changes were required in Bracknell Forest (BF) which resulted in a widespread redistribution of funding between schools, although the final impact was moderated by the Minimum Funding Guarantee (MFG) which limited per pupil funding reductions to no more than 1.5%. The cost of meeting the MFG top up payments is being financed by scaling back increases due to schools gaining through the reforms.
- 5.3 The process was well managed in BF through a consultative approach that used a School Funding Review Group with Headteacher, governor and bursar membership to ensure the views of schools were taken into account as proposals were developed.
- 5.4 The changes required by the DfE so far have concentrated on ensuring that all Local Authorities (LAs) distribute funds to schools on a standardised and much simplified basis, and is within a tightly defined and regulated framework, with limited scope for local discretion.

Change requirements for 2014-15 school budgets

- 5.5 Further changes are required from April 2014, although these are more straightforward. They centre on the outcomes from the review of the April 2013 reforms undertaken by the Department for Education (DfE) that was published on 4 June and which examined whether the reforms are working as intended and whether there are any unintended outcomes.
- 5.6 The DfE continue to closely monitor each LA's progress against the reforms and will again require submissions at 31 October 2013, which must confirm the Funding Formula to be used next year, and 21 January 2014, which must confirm the actual units of resource to be used in 2014-15 budgets.

BF approach to change

- 5.7 Taking account of the fact that BF currently uses all of the permitted funding factors where qualifying criteria is met, the Schools Forum agreed in June that no changes need to be considered in the structure of the Funding Formula. However, the Forum did agree that a consultation should be undertaken with schools on whether the right amount of funds were being allocated through each of the factors of the Funding Formula. This is consistent with the DfE requirement for LAs to review the funding arrangements put in place at April 2013 and allows for a September / October consultation with schools. There is then sufficient time for comments to be

incorporated in budget decisions that will need to be taken in advance of the final data submission to the DfE, which must be no later than 21 January 2014.

- 5.8 Whilst fewer questions are included in the consultation compared to last year, due to the scale of changes being introduced, the document has been expanded to include an overview of the new funding framework which highlights the areas considered most important to BF. This results in a longer document than originally envisaged, and in order to provide a concise overview, a 3 page executive summary has been added at the start of the document.

Changes for consideration

Mandatory changes required by the DfE

- 5.9 The following represents the change areas for next year that must be taken into account:
1. LAs must allocate a minimum of 80% of delegated Schools Block funding through the available pupil-led factors i.e. age weighted pupil unit (AWPU), deprivation, prior attainment, looked after children and English as an additional language. The BF rate is 88.3%.
 2. Minimum AWPU values have been set by the DfE at £2,000 for primary pupils and £3,000 for secondary pupils. BF rates are £2,849 and £4,080 respectively.
 3. Test data that must be used for prior attainment funding will be changed. Changes to the Early Years Foundation Stage Profile mean that different aged pupils will have a different methodology of funding next year. Those taking the old profile – Years 2 to 5 - will continue to be funded in BF where scores are below 78. For those taking the new Profile from September 2012 – Year 1 pupils - funding will be allocated to pupils who did not achieve the expected level of development in all 12 prime areas of learning as well as mathematics and literacy. The DfE, allow the funding threshold to be set at below either 78 or 73 for pupils in Years 2 to 5 but there are no plans to change the 78 threshold currently in use in BF. There will be a widening of eligible pupils in Key Stage 2 tests that fund secondary schools to include pupils that did not achieve Level 4 in English **or** mathematics, rather than only those pupils not achieving in both. Effectively doubling the cohort means the unit of resource needs to be halved to remain within budget. Based on 2012 test results, which will be updated to 2013 for next year's budget, this change tends to move money away from schools achieving the lowest results at Key Stage 4 and reflects the wider incidence of pupils failing on only one measure in the better performing schools.
 4. LAs and Schools Forums need to consider whether they are allocating the right amount of resources to schools through deprivation measures. This is covered in more detail below at paragraph 5.15.
 5. Funding schools for pupil mobility will be targeted to only those with more than 10% in-year turnover, rather than all in-year admissions as at present. This change means that funding will be allocated to schools in a similar way to that operated in BF before the funding reforms. It results in only 6 primary schools qualify for funding, rather than all 31. No secondary schools qualify.
 6. A new factor will be allowed to reflect sparsity. This is intended to protect rural schools, and in particular the viability of small schools. No BF schools qualify under the DfE criteria so this is not a valid factor in BF.

7. There must be a representative on the Schools Forum from a provider of education to 14-25 year olds, other than a school. These providers have an interest in SEN funding allocations.
8. All LAs must adopt the £6,000 funding threshold for high needs pupils. Schools must cover the cost of SEN support needs up to this level from their general delegated budget. The BF rate is £6,080 so a minor change is needed but there will be no adverse financial impact on schools as funding up to the £6,080 level was added into school budgets at April 2013 and the £0.015m extra funds allocated to schools is not considered significant enough to seek to remove.

5.10 At this stage, it is expected to be a straightforward process to meet the new mandatory changes and that in most areas there is a minimal impact.

Discretionary changes where views will be sought from schools

- 5.11 The DfE have indicated that all LAs and Schools Forums should review school funding arrangements for 2014-15. There is no specific requirement on how this should be done or what it should cover, so each LA needs to adopt their own approach.
- 5.12 Taking account of the detailed work undertaken through the School Funding Review Group for the changes made at April 2013, and in the absence of any significant concerns raised since, there seems no obvious areas for change in the way that schools are funded in BF. However, significant changes were made which makes it appropriate to undertake a review to test the impact and provide schools with an opportunity to make comments.
- 5.13 The approach taken has been to focus on how the BF Funding Formula compares to our statistical neighbours and the all England average in terms of the proportion of funds allocated through each factor in the Funding Formula. Significant differences would indicate that change may be appropriate, but local circumstances may mean that a difference is expected and desirable. Therefore, views will be sought from schools on what is considered the right proportion of funds to be distributed through each factor.
- 5.14 Appendix 3 of the attached briefing note and consultation document shows the LA Funding Formula analysis in full and the relevant proportions being used.
- 5.15 The draft consultation is not making any recommendations for change, but is seeking views from schools on the questions raised in order for the Forum to take a strategic approach to change when all the relevant budget information is available. This may result in an inconclusive set of responses from schools but is nonetheless considered the correct approach to take.
- 5.16 The key areas where views of schools are being sought on discretionary changes relate to:
 1. Assuming that no additional resources are added into the 2014-15 financial settlement from the DfE, then if there is a wish to allocate more funds through existing factors in the Funding Formula, then to balance the budget, a corresponding deduction will need to be made elsewhere. The consultation assumes that any deduction will be made to the AWPU where BF is in the highest 12.5% of all LAs and the 3rd highest in the statistical group of 11 LAs.

If the view of schools is that more money should be distributed through some factors, the Forum can reconsider the need for deductions to AWPU once the 2014-15 financial settlement is known, as this may provide an overall increase in funds.

2. Should BF allocate at the statistical neighbour average median rate? For:
 - a. prior attainment; which would need £0.060m added.
 - b. deprivation; which would need £0.319m added.
 - c. fixed lump sum allocation; which would need £0.372m added.

If schools want to move to the average rate on all of the above factors, and this is agreed by the Forum, then to maintain the cost neutral approach, AWPU funding would reduce from 81% to 79% and from £2,849 in primary to £2,798 and £4,080 to £4,030 in secondary. These lower rates would remain significantly above the minimum values set by the DfE.

3. For the fixed lump sum allocation. The maximum allowable amount is being reduced from £200k to £175k, but differential primary / secondary rates are allowed for the first time next year, so views are being gathered on whether the BF rate of £150k should be changed.
4. Whether schools again support de-delegation of the prescribed services i.e. support to schools in financial difficulty, under performing ethnic minority pupils, SIMS and other licence fees and staff supply cover, such as maternity leave absence. This amounts to £0.842m of funds and DfE require this to be an annual question for the Schools Forum, so views are planned to be sought from all schools to help inform the decision.
5. Behaviour Support Services will be delegated for the first time in April 2014. Schools will be offered new SLAs for a range of targeted services that they can buy into if required, which in total aggregates to £0.389m. In respect of the time limited Consistency Management & Cooperative Discipline CMCD® programme, it is proposed to cancel this programme and allocate the £0.032m of funds currently spent supporting three secondary schools to all secondary schools on an amount per pupil basis. The LA will not offer an SLA to continue this programme.
6. Schools will also be asked if they have any other comments on the funding arrangements in BF which will provide an opportunity to make representations on the less significant parts of the Funding Formula.
7. Views are also being sought on whether a separate SEN contingency should be created in the High Needs Block i.e. outside delegated school budgets, to make additional payments to schools with a disproportionate number of high needs pupils (i.e. those with over £6,000 of support needs). This was discounted for 2013-14 as the MFG applied top up funding for any per pupil losses in excess of 1.5%, which was consistent with managing funding losses arising from all other changes from the reforms. However, there may be issues around managing a large size of high needs pupils which results in higher costs than the individual assessed needs of each pupil and also ensuring relevant schools continue to take the pupils, with the possible alternative being more expensive out of borough placements. An outline of how such a fund could operate, which would create a budget pressure, provisionally assumed at £0.100m, is included on the consultation document for comment.

- 5.17 Exemplifications on the potential impact from the changes on individual schools are included in the consultation but there are limitations to their accuracy and schools are warned to view the results with caution and to consider the merits of the principle behind each change and to not just consider the illustrated financial impact. The main issues that schools are being asked to be aware of are:

Unrestricted

- The 2014-15 data set e.g. pupil numbers and deprivation and low prior attainment scores are not yet available so the financial implications are being calculated against 2013-14 data. The impact could change significantly when actual budgets are calculated against the revised data.
 - The impact of moving to allocating funds for prior attainment, deprivation and fixed lump sum allocations to the average statistical neighbour rate costs £0.751m and the illustrations assume an appropriate deduction to AWPU values will be made to maintain a cost neutral effect. This may not be how such a change, if agreed, would ultimately be financed.
- 5.18 In terms of the funding protection provided through the MFG calculation, whatever the outcomes of the operation of the local Funding Formula, per pupil funding can reduce by no more than 1.5% each year. This means that all things being equal, where relevant, the amount of MFG relevant schools receive each year will reduce by up to 1.5% of per pupil funding. Therefore, even if no changes are made at April 2014, schools receiving MFG top up in 2013-14 will receive less financial support in 2014-15, and those contributing to the cost would retain more of their gain.

Changes needed to comply with latest Regulations and guidance

- 5.19 In reviewing the arrangements put in place from April 2013, a small number of adjustments need to be made to properly comply with the latest DfE Regulations and guidance. These are mainly technical matters with minimal impact envisaged, but nevertheless need to be corrected.
- 5.20 The areas needing change to comply with the new funding framework are:
1. There is £0.052m centrally retained in the Schools Budget that is used to pay one-off premature retirement / dismissal costs of staff at schools undergoing re-organisations. This retained budget is not allowed to be increased from the previous year, so over time, with inflation, faces a real terms reduction in buying power. It has also recently been clarified by the DfE that it can only be used to fund the cost of decisions taken before 1 April 2013, so has a very limited life span. In order to maintain a fund to finance such costs in future, funding would need to be included in delegated school budgets. So that the budget can be targeted towards only those schools facing relevant costs, which can be significant, it is proposed to seek agreement to de-delegate the funds and then allocate funding top ups in-year to relevant schools at the amount of actual costs being faced. The redundancy funding policy will need to be updated to incorporate this change although there will be no material change in its application.
 2. There is £0.110m in the centrally managed school specific contingency to fund additional financial support to new, amalgamating or closing schools and to meet exceptional unforeseen costs in primary schools which are generally more difficult to manage than in secondary schools. The majority of this budget - £0.100m - has been established exclusively to be paid in-year to Jennett's Park Primary school as it moves from a 1 FE school to a 2 FE school from September 2013, at which point there will be a consequential increase in cost base that is not recognised in the initial 2013-14 budget. The remaining £0.010m has been retained to support primary schools facing exceptional, unforeseen costs. The correct way to manage this funding is as a de-delegated item, and it is therefore proposed to include the £0.110m funding within delegated school budgets, on a per-pupil basis to primary schools only, and then seek agreement to de-

delegate the funds so funding top-ups can be passed on only to Jennett's Park Primary school and other qualifying schools. The amount required in this budget will be reviewed during the course of setting the 2014-15 budget and is expected to be reduced.

3. The cost of checking pupil eligibility to a free school meal is a Schools Budget funding responsibility, but to date, BF has not recharged any costs associated with undertaking this function. Based on the recent increase in work in this area and the clear and significant funding benefits to schools from maximising the number of Free School Meals pupils on the school census, it is timely to seek agreement from schools to charge the Schools Budget the appropriate cost, which is estimated at around £0.020m. This would be a budget pressure on the Schools Budget and would need to be included in delegated school budgets and then seek agreement to de-delegate so that funds are returned to finance the cost of the process.

Comparisons with statistical neighbours

- 5.21 The amounts allocated through each factor by BF compared to the statistical neighbours and all England in the summary information of LA Funding Formulas (see Appendix 3 of the consultation document) are broadly in line with expectations. The one exception to this relates to rates, where at 2.26% of funds allocated, BF has the highest proportionate spend of the statistical neighbours, where the average rate is 1.31%, and the second highest in all England, where the average is 1.21%.
- 5.22 Part of the reason for the high proportional amount of spend relates to the small number of academy schools in BF as academy schools are treated as charities and therefore receive an 80% rebate on their rates bill. An analysis of rates bills for schools in Berkshire shows average spend of 1.47% based on actual cost of rates, which increases to 2.03% if all schools paid full rates liabilities. The rate for BF would increase to 2.51%.
- 5.23 The other main factor that accounts for the relative high cost of rates in BF is the impact of the rebuild at Garth Hill. This change resulted in the rates liability increasing by £0.205m. If the old rates liability is used, then the BF proportion of spend would be at 2.16%, just above the area average of 2.03%.
- 5.24 Other factors impact on rates liability such as regional characteristics and the size and age of buildings. More work is being undertaken in this area, including surveying other LAs for more data and advice has also been requested from the Council's Corporate Property Team.

Next Steps

- 5.25 The Forum is recommended to agree that the briefing note and consultation document at Annex A is distributed to all schools in order to gather views on 2014-15 budget matters.
- 5.26 The anticipated timeline for key events in setting the 2014-15 School Budget is as follows:
 1. 12 Sept / Oct - Headteacher briefing
 2. 12 September – Schools Forum approval of consultation document
 3. 16 September to 25 October – consultation period
 4. 19 September – Bursar briefing
 5. 15 October – evening briefing for governors (if required)

6. 17 October – Schools Forum agree draft 2014-15 Funding Formula statement for submission to DfE i.e. no change to the Funding Formula from 2013-14 or core data (other than that associated with new criteria for KS2 tests and mobility, both of which are subject to update) but with 2014-15 estimated units of resource.
7. 31 October – deadline for data submission to DfE
8. 28 November – Schools Forum consider outcomes from consultation and initial budget proposals for 2014-15
9. 12 December – Executive agree that the Executive Member can set the level of Schools Budget, up to the level of anticipated income
10. TBD December – Executive Member to agree outline for setting the 2014-15 Schools Budget,
11. 16 December – DfE release the data required to calculate 2014-15 school budgets
12. 20 December – indicative 2014-15 budgets issued to schools. This will be based on data collected by BFC from the October 2013 school census, not the 16 December data set from the DfE. BF will not have access to all data sets at this time e.g. test scores, so budgets will be provisional.
13. 16 January – Schools Forum propose units of resource for 2014-15 Funding Formula for inclusion on DfE data return. Note, this is a new meeting required to meet the DfE data submission deadline and will replace the currently schedule 4 February meeting.
14. 20 January – Executive Member agrees units of resource for 2014-15 Funding Formula for inclusion on DfE data return.
15. 21 January – deadline for data submission to DfE
16. 28 Feb – 2014-15 budgets issued to schools

2015-16 school budgets

- 5.27 The DfE are expected to begin the process of introducing a national funding formula for schools from 2015-16. This is expected to move money between different LAs although at this stage, the pace of change, and likely impact in BF is unknown.

6 ADVICE RECEIVED FROM STATUTORY AND OTHER OFFICERS

Borough Solicitor

- 6.1 The relevant legal issues are addressed within the main body of the report.

Borough Treasurer

- 6.2 The Borough Treasurer is satisfied that no significant financial implications arise from this report and the issuing the consultation document.

Impact Assessment

- 6.3 Not considered at this consultation stage.

Strategic Risk Management Issues

- 6.4 Not considered at this consultation stage

7 CONSULTATION

7.1 Not applicable for this report.

Background Papers

School Funding Reform: Findings from the Review of 2013-14: Arrangements for 2014-15
<https://www.gov.uk/government/publications/school-funding-reform-findings-from-the-review-of-2013-to-2014-arrangements-and-changes-for-2014-to-2015>

2014-15 Revenue Funding Arrangements: Operational Guidance fro LAs
<https://www.gov.uk/government/publications/2014-to-2015-revenue-funding-arrangements-operational-information-for-local-authorities>

Contact for further information

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**RESPONDING TO DfE REFORM
OF SCHOOL FUNDING**

**A BRIEFING NOTE AND
CONSULTATION WITH SCHOOLS**

SEPTEMBER 2013



Introduction

The purpose of this briefing note and consultation is to provide an update on the latest stage of funding reforms and gather views from **primary and secondary** schools and other interested parties on potential changes to school funding arrangements in Bracknell Forest (BF). These proposals have been prepared in response to national funding reforms introduced by the Department for Education (DfE) with the latest phase of changes required to be implemented from April 2014.

The key areas where views are being sought from schools relate to the amount of funds distributed through the Funding Formula by the different factors e.g. pupil numbers, deprivation measures, low prior attainment etc. There are no proposals to change the factors currently being used or introduce new ones.

This is a more straightforward consultation than last year, with the DfE requiring Local Authorities (LAs) to review their Funding Formula rather than having to make significant changes.

To help guide the process, the Schools Forum has reviewed and approved the questions posed in this consultation document. The Forum is not making any recommendations for change but is seeking to gather views from schools on the issues raised so they can be taken into account when budget decisions for 2014-15 are taken.

2014-15 budget planning

This consultation also asks schools to identify areas of budget pressure or development which they would like to be considered. Any requests will be **subject to sufficient funds** and prioritisation by the Schools Forum, as part of the normal budget setting process.

Information session

This consultation will be supported by an evening briefing on 15 October. The session will commence at 7.00 pm and be held at the Education Centre (Donnington Room) and will explain the key issues raised and the potential implications. The session will address each question on the consultation and provide an opportunity for attendees to raise questions. The intended audience is governors. Head teachers and bursars will receive briefings through the normal half-termly meetings that have already been scheduled.

If you plan to attend the briefing, please can you confirm to:

education.finance@bracknell-forest.gov.uk

The BF consultation documents can be found at the following website address.

Insert hyperlink

Responses

A separate response form accompanies this consultation, and you are asked to return your signed reply, **by Friday 25th October 2013**, to:

Education Finance, Bracknell Forest Council
Time Square, Bracknell, RG12 1JD

Who should respond to this consultation?

The Chair of governors, in consultation with the headteacher and other governors.
Other relevant organisations.

Queries

If you have any queries on this consultation, please contact

Paul Clark, Head of Departmental Finance
Telephone 01344 354054
Email: paul.clark@bracknell-forest.gov.uk

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Executive Summary

1. This document updates schools on the latest stage of Department for Education (DfE) school funding reforms and also seeks views on whether any changes should be introduced in Bracknell Forest (BF).
2. National funding reforms were implemented from April 2013 as part of the government objective to introduce a national funding formula for education. This is designed to ensure funds are distributed in accordance with the key policy objective of maximising money into schools with an emphasis on per pupil funding allocations, with top-ups paid for the pupils that need it the most i.e. those from deprived backgrounds, low attainment scores.
3. Further, more straightforward changes are required from April 2014, which centre on whether the changes introduced to date are working as intended.
4. The DfE continue to closely monitor each Local Authority's (LA) progress against the reforms and will again require data at 31 October 2013 and 21 January 2014, which must respectively confirm the Funding Formula and actual units of resource to be used in 2014-15 budgets.
5. To meet these requires, in June 2013, the Schools Forum agreed that a consultation should be undertaken with schools on whether the right amount of funds were being allocated through each of the factors of the Funding Formula. This is consistent with DfE expectations for LAs to review the April 2013 funding arrangements.
6. Whilst fewer questions are included in the consultation compared to last year, there is a large amount of new information that will be of interest to schools and therefore the document has been expanded to include an outline of the wider funding framework.
7. The mandatory changes that are required next year are set out below. At this stage it is expected to be a straightforward process to meet these new requirements with minimal impact expected to arise in most instances.
 - a) LAs must allocate a minimum of 80% of delegated Schools Block funding through the available pupil-led factors – core per-pupil funding, deprivation, low prior attainment, looked after children and English as an additional language. The BF rate is 88.3%.
 - b) Minimum core per-pupil funding values have been set at £2,000 for primary and £3,000 for secondary school pupils. BF rates are £2,849 and £4,080 respectively.
 - c) The test data to be used for prior attainment funding will be changed. This reflects changes in the assessments now being made in the Early Years Foundation Stage profile, and widening eligible pupils in Key Stage 2 tests that fund secondary schools to include pupils that did not achieve Level 4 in English **or** mathematics, rather than only those pupils not achieving in both. This has the effect of doubling the number of pupils eligible for funding and means the unit of resource needs to be halved to remain within budget. It also results in a different distribution of funding between secondary schools.
 - d) LAs and Schools Forums need to consider whether they are allocating the right amount of resources to schools through deprivation measures.
 - e) Funding schools for pupil mobility will be targeted to only those with more than 10% in-year turnover, rather than all in-year admissions as at present. This

means only six primary schools qualify for funding in BF, rather than all 31. No secondary schools qualify.

- f) A new factor will be allowed to reflect sparsity. This is intended to protect rural schools, and in particular the viability of small schools. No BF schools qualify under the DfE criteria so this is not valid.
- g) There must be a representative on the Schools Forum from a provider of education to 14-25 year olds, other than a school.
- h) All LAs must adopt the £6,000 funding threshold for high needs pupils. Schools must cover the cost of special educational needs (SEN) support up to this level from their delegated budget, which is approximately 16 hours a week support. The BF rate is £6,080 so a minor change is needed but there will be no adverse financial impact on schools.

8. This consultation is not making any recommendations for change on the discretionary areas but is seeking views from schools in order to inform on the 2014-15 budget setting process. The focus of questions has been to see how the arrangements in BF compare to our statistical neighbours and the all England average. Appendix 3 of this document sets out the core information used for this purpose. The key areas where views of schools are being sought relate to:

- a) If more funds are to be allocated through one of the factors, the overall impact needs to be cost neutral and a relevant deduction will be made to the core per-pupil funding amount where BF is in the highest 12.5% of all LAs and the 3rd highest in the statistical group of 11 LAs.
- b) Should BF allocate at the statistical neighbour average – median – rate for:
 - i. Prior attainment; which would need £0.060m added.
 - ii. Deprivation; which would need £0.319m added.
 - iii. Fixed lump sum allocation; which would need £0.372m added.

Moving to the average rate, and to maintain the cost neutral approach, core per-pupil funding would reduce from 81% to 79% and from £2,849 in primary to £2,798 and £4,080 to £4,030 in secondary.

- c) For the fixed lump sum allocation, the maximum allowable amount is being reduced from £200k to £175k, but differential primary / secondary rates are allowed for the first time next year, so views are being gathered on whether the BF rate of £150k should be changed.
- d) Whether schools again support de-delegation of budgets i.e. passing back money for Council management. This relates to support to schools in financial difficulty, under performing ethnic minority pupils, SIMS and other licences and staff supply cover, such as maternity leave absence and amounts to £0.843m.
- e) £0.389m of funds to support Behaviour Support Services will be delegated for the first time in April 2014. New SLAs will be available for schools to purchase a range of targeted support services.
- f) Views are also being sought on whether a separate SEN contingency should be created outside delegated school budgets i.e. in the High Needs Block, to make additional payments to schools with a disproportionate number of high needs pupils (those with over £6,000 of support needs). Creating such a fund would be a budget pressure.

9. Exemplifications on the potential impact from the changes on individual schools are included in the consultation but there are limitations to their accuracy and schools are therefore warned to view the results with caution. The main issues to be aware of are:

- a) The 2014-15 data set e.g. pupil numbers and deprivation and low prior attainment scores are not yet available so the possible changes are being modelled on 2013-14 data. This could change significantly.
- b) The impact of moving to allocating funds for prior attainment, deprivation and fixed lump sum allocations to the average statistical neighbour rate costs £0.751m and the illustrations assume an appropriate deduction to AWPU values will be made to maintain a cost neutral effect. This may not be how such a change, if agreed, would ultimately be financed.

Schools are therefore asked to consider whether the principle behind the potential change is supported and not just consider the indicated financial effect.

10. In reviewing the arrangements put in place from April 2013, a small number of adjustments need to be made to properly comply with DfE Regulations and guidance. These are mainly technical matters with minimal impact envisaged, but nevertheless need to be corrected. They relate to:

- a) There is £0.052m centrally retained in the Schools Budget that is used to pay one-off premature retirement / dismissal costs of school staff. This retained budget is not allowed to be increased from the previous year and can only be used to fund the cost of decisions taken before 1 April 2013, so has a very limited life span. If a general budget is to be available in future to meet such costs, it will need to be included in delegated school budgets and then be subject to de-delegation in order for funding top ups to be made in-year to relevant schools only, at the amount of actual costs being faced.
- b) There is £0.110m in the centrally managed school specific contingency to fund additional financial support to new, amalgamating or closing schools and to meet exceptional unforeseen costs in primary schools. The majority of this budget - £0.100m - has been established exclusively to be paid in-year to Jennett's Park Primary school as it moves from a 1 FE school to a 2 FE school. The remaining £0.010m has been retained to support primary schools facing exceptional, unforeseen costs. The correct way to manage this funding is as a de-delegated item, and it is therefore proposed to include the £0.110m funding within delegated school budgets, on a per-pupil basis to primary schools only, and then seek agreement to de-delegate the funds so funding top-ups can be passed on in-year only to Jennett's Park Primary school and other qualifying schools.
- c) The cost of checking pupil eligibility to free school meals is a Schools Budget funding responsibility, but to date, BF has not recharged any costs associated with this function. To reflect a recent increase in work in this area with the objective of maximising the number of Free School Meals pupils on the school census, thereby increasing income to schools from the Pupil Premium, a new charge of around £0.020m needs to be made to the Schools Budget, which would be a budget pressure.

11. The amounts allocated by BF compared to the statistical neighbours and all England in the summary information of LA Funding Formulas (see Appendix 3) are broadly in line with expectations. However, there is one area that stands out as unexpected and requiring further examination, and this relates to rates, where at 2.26% of funds allocated, BF has the highest proportionate spend of the statistical neighbours, where the average rate is 1.31%, and the second highest in all England, where the average is 1.21%. Work is underway to establish the reason for the relative high cost and whether any actions can be taken to make a reduction.

Background to Education Funding

12. LAs are funded for their Schools Budget responsibilities through the ring fenced Dedicated Schools Grant (DSG). The amount of DSG that each LA receives and what it can be spent on are set by the DfE and this determines the minimum amount of money in the Schools Budget.
13. The DSG can only be spent on items defined by the DfE as being within the Schools Budget and this has two elements: amounts delegated to schools; and amounts held centrally by LAs.
14. Funding is allocated to schools through the Funding Formula for Schools¹ which is agreed locally from a set of formula factors that the DfE allows to be used (see Appendix 1 for a full list of available factors). Other significant elements of the national funding framework include guaranteeing each school a maximum decrease in annual per-pupil funding (the 'Minimum Funding Guarantee' (MFG)) and conveying powers to the local Schools Forum² which each LA must establish to assist in education budget setting and other financial and contractual matters.
15. Funding is retained by LAs to finance a range of services to pupils and schools that are not suitable for delegation. The main services managed by BFC on behalf of schools are special educational needs provisions and support services for high needs pupils, education out of school, early years provisions and support and combined services that support children's social care.

DfE funding reforms implemented in April 2013

16. Following a period of consultation, in 2012 the DfE started a process to reform school funding so that it becomes "fairer, more consistent and transparent and so that funding intended for education reaches schools and the pupils that need it most". In light of this, following consultation with schools and agreement of the Forum, in April 2013, significant changes were introduced to the BF Funding Formula which resulted in a widespread redistribution of funding between schools. In accordance with DfE requirements, the impact of these changes was moderated by the MFG so that no school could lose more than the 1.5% in per-pupil funding. It was agreed through the consultation that those schools receiving a financial gain from the reforms would have the amount reduced in order to finance the cost of the MFG top up payments being made to prevent any school losing more than 1.5% in per-pupil funding.
17. Other significant changes arising from the reforms that had an impact in BF included:
 - i. Recommending all schools in the country to meet the first £6,000 of additional support needs of individual pupils from within general funding, as allocated through the local Funding Formula. The previous threshold in BF was £1,900. To make this affordable for schools, budgets were increased by a transfer from the "statementing" budget, which had previously funded costs between £1,900 and £6,000, but on an

¹ The Funding Formula for Schools is the mechanism used to distribute funds to schools. It uses objective criteria with set units of resource and is applied equally to schools with the same characteristics. The Funding Formula is developed each year through consultation with schools. Factors used to distribute funds to schools must be from those on the approved DfE list.

² Each LA is required to create a Schools Forum to represent Education providers and partners. The membership of the BF Forum has been drawn from head teachers, governors and representatives of the teacher associations, diocesan boards, Early Years providers, the 14-19 Partnership and the local Academy school.

individual named pupil basis, with funding top-ups paid to relevant schools;

- ii. Additional delegation to schools for services that could previously be managed centrally by LAs. However, where agreed by the local Schools Forum, the funds could be “de-delegated” and returned for LA central management. De-delegation was approved in BF for support to schools in financial difficulty, support to underperforming ethnic minorities and bi-lingual learners, SIMS and other licence fees and staff supply cover for official duties. De-delegation was also agreed for behaviour support services, but for one year only. Funding for 14-16 flexible learning could not be de-delegated and is now retained by secondary schools;
 - iii. Creating a separate fund from primary school budgets to be targeted towards schools experiencing additional costs arising from Key Stage 1 class size regulations that limit teaching to 30 children per teacher;
 - iv. The DSG was re-configured in 2013-14 and now has three component parts, rather than a single per-pupil amount of funding; the Schools Block that funds individual school budgets and a limited range of centrally managed budgets; the Early Years Block that funds provisions for 2, 3 and 4 years olds, again with a limited range of centrally managed budgets; and the High Needs Block that funds support needs of pupils where these are assessed to be above £6,000. The funding allocated to each of these “Blocks” in 2013-14 was based on 2012-13 budgets, adjusted for changes in pupil numbers in mainstream schools and children receiving early years provisions. This change is in preparation for the introduction of a national funding formula sometime from 2015 that will redistribute funding between LAs;
 - v. Setting school budgets on the most recent October, rather than January census, to allow for earlier publication of budgets.
18. To help guide the process and to ensure views of schools were taken into account in the framing of the changes that were implemented in April 2013, the Schools Forum established a School Funding Review Group, with membership from headteachers, governors, school bursars and LA officers to work through the new requirements and agree the questions that needed to be asked of schools. Final changes to funding arrangements were agreed by the Schools Forum, after taking account of comments from schools.

For information, Appendix 2 shows the factors and units of resource used in the 2013-14 Funding Formula.

Changes to be considered for April 2014

19. During April and May, the DfE undertook an assessment of the impact of the changes being introduced from April 2013, to ensure that the reforms were working as intended and specifically to identify any unintended outcomes. The DfE were also looking to identify any other changes that may be required to assist in the longer term goal of introducing a national funding formula. The overriding aim for April 2014 was for limited change, as time was needed for the most recent reforms to take effect.
20. The outcome from this review was that in June the DfE confirmed that most of the arrangements put in place have delivered what was intended and will remain in place, with a small number of changes being introduced from April 2014.

The relevant DfE review documents can be accessed at:

School Funding Reform: Findings from the Review of 2013-14: Arrangements for 2014-15 (45 pages)

<https://www.gov.uk/government/publications/school-funding-reform-findings-from-the-review-of-2013-to-2014-arrangements-and-changes-for-2014-to-2015>

2014-15 Revenue Funding Arrangements: Operational Guidance fro LAs (39 pages)

<https://www.gov.uk/government/publications/2014-to-2015-revenue-funding-arrangements-operational-information-for-local-authorities>

21. This consultation from BFC seeks comments from schools and other interested parties on relevant matters which are set out in detail below from paragraph 28. The documentation also provides an update on the latest stage of funding reforms.

Bracknell Forest approach to the reforms

22. Arrangements regarding education funding in Bracknell Forest have been well established on the basis of a partnership with schools and the Schools Forum. Taking account of the DfE review of the outcomes from the latest review of funding reforms, the Schools Forum does not consider that any further changes are required to the Funding Formula in terms of the factors to be used to distribute funds to schools, but there are a number of issues where views should be sought from schools. However, the changes likely to be required were not considered significant enough to reconvene the School Funding Review Group.
23. In considering whether changes are required to the way funds are allocated to schools, use has been made of data made available from the DfE on the composition of each LAs 2013-14 Funding Formula. This allows a national perspective on which of the permitted factors have been used and the relative importance placed on them in terms of the proportion of total funds allocated.
24. This can be a useful guide to see how the BF Funding Formula compares to other LAs. To help make a more meaningful comparison, the analysis used restricts detailed comparisons to the BF statistical neighbours (10 other LAs) which the DfE has determined have the closest match to the population characteristics found in BF.
25. As with all statistical data, the analysis needs to be seen as a guide to help form a judgement. It also reflects the first year of the new funding reforms and LAs may be making changes in 2014-15. However, it is up to date and complete, representative of current practices, and the only meaningful comparative data available.
26. Appendix 3 shows an extract of the information by factor for BF and our statistical neighbours. There is also a high level summary of all LAs in England. The Appendix also ranks BF within the statistical neighbours and across England. A rank of 6 in the statistical neighbour group is the mid-point, with 75 being the mid-point for all England.
27. The content of this consultation has been approved by the Schools Forum.

Matters for update and areas where views are being sought from schools

School Block related

Overview

28. The main thrust of the most recent DfE funding review has been to assess the impact arising from the changes made to LA Funding Formulas at April 2013. There are now a very limited number of allowable factors – 13, of which 8 could be, and are used in BF - with further requirements to only use indicators and pupil data for the distribution of funds as provided by the DfE, and in a prescribed and restricted way. The review outcome for each formula factor relevant to BF is detailed in the following paragraphs.
29. On balance, the Schools Forum considers that the DfE review indicates that no changes are required to the factors used in the BF Funding Formula, but that the amount of funds being allocated by the most significant factors should be reviewed. The Forum is not making any recommendations on whether there should be changes, but seeking to gather the views on the issues raised.
30. To help assess the potential financial impact of the changes, exemplifications at individual school level are included as appendices. The possible effect that would arise from setting the amount of funds allocated through the three most significant factors outside core per-pupil funding to the average³ proportion distributed by our statistical neighbours is also modelled. **As always, the exemplifications need to be viewed with caution, with further information on their limitations set out in paragraphs 87 to 89.** Schools are recommended to consider the merits of the principle behind each potential change and to not just consider the illustrated financial impact as this could change considerably when 2014-15 budgets are calculated.
31. If it is agreed through this consultation that different amounts should be allocated through factors of the Funding Formula, it needs to be recognised that there is a finite level of resources in the Schools Budget and if there is a desire to increase funds allocated through one factor, unless there is a sufficient increase in the overall level of resources, a corresponding reduction will need to be made in funds distributed through other factors.

Pupil-led funding

32. One of the prime objectives of the DfE from the funding reforms is to ensure that a high proportion of funding is allocated to schools through pupil-led factors. This approach is designed to encourage popular and good schools to readily admit more pupils in the knowledge that significant funds will follow.
33. To support this objective, from April 2014, the DfE will require all LAs to allocate a minimum of 80% of delegated Schools Block funding through the available pupil-led factors – age weighted pupil unit, deprivation, prior attainment, looked after children and English as an additional language. In 2013-14 only two LAs did not meet this level of delegation, with the BF rate being 88.3% which is the 7th highest rate (out of 11) in the BF statistical neighbour grouping and 113th highest in England (out of 151).

³ Average in this document means the median i.e. the middle value when all results are listed in sequential order. This helps to minimise the effect of any extreme values which may otherwise distort the interpretation.

34. Furthermore, there will be a minimum cash value set for age weighted pupil funding, with the minimum primary rate set at £2,000 and the minimum secondary rate for both Key Stage 3 and Key Stage 4 set at £3,000. Whilst all LAs were above these levels in 2013-14, with the BF rates £2,849 and £4,080 respectively, the minimum rates may be increased in future years.
35. No action is considered necessary in BF relating to pupil-led funding, including needing to meet the new conditions being introduced by the DfE.
36. When looking purely at the distribution of funds based on the age of pupils, BF is in the highest 12.5% of all LAs (19th out of 151) and the 3rd highest in the statistical neighbours. This suggests that if any redistribution of funds through the Funding Formula is considered desirable and agreed, reducing the age weighted pupil unit funding would seem an appropriate course of action to take and move BF closer to the LA average rate.

QUESTION 1

If a redistribution of funds through Formula Factors is supported, do you agree that when this results in an additional cost, it should be funded through a reduction in funds allocated by reference to pupil numbers, where BF is in the highest 12.5% of LAs in terms of funds distributed?

Prior attainment

37. DfE encourage the use of this factor to target funding to schools for pupils with low cost, high incidence SEN below the £6,000 (approx 16 hours per week support) high needs threshold. This has become a more significant factor now that additional funds must be included in general school budgets to support SEN pupils, rather than making funding allocations to schools on the basis of named pupils. Moving from the £1,900 BF funding threshold in 2012-13 to the new level resulted in an additional £1.031m being added to school budgets through factors in the Funding Formula which reflected the cost being incurred on relevant pupils at that time. The method used to distribute the extra funds was agreed at 80% on pupil numbers, 10% on prior attainment and 10% on deprivation measures which resulted in the closest match of funds to each school that could be found in the allowable factors compared to the previous named pupil basis.
38. Changes to the Early Years Foundation Stage Profile mean that different aged pupils will have a different methodology of funding next year. Those taking the old profile – Years 2 to 5 - will continue to be funded in BF where scores are below 78. For those taking the new Profile from September 2012 – Year 1 pupils - funding will be allocated to pupils who did not achieve the expected level of development in all 12 prime areas of learning as well as mathematics and literacy. The DfE, allow the funding threshold to be set at below either 78 or 73 for pupils in Years 2 to 5, but there are no plans to change the 78 threshold currently in use in BF.
39. For secondary aged pupils, funding is currently targeted to pupils that failed to achieve a Level 4 or higher in English **and** mathematics which amounts to around 10% of relevant pupils. As only 20% of pupils who achieved a Level 4 in English **or** mathematics went on to achieve the 5+ (A*-C) GCSEs including English and mathematics, from next year, the measure will be changed so that pupils will be

identified as having low prior attainment if they fail to achieve a Level 4 or higher in English **or** a Level 4 or higher in mathematics. Nationally, this change is expected to identify around 21% of pupils. Based on 2012 data, increasing the number of pupils eligible to funding creates a budget pressure of £1.3m in secondary schools as the number of eligible pupils rises from 537 to 1,422, which is a 112% increase on the amount of funds currently being allocated and represents 23% of relevant pupils.

40. Such an increase in cost is clearly unaffordable. It is proposed to manage this pressure by recalculating the amount of per-pupil funding paid for each eligible pupil by dividing the new, higher number of eligible pupils into the total initial 2013-14 budget. This cash limits the amount of funds allocated to the current level and is therefore cost neutral. It will result in a lower per-pupil funding rate.

QUESTION 2 – SECONDARY SCHOOLS ONLY

Do you agree that the best way to incorporate the extended eligibility criteria that will be used next year for funding secondary schools for pupils with low prior attainment is to reduce the amount of per-pupil funding to a level that ensures the total amount of funds allocated remains unchanged from that allocated in 2013-14 i.e. £1.157m?

41. In 2012 the Key Stage 2 assessment measure was changed. Those pupils taking the old assessments will be identified from the published data. For pupils at Key Stage 2 from 2013 onwards, the English element of the Key Stage 2 measure will identify those who did not achieve a Level 4 in either the reading or teacher assessed writing elements. Grammar, punctuation and spelling test results are excluded “for now”.
42. In 2013-14, at 3.49%, the proportion of funds allocated through the BF Funding Formula was in the bottom half for both the statistical neighbour grouping (7th out of 11) and all of England (92nd out of 151). Schools are now being asked to consider whether this is the right proportion, with the average rate in the statistical neighbour group being 3.59%. Funding at a proportion of 3.59% would distribute an additional £0.060m, and £2.148m in total.
43. Appendix 4 illustrates what the financial effect on each school would have been in the current financial year, if the level of funding via low prior attainment data was set at the 3.59% average rate of our statistical neighbours and original test scores are used i.e. before taking account of the new criteria to be used in actual 2014-15 budgets. The illustration assumes that the £0.060m increase in funds would be financed by a reduction in per-pupil funding, and would therefore be cost neutral overall.

QUESTION 3

The BF Funding Formula currently allocates £2.088m, 3.49% of total funds, to schools based on low prior attainment data. This is £0.060m below the amount that would have been distributed if the rate had been set at 3.59%, the average proportion of funds allocated by our statistical neighbours. Do you think the current BF allocation proportion is:

About Right Too low Too high No view

44. As set out above, the only updated data that can be made available at this stage to model the potential financial impact from the revised eligibility criteria relates to secondary aged pupils that did not achieve a Level 4 or higher in English or mathematics. However, this is based on 2012 data, which will be updated to 2013 numbers for the 2014-15 actual budgets so needs to be viewed as a guide to the likely change in funding. Appendix 5 shows an illustration by school of the potential impact from modelling the new eligibility criteria, which requires the unit of resource to be reduced in order to ensure that there is no overall financial effect from the change.

Deprivation

45. All LAs are required to include a deprivation factor in their Funding Formula which should be used in addition to funding from the Pupil Premium to target resources to pupils from deprived backgrounds who tend to achieve less well than those from less deprived backgrounds
46. Whilst a number of issues were raised from the review, including not being able to use all available deprivation measures, the limited bands allowed if the Income Deprivation Affecting Children Index (IDACI⁴) is used do not fit the deprivation profile of all LAs and that there was funding turbulence in moving from large historic deprivation related grant allocations to distributions through the new allowable measures, there will be no changes for April 2014. As this is a key factor for the DfE, “we are continuing to ask that Schools Forums and LAs determine locally an appropriate proportion or quantum of their schools block funding to allocate through this factor”. BF allocates 3.5% of funding through deprivation measures, which is ranked 7th highest within the 11 statistical neighbours and 135th against all 151 LAs in England.
47. The BF Funding Formula recognises deprivation by using the two measures permitted by the DfE; pupil eligibility to a Free School Meal (FSM), where all pupils in the same phase are funded at the same rate, and which distributes around 40% of deprivation related funds; and IDACI scores, which are weighted through the prescribed range of bands, with funding increasing through the bands as levels of deprivation increase by a factor of 50%. IDACI scores distribute around 60% of deprivation related funds. The IDACI scores associated with each funding band can be seen in row 2 of Appendix 2.
48. Whilst the DfE analysis from 2013-14 LA allocations is a useful starting point, it is also relevant to consider other factors before a determination is made on the appropriate level of funds to be distributed through deprivation measures.
49. The attainment gap in BF, as measured by average points scored at Key Stage 4 between pupils eligible to a FSM and those not was 36 in 2012, and averages 33 over the last 3 years. For all of England, both the 2012 actual gap and average for the last 3 years was 27. For Key Stage 2, results from BF schools in 2012 show a 24% gap between pupils eligible to a FSM and those not in achieving Level 4 or above in English and mathematics compared to an England average of 17%. These measures indicate that the attainment gap is wider in BF than the average for England.

⁴ IDACI measures by geographical area – post codes – the likelihood of a family with school aged children having low income / receiving income related benefits. It scores the likelihood and relative severity of deprivation on a scale from 0 to 1, with a score of 0.5 meaning the family have a 50% chance of having low income / in receipt of income related benefits.

50. LAs can also be measured for deprivation and ranked against each other. Central Government tends to use the Index of Multiple Deprivation (IMD⁵) and this scores BF at 291 out of 326 authorities, putting it in the 10% of least deprived authorities. (Note this ranking is against all LAs and not just authorities responsible for education services). There are also authority wide IDACI scores, where BF scores 10.6 and ranks 7th least deprived unitary authority (out of 151).
51. In 2013-14, at 3.47%, the proportion of funds allocated through the BF Funding Formula was in the bottom half for both the statistical neighbour grouping (7th out of 11) and all of England (135th out of 151). As set out above, there are many ways of measuring deprivation, and different significance can be placed on each one. Schools are now being asked to consider whether this is the right proportion, with the median rate in the statistical neighbour group being 4.00%. Funding at a proportion of 4.00% would distribute an additional £0.319m, and £2.392m in total.
52. Appendix 6 illustrates what the financial effect on each school would have been in the current financial year if the level of funding allocated via deprivation data was set at the 4.00% average rate of our statistical neighbours. The illustration assumes that the £0.319m increase in funds would be financed by a reduction in per-pupil funding, and will therefore be cost neutral overall.
53. Any change in proportion of funds allocated to schools through deprivation measures would be made through the existing factors at 40% by FSM eligibility and 60% by IDACI score.

QUESTION 4

There are many different ways to measure deprivation and different levels of significance can be placed on each one. The BF Funding Formula currently allocates £2.073m, 3.47% of total funds to schools based on deprivation data. This is £0.319m below the amount that would have been distributed if the rate had been set at 4.00%, the average proportion of funds allocated by our statistical neighbours. Do you think the current BF allocation proportion is:

About Right Too low Too high No view

Pupil Mobility

54. DfE will be changing the allowable method to distribute funds to schools for pupil mobility so that from April 2014, rather than paying a per-pupil amount for all in-year admissions taken into schools, a 10% threshold on "pupil turnover" will be applied to the mobility factor so that it will only support schools which experience a significant change in pupil numbers, with funding allocated only to the number of pupils above the 10% threshold and not all in-year admissions in qualifying schools. This is much closer to how pupil mobility previously operated in BF.
55. This change is being made because the existing method is considered to spread funding thinly across a large number of schools and does not target funding to those

⁵ IMD identifies the most deprived areas across the country. They combine a number of indicators, chosen to cover a range of economic, social and housing issues, into a single deprivation score for each small area in England.

schools which most need additional support. For BF, it was agreed that only primary schools would have a mobility factor, with £0.016m allocated in 2013-14 to all 31 primary schools. Applying the 10% threshold would have resulted in only six schools receiving an allocation. Using October 2012 census data, no secondary schools qualify for mobility funding based on the new 10% threshold.

56. In changing the eligibility criteria, the same funding issue needs to be resolved on the pupil mobility factor as was faced on prior attainment at Key Stage 2 although in this instance there is a reduction in funds allocated. It is proposed to manage the budget saving in the same way by recalculating the amount of per-pupil funding paid for each eligible pupil by dividing the new, lower number of eligible pupils into the total initial 2013-14 budget. This cash limits the amount of funds allocated to the current level and is therefore cost neutral. It will result in a higher per-pupil funding rate.

QUESTION 5 – PRIMARY SCHOOLS ONLY

Do you agree that the best way to incorporate the reduced eligibility criteria that will be used next year for funding primary schools for high levels of pupil mobility is to increase the amount of per-pupil funding to a level that ensures the total amount of funds allocated remains unchanged from that allocated in 2013-14 i.e. £0.016m?

57. Appendix 7 shows the impact that the new allocation methodology produces.

Sparsity

58. DfE has indicated that one of the most common concerns raised from the funding reforms is the impact in rural areas and particularly the viability of small schools. To address this issue, an optional sparsity factor will be available to LAs from April 2014 of which the minimum criteria will be:
- For primary schools, fewer than 150 pupils and an average distance (as the crow flies) greater than or equal to 2 miles
 - For secondary. Middle or all through schools, fewer than 600 pupils and an average distance (as the crow flies) greater than or equal to 3 miles
59. For the first year of operation, LAs may reduce the pupil numbers and distance criteria but not increase them.
60. Based on October 2012 data, no schools in BF would qualify for this factor as the smallest primary school had 163 pupils, and the smallest secondary 718 and therefore this new factor is not relevant to BF.

Lump Sum Allocations

61. In 2013-14, LAs were permitted to pay a uniform lump sum allocation to **all** schools up to a maximum of £200k with the amount in BF set at £150k for both primary and secondary schools. This was the maximum affordable in the primary phase, although a much larger value would have been possible for secondary schools. The view of the DfE is that the main purpose of the lump sum is to provide sufficient funding to

necessarily small schools which could not operate on the basis of per-pupil funding alone.

62. For April 2014, the maximum allowable lump sum will be reduced to £175k which is the average amount allocated in 2013-14. The reduction from £200k supports the DfE objective of more money being distributed through pupil-led factors. Differential lump sum payments for primary and secondary schools will also now be permitted. In considering the merits for change, the work undertaken last year for the previous round of changes remains valid and is set out below, but updated where appropriate.
63. A number of Formula Factors were previously used to allocate fixed lump sum payments to schools, some of which were limited only to schools meeting certain conditions, with others paid to all. These were:
- i. A standard rate for each school type (4 different values), to reflect the fact that all schools face an element of fixed costs that do not vary with pupil numbers and this is particularly important for small schools i.e. 1 form of entry primary schools
 - ii. An allocation to secondary schools maintaining a Learning Support Unit which is intended to reduce the number of pupil exclusions, based on the four schools with the highest levels of pupil eligibility to a FSM.
 - iii. Schools undertaking their own admissions appeals (voluntary aided schools) receive funding to reflect the costs directly incurred.
 - iv. A unique cash value for each school to reflect funding previously received through education related grants, such as the Standards Fund. This amount had been frozen at the amount allocated at April 2009, which reflected the circumstances faced by each school at that time, in relation to the prevailing DfE funding priorities.
64. Aggregate funding from the above factors ranged from £122k to £307k in primary schools and from £560k to £828k in secondary schools. Moving to the newly agreed £150k amount required a significant amount of funding – approximately £3m - to be distributed through alternative measures at April 2013.
65. Neither the DfE nor BFC have undertaken any detailed work to establish the amount of lump sum funding that should be paid to ensure necessarily small schools can continue to operate in a funding system geared towards per-pupil funding.
66. Recent experience in BF demonstrates that the smallest primary schools in the borough tend to face the greatest difficulty in balancing their budgets. This is particularly apparent in 1 form of entry schools with average class sizes below 25, as there is limited scope to manage relative high costs per class. Of the five schools in receipt of a licensed budget deficit within the last three years, three have been 1 form entry primary schools.
67. In 2013-14, at 9.28%, the proportion of funds allocated through the BF Funding Formula was in the bottom half for the statistical neighbour grouping (9th out of 11) but in the top half for all of England (52nd out of 151). Schools are now being asked to consider whether this is the right proportion, with the median rate in the statistical neighbour group being 9.90%. Funding at a proportion of 9.90% would distribute an additional £0.372m, and £5.992m in total. This would deliver an average payment to all schools of £160,054.

68. Appendix 8 (a) to (c) models by school of the potential impact from making fixed lump sum payments of £160k, £170k and £175k compared to the current amount of £150k. Increasing the payments costs £310k, £620k and £775k respectively in the primary sector and £60k, £120k and £150k respectively in the secondary sector. The calculation has been made on the assumption that the increase would be financed from a corresponding reduction in per-pupil funding.

QUESTION 6

The BF Funding Formula currently allocates £5.620m, 9.28% of total funds, to schools through a fixed lump sum allocation. This is £0.372m below the amount that would have been distributed if the rate had been set at 9.90%, the average proportion of funds allocated by our statistical neighbours. Do you think the current BF allocation proportion is:

About Right Too low Too high No view

QUESTION 7

If you think that the lump sum payment should be increased, what value do you think it should be set at?

Around £160,000 **Around £170,000** **Around £175,000**
(Average for statistical neighbours) (Average all LAs)

Additional delegation

69. The new funding arrangements also require all LAs to delegate funding for the same services and functions, with a general presumption of additional delegation. However, where relevant representatives on a Schools Forum agree that the whole budget for their phase e.g. primary/secondary, should be returned to the Council for central management, this is allowed. This recognises that there are reasons of cost effectiveness, ease of organisation and management or risk sharing that a strategic approach can bring. The DfE term this approach “de-delegation”.
70. Overall, around £0.843m of funding is involved across the services, as set out in Table 1 below. All schools responding to last year’s consultation supported de-delegation and the return of budgets to the council for central management.

Table 1: Services subject to de-delegation again at April 2014

Ref	Item	£k	Allocation basis
A	Support to schools in financial difficulty	280	Amount per pupil
B	Support to underperforming ethnic minority and bi-lingual pupils	127	Amount per EAL pupil
C	SIMS and other licences	90	Amount per pupil
D	Staff supply cover for official absences *	345	Amount per pupil
	Total	843	

* includes maternity leave, trades union, magistrates and jury duties, council membership and staff suspensions.

71. Whilst the Council accepts that schools should have a choice over whether services should be delegated or not, with the option to de-delegate if supported by relevant representatives on the Schools Forum, there are a number of services that for reasons of cost effectiveness, ease of organisation and management or risk sharing that a strategic approach should be taken. This ensures a collective responsibility to support all schools, sometimes on services that are used infrequently, but often when they are required, significant costs are involved or where central procurement delivers significant cost benefits. All of the budget items in Table 1 above fall within these categories.
72. In particular, funding held in contingencies to support schools in financial difficulty is not considered suitable for delegation to individual schools. This is because this funding stream is targeted to specific schools facing real cost increases, which are generally substantial amounts, and it is not therefore appropriate to be included in the general funding of all schools.
73. Funding for schools in financial difficulties is primarily allocated where a school is in, or at risk of entering an Ofsted category, which ordinarily then requires financial support to put in place changes that will aid a rapid improvement and removal from the category.
74. Moving these funds directly into individual school budgets would take away the ability of the Council, in consultation with the Schools Forum, to provide financial support to schools that face the most challenging financial circumstances. It would place the onus on individual schools to retain sufficient balances to finance the additional costs which generally arise on an unpredictable basis. There would not be a facility to request funding from centrally managed School Budgets.
75. In reviewing the latest guidance from the DfE on de-delegation, it has become apparent that further budgets fall into this category, and which also need to be targeted to a small number of schools only and are not therefore considered suitable for delegation. This relates to premature retirement / dismissal costs of school staff and additional financial support to new, amalgamating or closing schools.
76. There is currently a £0.052m centrally managed budget to cover premature retirement / dismissal costs in schools which is administered in line with the policy agreed by the Schools Forum following consultation with schools and which is set out in the Scheme for Financing Schools⁶. This budget is used to meet the significant one-off redundancy costs that arise when schools need to undertake staffing re-organisations which are irregular in nature and often involve significant costs. This also covers the costs where employees are entitled to a redundancy payment at the end of a fixed term contract. DfE will not allow this budget to fund decisions taken after April 2013 and in order to be able to continue to target financial support to relevant schools, it is proposed to transfer the £0.052m funding into delegated school budgets, on a per-pupil basis, and then de-delegate for central management so funding top-ups can be passed on in-year to only those schools actually facing premature retirement / dismissal costs.
77. There is also £0.110m in the centrally managed school specific contingency to fund additional financial support to new, amalgamating or closing schools and to meet

⁶ All LAs must produce a Scheme for Financing Schools to set out the framework of financial and related functions that schools must comply with. The content of the Scheme must be consistent with statutory guidance issued by the DfE but can be changed in many areas to reflect local circumstances, if agreed by the Schools Forum.

exceptional unforeseen costs in primary schools. The majority of this budget - £0.100m - has been established exclusively to be paid in-year to Jennett's Park Primary school as it moves from a 1 FE school to a 2 FE school from September 2013, at which point there will be a consequential increase in cost base that is not recognised in the initial 2013-14 budget. The remaining £0.010m has been retained to support primary schools facing exceptional, unforeseen costs. The correct way to record this funding is as a de-delegated item, and it is therefore proposed to include the £0.110m funding within delegated school budgets, on a per-pupil basis to primary schools only, and then de-delegate for central management so funding top-ups can be passed on to Jennett's Park Primary school and other qualifying schools. The amount required in this budget will be reviewed during the course of setting the 2014-15 budgets and is expected to be reduced.

78. There is one further change proposed to funding in respect of de-delegation of budgets and this relates to the costs of undertaking FEM eligibility checks. Schools will be aware of the importance of maximising numbers of pupils eligible to FSM for funding purposes in both the BF Funding Formula and the Pupil Premium. Whilst a separate budget for this work was not in place for 2013-14, there has been a considerable amount of work undertaken by the LA to provide schools with more accurate and up to date information on pupil eligibility. The most significant improvement relates to linking the Council's Housing Benefits system to the FSM application process. This means that as soon as a parent receives the relevant benefits, schools are informed to update their census to maximise income and parents receive a letter informing them of their child's eligibility to a FSM.
79. This work has a relatively low cost compared to the additional income identified for schools with costs associated with the licence fee charged by the software provider for data analysis with Housing Benefits and some associated staff time. Overall costs are not expected to exceed £0.020m, and once fully calculated, it is proposed that from April 2014 these are funded from a new de-delegated budget.

Table 2 below summarises the newly classified de-delegation budgets.

Table 2: Newly classified de-delegated budgets

Ref	Item	£k	Allocation basis
E	Premature retirement / dismissal costs	52	Amount per pupil
F	Additional financial support to new, amalgamating or closing schools, plus exceptional costs in primary schools	110	Amount per primary aged pupil
G	Free school meals eligibility checking	20	Amount per pupil eligible to a FSM
Total		182	

Appendix 9 provides an outline of the services proposed to be de-delegated and indicative funding allocations to individual schools. i.e. Table 1 and Table 2 items.

80. In addition to the strategic services set out above, there is also an onus on delegation of behaviour related services, and it was agreed last year that these would be de-delegated for 2013-14 only, and then included in school budgets, with the council offering a traded service for schools to purchase through Service Level Agreements (SLAs) if they wished. Relevant services are set out below in Table 3.

Table 3: Services subject to delegation for the first time in April 2014

Ref	Item	£k	Allocation basis
Behaviour Related Services			
H	Consistency Management & Cooperative Discipline (CMCD®)	32	Amount per secondary aged pupil
I	Behaviour and Education Support Team	292	65% by amount per pupil, 15% by deprivation and 20% by prior attainment
J	Anti-bullying co-ordinator	25	Amount per pupil
K	Social and Emotional Aspects of Learning	71	Amount per primary aged pupil
Total		421	

81. The CMCD programme was a time-limited scheme in three secondary schools to improve the quality of teaching and learning. It is proposed that these funds are now delegated to all secondary schools, without the LA offering an SLA. Support for behaviour support, anti-bullying and the social and emotional aspects of learning (SEAL) and will be offered to schools through new SLAs.
82. Appendix 10 sets out a description of each of the newly delegated services and a funding allocation which is based on the distribution methodology preferred by the majority of schools that responded to the 2012 financial consultation when this question was asked. Formal SLAs will be developed during the autumn term for schools to consider.

QUESTION 8

To continue the strategic and cost effective approach in the use of the funds for contingencies (including schools in financial difficulties), support to underperforming ethnic groups, licences / subscriptions and staff supply cover costs, do you agree that the Schools Forum should again agree to de-delegate all relevant funding for continued central management by the LA? See Table 1 and Appendix 9.

QUESTION 9

Three new budgets have been identified as needing to be subject to de-delegation. In order to continue the strategic and cost effective approach, do you agree that the £0.052m funds for premature retirement / dismissal cost, the £0.110m to support new, amalgamating or closing schools / exceptional costs and £0.020m to perform checks on pupil eligibility to a free school meal should be allocated to schools on a per pupil / FSM eligibility basis and then be de-delegated, with relevant funding returned to the council for central management? See Table 2 and Appendix 9.

QUESTION 10

Do you agree that budgets for behaviour related support services should be delegated to schools based on the majority responses received from schools to the 2012 financial consultation?

Summary potential impact from changes

83. Appendix 11 shows the aggregate impact on individual school budgets, should the changes set out above be agreed, and funding distributed through low prior attainment, deprivation measures and fixed lump sum allocations moved to the average proportion used by our statistical neighbours by reducing per-pupil funding allocations. This summary uses 2013-14 budget data so will be subject to update in 2014-15. It also applies the overall impact of the MFG and the cap applied to schools gaining funds from all the possible changes.
84. In terms of the MFG calculation, schools will be aware that whatever the outcomes of the operation of the local Funding Formula, per pupil funding can reduce by no more than 1.5% each year. This means that all things being equal, where relevant, the amount of MFG relevant schools receive each year will reduce by up to 1.5% of per pupil funding. Therefore, even if no changes are made at April 2014, schools receiving MFG top up in 2013-14 will receive less financial support in 2014-15, and those contributing to the cost would retain more of their gain. Appendix 11 summarises the financial impact arising from the exemplifications shown from Appendix 4 to 8. It also displays the recalculated MFG top up and deduction to budget where there is an increase in funds, and the net overall change.
85. Whilst the level of funding protection for 2014-15 has been confirmed at the same 1.5% maximum reduction in per-pupil fund as applies in 2013-14, it is unclear what arrangements will be put in place from 2015-16, although the DfE have confirmed that protection will continue. However, as protection will eventually be phased out, it is important that the right decisions on the distribution of school funding are taken now as their impact may be more significant in the medium to longer term.
86. Reducing the amount of funds allocated through per-pupil factors to finance increases in other factors would result in a per-pupil funding rate of £2,798 in primary schools (was £2,849 down 1.8%) and £4,030 in secondary schools (was £4,080 down 1.3%). The overall percentage allocated through pupil funding would be 79% (was 81%).

Interpretation of financial exemplifications

87. Whilst financial exemplifications are provided at individual school level to illustrate the potential impact of the various options, it is important to remember that all figures relate to restating the original 2013-14 budget to the new options. All figures are subject to change at the October 2013 census, such as actual pupil numbers, FSM eligibility etc. so should be viewed with caution **and schools are advised to consider the merits of the principle behind each possible change and not just the indicative financial effect.** The main variables at this stage are:
1. Data used to calculate school budgets must be that provided by the DfE. Not all data sets are available, such as prior attainment data.
 2. Calculations are being made against October 2012 census data. It will be subject to update from the October 2013 census, as this will determine 2014-15 budgets. Significant changes could arise from this.
 3. In order to present an illustration of the potential overall impact, some assumptions have had to be made on the decisions that will be taken. For example, that funds allocated through low prior attainment, deprivation and the fixed lump sum allocation will be set at the average (median) percentage used by our statistical neighbours, and the resultant increases will be funded

by reducing the age weighted pupil units.

88. It is also important to note that the exemplifications in Appendices 4 – 10 are before applying the Minimum Funding Guarantee (MFG) which will limit the losses that a school can experience to 1.5% per-pupil. It also excludes the impact of any capping that may need to be applied to schools gaining in order to finance the cost of protecting the losers. These calculations have been added at Appendix 11.
89. The budget figures used exclude the items that have been de-delegated. This means the amounts quoted in the appendices agree with the budget notification schools received from the Council, but the overall totals will not reconcile with the amounts quoted at Appendix 2, the summary LA Funding Formula. This is because Appendix 2 is a standard form all LAs need to submit to the DfE, so for consistency, needs to be completed on the same basis, which is to assume that no funds are de-delegated.

Schools Forums

90. The DfE requires Forums to operate transparently and fairly, which has always been the model adopted in BF and is recognised to be the case in the vast majority of LAs. One area of change that will be required by the DfE is that Forums must include one elected representative from an institution (other than from a school or academy) providing education beyond 16 (but may also be providing education for 14-16 year olds). This will replace the current requirement for a representative from the 14-19 partnership which is currently met in BF through secondary headteacher representatives.
91. This change has been made to allow institutions providing education for students between 14 and 25 (such as further education colleges) that have an interest in local high needs funding and funding for pupils who are educated in further education provision from age 14 to have an input to the decision making process.

High Needs Funding in mainstream schools

92. The new arrangements, with LAs “strongly recommended” to set a threshold of £6,000 before schools could request additional financial support for pupils with SEN has resulted in additional funds being added into the general budgets of schools in many areas, with £1.031m being moved in BF via per-pupil, prior attainment and deprivation measures. This change is probably the primary concern for schools in BF due to now having to manage up to a further £4,180 of pupil support needs from funds that are now allocated through a formulaic approach rather than targeted to named pupils. This introduces greater uncertainty in budget planning and cost control.
93. For 2014-15, LAs will be required to adopt this threshold which will replace the £6,080 threshold used in BF. This slightly higher rate was adopted in order to match to the closest unit of resource in the SEN funding model (Needs Weighted Pupil Unit or NWPU). As the £1.031m budget transfer into the Funding Formula was calculated from the amount of money being spent on the support needs of pupils up to £6,080, general school budgets are resourced to a greater value than required. No change is therefore proposed to be made as a result of the new £6,000 threshold which means there will be no adverse financial impact on schools.
94. The DfE considered adding an additional factor to the allowable list to reflect significant numbers of high needs pupils in a school as the move to a formulaic approach to fund schools for SEN pupils, rather than on the basis of assessed need

of individual pupils can mean that some schools are not receiving sufficient funds to support SEN pupils. On balance, the DfE has determined that more time is needed to consider how such a factor would work in practice.

95. It should also be noted that if such a factor is introduced, it would only reflect the incidence of pupils with support needs above the £6,000 and would not recognise schools with a high incidence of pupils with SEN up to £6,000. The DfE will continue to allow funds from the High Needs Block to be used to support schools with significant numbers of high needs pupils outside the Funding Formula. Where such an approach is adopted, the distribution criteria must be agreed in advance on the basis of experience in 2013-14 and be expressed as a formula that “minimises perverse incentives” i.e. does not encourage schools to take a specific course of action with the intention of gaining additional funds.
96. For 2013-14, the Forum agreed not to create a fund in the High Needs Block to support mainstream schools on the basis that:
 - i. Funding protection for the redistribution of SEN related budgets for support needs up to £6,000 was provided by the MFG;
 - ii. Top up funding paid to schools above the £6,000 threshold for high needs pupils is excluded from the MFG so schools receive all of the additional funds. The top up is calculated on the assessed cost of needs, so schools should be fully resourced for the extra costs.

However, the Forum recognises that there are other issues to consider, including the impact of large numbers of high needs pupils in a school and that the alternative may be a more expensive out of borough placement with travel disruption for pupils. It is therefore appropriate to review this for 2014-15 in the light of actual experience.

97. Assuming that such a fund should be created, there are two key issues to resolve: how much money should be included in the fund; and what the allocation criteria to receive top up funding should be.
98. Using the detailed work undertaken to support the changes made to school funding from April 2013, it was established that three schools were subject to a significant reduction in SEN funding from the reforms at an aggregate loss of £190k. This amount is before taking account of the funding protection provided through the MFG so in all likelihood, would be reduced. It is not appropriate to look at the impact of the MFG from one change in the Funding Formula as losses experienced against one change can be offset by gains in others with the total overall impact the most important factor. Therefore, it seems appropriate to make an assumption on the impact of the MFG in terms of the funding protection it provides to schools from changes in the SEN elements of the reforms and also the amount of extra funds that it would be appropriate to make available. At this stage, it is assumed that 50% of the £190k loss of funding set out above would be included in such a fund. This implies the budget for the SEN top up fund should be set at around £100k.
99. In terms of eligibility criteria where such an approach is adopted, as set out above, the distribution criteria must be agreed in advance on the basis of experience in 2013-14 and be expressed as a formula that “minimises perverse incentives”. The DfE does not provide guidance as to what constitutes suitable criteria but have informally indicated that the following would be acceptable:

- i. Where the proportion of pupils on roll classified as high need exceeds an agreed percentage of total pupil numbers i.e. those with support needs above £6,000.
 - ii. Where the proportion that top up funding paid to support High Needs pupils compared to the total budget allocated via the BF Funding Formula exceeds an agreed percentage.
100. Appendix 12 displays the relevant data by school included in the initial 2013-14 budget. In order to target resources to the schools with the most significant results against the criteria, it would seem appropriate to set the funding thresholds at 4% for the proportion of pupils classified as high needs in primary schools, and 2% for secondary schools, with the proportion of funding that high needs pupils represent set at 2% for primary schools and 1% for secondary schools. Using these thresholds indicates that 5 schools – 14% of all schools – would qualify for top up funding.
101. In terms of how much top up funding qualifying schools should receive, it is proposed to divide the total agreed budget by the number of high needs pupils in qualifying schools to set a per-pupil amount which would then be the unit of resource thereafter. Assuming a budget of £100k is agreed for such a fund, the 92.5 high needs pupils in qualifying schools would be divided into the total budget to produce a per-pupil allocation of around £1,100. Appendix 12 also shows the qualifying schools and the additional funding they would receive in 2014-15, based on the above assumptions.

QUESTION 11

Do you agree, that subject to sufficient finances being available, that the Schools Forum should establish a budget in the High Needs Block to support schools that meet qualifying criteria in respect of the number of high needs pupils on roll?

QUESTION 12

If a budget is established in the High Needs Block to support schools with a disproportionate number of high needs pupils, what do you think the amount should be?

**No more than £50,000 Between £50k and £100k Greater than £100k
(please specify amount)**

QUESTION 13

If a budget is established in the High Needs Block to support schools with a disproportionate number of high needs pupils, do you agree that subject to agreement of the DfE, the qualifying criteria should comprise the following:

- i. **The proportion of pupils on roll classified as high need exceeds 4% of total pupil numbers in a primary school and 2% in a secondary school i.e. those with support needs above £6,000?**
- ii. **The proportion that top up funding paid to support High Needs pupils represents compared to the total budget allocated via the BF Funding Formula exceeds 2% in a primary school and 1% in a secondary school?**

Other matters

Revisions to the Scheme for Financing Schools

102. Each LA is required to publish a Scheme for Financing Schools (the “Scheme”). This sets out the financial relationship between the LA and the maintained schools which it funds. It is a legally binding document on both the LA and schools relating to financial management and associated issues.
103. The DfE issues statutory guidance to LAs in respect of minimum content of Schemes. Parts of Schemes must be in accordance with “directed scheme revisions” and are mandatory, for other elements of schemes, there is discretion to make changes to reflect local circumstances. The statutory power to update discretionary parts of Schemes rests with maintained school representatives on the Schools Forum, but changes can only be made after a consultation with all governing bodies and head teachers.
104. Two changes are now proposed in respect to the BF Scheme for Financing Schools.

Policy for funding school redundancies

105. As set out above, funding provision for premature retirement / dismissal costs should in future be accounted for as a de-delegated budget and not one held centrally by the LA and a change is proposed for 2014-15. This will require a consequential change to the funding policy. There is no material change in how the scheme will operate, but the wording has been updated with changes clearly identified in Appendix 13 which schools are asked to support.

QUESTION 14

Do you agree that the wording in the existing premature retirement / dismissal funding policy should be updated as set out in Appendix 13?

Responsibility for repair and maintenance

106. Following consultation with schools, the Forum agreed that where the LA undertakes capital maintenance works in a school, the school would contribute 10% of the cost from its Devolved Formula Capital, up to a maximum of 75% of annual income. A change to the existing text is now proposed to make clear that contributions need to be made in the year that works are undertaken. The wording has been updated with changes clearly identified in Appendix 14, which schools are asked to support.

QUESTION 15

Do you agree that the wording relating to responsibility to repair and maintenance should be updated to make clear that financial contributions to schemes due from schools need to be paid in the year that work is completed? The full proposed text is set out in Appendix 14.

Lessons to be learnt from the composition of LA Funding Formulas in 2013-14

107. As would be expected, there is a wide range of proportions allocated through the allowable factors of Funding Formulas by LAs which mainly reflects the different circumstances and priorities found across the country.
108. The amounts allocated through each factor by BF compared to the statistical neighbours and all England in the summary information of LA Funding Formulas (see Appendix 3 of the consultation document) are broadly in line with expectations. The one exception to this relates to rates, where at 2.26% of funds allocated, BF has the highest proportionate spend of the statistical neighbours, where the average rate is 1.31%, and the second highest in all England, where the average is 1.21%.
109. Part of the reason for the high proportional amount of spend relates to the small number of academy schools in BF as academy schools are treated as charities and therefore receive an 80% rebate on their rates bill. An analysis of rates bills for schools in Berkshire shows average spend of 1.47% based on actual cost of rates, which increases to 2.03% if all schools paid full rates liabilities. The rate for BF would increase to 2.51%.
110. The other main factor that accounts for the relative high cost of rates in BF is the impact of the rebuild at Garth Hill. This change resulted in the rates liability increasing by £0.205m. If the old rates liability is used, then the BF proportion of spend would be at 2.16%, just above the area average of 2.03%.
111. Other factors impact on rates liability such as regional characteristics and the size and age of buildings. More work is being undertaken in this area, including surveying other LAs for more data and advice has also been requested from the Council's Corporate Property Team.

Budget pressures and developments

112. Whilst it is unclear to what extent there will be new funds available to consider financing budget pressures or new developments in 2014-15, schools are being asked now if there are any items that the Schools Forum should consider when budget decisions are taken.
113. The new Funding Framework required a change to the way that the budget is set, with a more simplistic, high level approach needing to be adopted. This mainly arises from the tight financial settlements being made by the government and the restricted number of allowable factors which limits the ability to selectively target resources only to those schools facing cost pressures. Therefore, the following key principles, listed in priority order, are used by the Schools Forum as a guide in making budget proposals:
 - i. It has been included in the financial settlement from the DfE and it is consistent with local funding priorities;
 - ii. It relates to a new or amended statutory responsibility / DfE Regulation;
 - iii. There is sufficient income to fully fund changes in pupil characteristics, i.e: changes in pupil deprivation, low prior attainment, number of looked after children, English as an additional language and mobility;

- iv. The pressure relates to a key local priority;
- v. Any remaining funds should be allocated using per-pupil, high deprivation and low prior attainment data, in the same proportion as the distribution of funds at the start of the financial year (around 93.6%/3.1%/3.3% in primary and 90.7%/4.6%/4.7% in secondary). If sufficient funding remains for this principle, schools would then be free to deploy the resources to their key priorities and any school specific pressures.

114. Whilst there may be limited opportunities to consider budget pressures, the Forum is still interested to know to what extent there is a funding gap for schools between what needs to be spent and the amount of resources made available from the DfE.

QUESTION 16

Are you aware of any areas of budget pressure or areas of new development that you would like to be added to school budgets, subject to sufficient funds being available?

Any other matters on Education Funding?

115. This document asks questions on the issues considered the most important by the Schools Forum. Are there any other matters on education funding that you would like to raise?

QUESTION 17

Would you like to change any other matters on education funding in BF?

Next Steps

Results of Consultation

116. The results of this consultation, including all comments made by schools, will be considered by the Schools Forum on 5 December, as part of the budget setting process. The Schools Forum will need to take a strategic approach in setting the budget, including taking account of the overall level of resources.

Evening briefing for head teachers and governors

117. This consultation will be supported by an evening briefing on 15 October. The session will commence at 7.00 pm and be held at the Education Centre (Donnington Room) and will explain the key issues raised and the potential implications. The session will address each question on the consultation and provide an opportunity for attendees to raise questions. The intended audience is governors. Head teachers and bursars will receive briefings through the normal half termly meetings.

118. If you intend to attend the session, please can you confirm to:

education.finance@bracknell-forest.gov.uk

Indicative budgets for 2014-15

119. As in previous years, the LA intends to provide all schools with an indicative budget for next year, and this is planned as usual to be in schools by the end of the autumn term. These allocations should be seen as a guide and not a guarantee to future funding and will be subject to change once the data set to be used is made available by the DfE and final budget decisions are taken.

Contact for queries

120. Should you have any queries on this consultation, please contact:

Paul Clark, Head of Departmental Finance
Telephone 01344 354054
Email: paul.clark@bracknell-forest.gov.uk

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Allowable factors for LA Funding Formulas - April 2014

The simplification of the Funding Formula means that from the 'Schools Block' only the following 13 options are available to distribute funding to schools for the items subject to delegation, of which on 1 - 8 are relevant to BFC.

Factors that are relevant to BFC

1. A basic per-pupil entitlement – there will be a single unit for primary aged pupils and a single unit for each of key stage 3 and Key Stage 4.
2. Deprivation, measured by Free School Meals (FSM) and/or IDACI. There can be separate unit values for primary and secondary.
3. Looked after children.
4. Prior attainment as a proxy measure for SEN.
5. English as an additional language, for a maximum of 3 years after the pupil enters the school system. There can be separate unit values for primary and secondary.
6. Pupil mobility.
7. A standard lump sum for each school, with an upper limit of £175,000.
8. Rates, which must be at actual cost

Factors where BFC schools do not meet qualifying criteria:

9. Split sites
10. Private finance initiative (PFI) contracts
11. For the 5 local authorities who have some but not all of their schools within the London fringe area, an uplift to enable higher teacher pay scales in those schools to be reflected
12. Sparsity factor for small schools
13. A per-pupil factor which continues funding for post-16 pupils up to the level that the authority provided in 2012-13.

In addition to the factors listed above, one further funding stream is available to schools which is funded outside the 'Schools Block':

1. The Early Years Single Funding Formula that funds relevant schools for the free entitlement to early years education and childcare. No changes are proposed on this for 2014-15.

Summary of the BF Funding Formula used in 2013-14

Pupil Led Factors

	Reception Uplift		Number of Pupils		Sub Total (£)	Total (£)	Proportion of funding(%)	
	No	Amount (£) per pupil	Pupil Units					
1) Basic Entitlement Age Weighted Pupil Unit (AWPU)			0					
	Primary (including reception)	£2,849.01	9,002.0		£25,646,791.38	£48,443,516.99	42.87%	
	Key Stage 3	£4,080.32	3,331.0		£13,591,532.67		22.72%	
	Key Stage 4	£4,080.32	2,256.0		£9,205,192.95		15.39%	
47 2) Deprivation	Description	Primary amount per pupil (£)	Secondary amount per pupil (£)	Number of eligible primary pupils	Number of eligible secondary pupils	Sub Total (£)	Total (£)	Proportion of funding(%)
	Primary FSM	£425.12		893.5	0.0	£379,827.43	£2,073,474.38	3.47%
	Secondary FSM		£1,156.72	0.0	415.8	£480,982.54		
	IDACI Score 0.2 - 0.25	£344.34	£961.77	1,226.3	632.4	£1,030,465.08		
	IDACI Score 0.25-0.3	£516.51	£1,442.66	130.2	70.1	£168,315.63		
	IDACI Score 0.3- 0.4	£688.68	£1,923.54	5.0	5.0	£13,001.11		
	IDACI Score 0.4-0.5	£860.85	£2,264.27	1.0	0.0	£882.59		
	IDACI Score 0.5-0.6	£978.63	£2,692.97	0.0	0.0	£0.00		
IDACI Score 0.6-1	£1,141.74	£3,141.80	0.0	0.0	£0.00			
		Amount (£) per pupil	Number of Pupils		Sub Total (£)	Total (£)	Proportion of funding(%)	
3) Looked After Children (LAC)	LAC_X_Mar11	£211.86	45.9		£9,714.29	£9,714.29	0.02%	
4) Low cost, high incidence SEN	LowAtt_%_PRI_78	£533.91	1,743.9		£931,071.01	£2,088,156.54	3.49%	
	Secondary pupils not achieving (KS2 level 4 English and Maths)	£2,152.74	537.5		£1,157,085.53			
5) English as an Additional Language (EAL)	EAL_3_PRI	£272.60	625.8		£170,587.41	£198,937.52	0.33%	
	EAL_3_SEC	£272.60	104.0		£28,350.11			
6) Mobility	Primary pupils starting school outside of normal entry dates	£23.95	666.4		£15,957.76	£15,957.76	0.03%	
	Secondary pupils starting school outside of normal entry dates	£0.00	255.9		£0.00			

Other Factors

Factor	Description	Total (£)	Proportion of funding(%)
7) Lump Sum	A lump sum of £150,000 per school for 37 schools	£5,550,000.00	9.28%
8) Fringe Payments	N/A	£0.00	0.00%
9) Split Sites	N/A	£0.00	0.00%
10) Rates	Estimated actual cost.	£1,353,495.00	2.26%
11) PFI funding	N/A	£0.00	0.00%
12) Sixth Form	N/A	£0.00	0.00%
13) Exceptional circumstances (can only be used with prior agreement of EFA)			
Circumstance		Total (£)	Proportion of funding(%)
Exceptional Circumstance 1	The Authority was granted approval by the EFA 12 September 2012 for Joint Use of Sports facilities to be excepted. This affects 2 secondary schools: Edgbarrow and Sandhurst.	£85,048.47	0.14%
Total Funding for Schools Block Formula (excluding MFG Funding Total) (£)			£59,818,300.96
14) Minimum Funding Guarantee <input type="checkbox"/> MFG is set at -1.5%, gains may be capped above a specific ceiling and/or scaled			
MFG Funding Total (before capping or scaling) (£)			£356,741.65
Capping Factor (%)	1.00%	Scaling Factor (%)	59.59%
Explanation as to how capping and/or scaling has been applied:			
All schools retain the first 1% of any gain, with the remainder of the gain scaled by 59.58794% which is the rate required to fund the cost of MFG.			
If capped and/or scaling applied: Total deduction (£)			-£356,741.75
TOTAL FUNDING FOR SCHOOLS BLOCK FORMULA (£)			£59,818,300.86
% DISTRIBUTED THROUGH BASIC ENTITLEMENT			80.98%
% Pupil Led Funding			88.32%
RETAINED FOR GROWTH (£)			£392,050.00
PRIMARY/SECONDARY RATIO			1: 1.32%

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Summary of Funding Formulas used by Statistical Neighbours in 2013-14

Local Authority (statistical neighbour)	Basic Entitlement Funding (per pupil)						Other Per Pupil Funding			
	Primary Amount Per Pupil	Primary Proportion of Funding	Key Stage 3 Amount per pupil	Key Stage 3 Proportion of Funding	Key Stage 4 Amount per pupil	Key Stage 4 Proportion of Funding	Deprivation Proportion of Funding	Looked after Children Proportion of Funding	SEN Proportion of Funding (low prior attainment)	EAL Proportion of Funding
Bracknell Forest	£2,849	42.9%	£4,080	22.7%	£4,080	15.4%	3.47%	0.02%	3.49%	0.33%
Buckinghamshire	£2,490	38.2%	£3,375	21.8%	£3,915	16.9%	6.24%	0.00%	5.43%	0.37%
Cambridgeshire	£2,447	38.8%	£3,434	20.6%	£4,464	18.7%	4.00%	0.05%	3.08%	1.00%
Central Bedfordshire	£2,908	43.2%	£4,170	23.5%	£4,879	18.9%	2.40%	0.00%	0.00%	0.00%
Cheshire East	£2,706	37.8%	£3,786	22.4%	£4,532	18.9%	3.40%	0.03%	5.98%	0.12%
Hampshire	£2,471	35.0%	£3,736	21.5%	£4,481	17.8%	4.73%	0.18%	4.85%	0.44%
Hertfordshire	£2,538	35.2%	£3,708	21.8%	£4,895	19.5%	5.90%	0.17%	1.73%	0.66%
Oxfordshire	£2,773	41.3%	£4,106	22.3%	£4,306	16.0%	4.44%	0.00%	4.20%	0.29%
Surrey	£2,579	38.0%	£3,445	19.5%	£4,373	16.8%	11.22%	0.05%	3.59%	0.38%
West Berkshire	£2,907	38.1%	£4,332	25.9%	£4,332	17.8%	3.32%	0.00%	3.30%	0.23%
Windsor and Maidenhead	£2,819	37.3%	£3,910	23.3%	£4,576	19.0%	2.71%	0.00%	6.66%	0.67%

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Statistical Neighbours:

Minimum	£2,447	35.0%	£3,375	19.5%	£3,915	15.4%	2.40%	0.00%	0.00%	0.00%
Maximum	£2,908	43.2%	£4,332	25.9%	£4,895	19.5%	11.22%	0.18%	6.66%	1.00%
Median (rank number 6)	£2,706	38.1%	£3,786	22.3%	£4,464	17.8%	4.00%	0.02%	3.59%	0.37%
BFC Rank (out of 11)	3	2	4	4	10	11	7	6	7	7
BFC cash allocation		£25,646,791		£13,591,533		£9,205,193	£2,073,474	£9,714	£2,088,157	£198,938

All England:

(excluding City of London):

Minimum	£2,122	26.3%	£3,178	13.2%	£3,414	8.6%	0.72%	0.00%	0.00%	0.00%
Maximum	£5,142	57.9%	£7,496	28.7%	£10,708	21.0%	24.82%	0.41%	9.41%	4.80%
Median (rank number 76)	£2,822	38.1%	£3,973	20.8%	£4,510	16.8%	7.85%	0.03%	3.89%	0.38%
BFC Rank (out of 151)	68	25	63	29	130	100	135	81	92	86

Local Authority (statistical neighbour)	Mobility Proportion of Funding	Lump Sum Fixed Sum per school	Lump Sum Proportion of Funding	London Fringe Proportion of Funding	Split Sites Proportion of Funding	Rates Proportion of Funding	Private Finance Initiative Proportion of Funding	Sixth Form Proportion of Funding	Exceptional Factors Proportion of Funding	Total	Total Funding	Memo Items:		
												Total Through Basic	Pupil Led Funding	Primary: Secondary Ratio
Bracknell Forest	0.03%	£150,000	9.28%	0.00%	0.00%	2.26%	0.00%	0.00%	0.14%	100.00%	£59,818,301	81%	88%	1.32
Buckinghamshire	0.00%	£113,145	9.40%	0.49%	0.01%	1.23%	0.00%	0.00%	0.01%	100.00%	£262,365,698	77%	89%	1.15
Cambridgeshire	0.00%	£150,000	12.35%	0.00%	0.00%	1.31%	0.05%	0.00%	0.00%	100.00%	£288,801,336	78%	86%	1.21
Central Bedfordshire	0.00%	£120,000	10.87%	0.00%	0.05%	1.01%	0.00%	0.00%	0.07%	100.00%	£142,908,725	86%	88%	1.18
Cheshire East	0.00%	£130,000	9.90%	0.00%	0.09%	1.44%	0.00%	0.00%	0.00%	100.00%	£190,483,785	79%	89%	1.26
Hampshire	0.17%	£190,000	13.78%	0.00%	0.01%	1.41%	0.00%	0.00%	0.04%	100.00%	£683,915,895	74%	85%	1.66
Hertfordshire	0.77%	£147,592	10.85%	1.28%	0.07%	1.44%	0.06%	0.45%	0.09%	100.00%	£651,704,298	77%	86%	1.33
Oxfordshire	0.07%	£120,000	9.84%	0.00%	0.04%	1.50%	0.00%	0.00%	0.02%	100.00%	£323,117,274	80%	89%	1.30
Surrey	0.00%	£135,000	8.71%	0.00%	0.09%	1.26%	0.00%	0.29%	0.03%	100.00%	£543,040,366	74%	90%	1.28
West Berkshire	0.00%	£125,733	10.20%	0.00%	0.00%	1.08%	0.00%	0.00%	0.00%	100.00%	£94,088,542	82%	89%	1.27
Windsor and Maidenhead	0.00%	£120,478	9.18%	0.00%	£0	1.18%	0.00%	0.00%	0.00%	100.00%	£76,129,928	80%	90%	1.26

Statistical Neighbours:

Minimum	0.00%	£113,145	8.71%	0.00%	0.00%	1.01%	0.00%	0.00%	0.00%	100.00%	£59,818,301	74%	85%	1.15
Maximum	0.77%	£190,000	13.78%	1.28%	0.09%	2.26%	0.06%	0.45%	0.14%	100.00%	£683,915,895	86%	90%	1.66
Median (rank number 6)	0.00%	£130,000	9.90%	0.00%	0.01%	1.31%	0.00%	0.00%	0.02%	100.00%	£262,365,698	79%	89%	1.27
BFC Rank (out of 11)	4	2	9	3	8	1	3	3	1	2	11	3	7	3
BFC cash allocation	£15,958		£5,550,000			£1,353,495			£85,048			£48,443,517	£52,813,800	

All England:

(excluding City of London):

Minimum	0.00%	£42,000	2.11%	0.00%	0.00%	0.45%	0.00%	0.00%	0.00%	100.00%	£2,514,447	61%	65%	0.00
Maximum	4.30%	£200,000	17.11%	1.28%	21.91%	2.68%	9.59%	1.30%	3.42%	100.00%	£809,832,006	87%	96%	1.66
Median (rank number 76)	0.00%	£125,570	8.02%	0.00%	0.04%	1.21%	0.02%	0.00%	0.00%	100.00%	£158,257,509	76%	90%	1.28
BFC Rank (out of 151)	60	33	52	6	108	2	78	17	17	15	146	19	113	45

Potential financial effect of allocating funds for low prior attainment at the average rate used by statistical neighbours

		Original 2013-14 Budget				Funding at Statistical average			Net Change in Funding			
	Primary funding rate	£2,849.01		£499.22		£513.92		-	£2.85			
	Secondary funding rate	£4,080.32		£2,128.61		£2,191.29		-	£6.03			
Ref	School	Total number on roll October 2012	Number of LPA pupils October 2012	Proportion of pupils classed as LPA	LPA funding	LPA Funding	Change in LPA Funding	Contribution from Headcount Funding	Amount	This Factor	Total Budget	Ref
1	Ascot Heath Infant	207	11.2	5.43%	£5,608	£5,773	£165	£589	£424	-7.57%	-0.06%	1
2	Ascot Heath Junior	239	27.0	11.30%	£13,488	£13,885	£397	£681	£283	-2.10%	-0.03%	2
3	Binfield Primary	416	22.8	5.49%	£11,391	£11,727	£335	£1,185	£849	-7.45%	-0.06%	3
4	Birch Hill Primary	373	68.9	18.47%	£34,390	£35,403	£1,013	£1,062	£50	-0.14%	0.00%	4
5	College Town Infant	221	24.0	10.87%	£11,992	£12,345	£353	£629	£276	-2.30%	-0.03%	5
6	College Town Junior	278	53.5	19.23%	£26,689	£27,475	£786	£792	£6	-0.02%	0.00%	6
7	Cranbourne Primary	198	22.6	11.40%	£11,272	£11,604	£332	£564	£232	-2.06%	-0.03%	7
8	Crown Wood Primary	379	55.4	14.62%	£27,667	£28,481	£815	£1,079	£265	-0.96%	-0.02%	8
9	Crowthorne Primary	209	42.9	20.51%	£21,402	£22,033	£630	£595	£35	0.16%	0.00%	9
10	Fox Hill Primary	181	46.9	25.93%	£23,426	£24,116	£690	£515	£174	0.74%	0.02%	10
11	Great Hollands Primary	314	107.7	34.30%	£53,771	£55,354	£1,583	£894	£689	1.28%	0.05%	11
12	Harmans Water Primary	624	222.2	35.61%	£110,938	£114,204	£3,266	£1,777	£1,490	1.34%	0.07%	12
13	Holly Spring Infant	258	51.9	20.12%	£25,917	£26,680	£763	£735	£28	0.11%	0.00%	13
14	Holly Spring Junior	227	65.5	28.85%	£32,689	£33,652	£963	£646	£316	0.97%	0.04%	14
15	Jennetts Park Primary	203	54.1	26.67%	£27,024	£27,820	£796	£578	£218	0.81%	0.03%	15
16	Meadow Vale Primary	474	73.7	15.56%	£36,809	£37,893	£1,084	£1,350	£266	-0.72%	-0.02%	16
17	New Scotland Hill Primary	206	10.7	5.17%	£5,319	£5,476	£157	£587	£430	-8.08%	-0.06%	17
18	Owismoor Primary	485	73.9	15.24%	£36,903	£37,990	£1,087	£1,381	£294	-0.80%	-0.02%	18
19	The Pines Primary	174	51.0	29.29%	£25,445	£26,194	£749	£495	£254	1.00%	0.03%	19
20	Sandy Lane Primary	587	191.7	32.65%	£95,687	£98,505	£2,817	£1,671	£1,146	1.20%	0.05%	20
21	St Joseph's Primary	210	23.3	11.11%	£11,648	£11,991	£343	£598	£255	-2.19%	-0.03%	21
22	St Margaret Clitherow Primary	201	51.1	25.44%	£25,526	£26,278	£752	£572	£179	0.70%	0.02%	22
23	St Michael's (East) Primary	242	15.9	6.57%	£7,937	£8,170	£234	£689	£455	-5.74%	-0.05%	23
24	St Michael's (Sand) Primary	212	11.0	5.17%	£5,474	£5,635	£161	£604	£442	-8.08%	-0.06%	24
25	Uplands Primary	208	15.7	7.56%	£7,853	£8,085	£231	£592	£361	-4.60%	-0.05%	25
26	Warfield Primary	204	40.1	19.64%	£20,004	£20,593	£589	£581	£8	0.04%	0.00%	26
27	Whitegrove Primary	446	37.2	8.33%	£18,554	£19,101	£546	£1,270	£724	-3.90%	-0.05%	27
28	Wildmoor Heath Primary	163	37.8	23.17%	£18,855	£19,410	£555	£464	£91	0.48%	0.01%	28
29	Wildridings Primary	340	124.8	36.71%	£62,318	£64,153	£1,835	£968	£867	1.39%	0.07%	29
30	Winkfield St Mary's Primary	208	34.1	16.38%	£17,008	£17,509	£501	£592	£91	-0.54%	-0.01%	30
31	Wooden Hill Primary	315	75.3	23.89%	£37,566	£38,672	£1,106	£897	£209	0.56%	0.02%	31
32	The Brakenhale	882	145.6	16.51%	£309,954	£319,080	£9,126	£5,318	£3,808	1.23%	0.09%	32
33	Easthampstead Park	718	96.9	13.49%	£206,169	£212,240	£6,070	£4,329	£1,741	0.84%	0.05%	33
34	Edgbarrow	1,013	61.2	6.04%	£130,337	£134,175	£3,838	£6,108	£2,270	-1.74%	-0.05%	34
35	Garth Hill College	1,306	139.2	10.66%	£296,353	£305,078	£8,726	£7,875	£851	0.29%	0.01%	35
36	Ranelagh	768	28.6	3.72%	£60,797	£62,587	£1,790	£4,631	£2,841	-4.67%	-0.08%	36
37	Sandhurst	900	66.0	7.33%	£140,503	£144,640	£4,137	£5,427	£1,290	-0.92%	-0.03%	37
Total Primary		9,002	1,744	18.41%	£870,573	£896,206	£25,633	£25,633	£0	0.00%	0.00%	
Total Secondary		5,587	537	9.63%	£1,144,114	£1,177,801	£33,687	£33,687	£0	0.00%	0.00%	
GRAND TOTAL		14,589	2,281	16.99%	£2,014,687	£2,074,007	£59,320	£59,320	£0	0.00%	0.00%	

Summary:

Primary Maximum increase.	£1,490	1.39%	0.07%
Primary Maximum reduction.	£849	-8.08%	-0.06%
Secondary Maximum increase.	£3,808	1.23%	0.09%
Secondary Maximum reduction.	£2,841	-4.67%	-0.08%

Potential financial effect from new low prior attainment data for secondary schools

		Original 2013-14 Budget				Revised Budget - new criteria			Net Change in Funding					
Secondary funding rate		£2,128.61				£828.68								
Ref	School	Total number on roll October 2012	Number of LPA pupils October 2012 current criteria	Proportion of pupils classed as LPA - current criteria	LPA funding	Number of LPA pupils October 2012 2014-15 criteria	Proportion of pupils classed as LPA - 2014-15 criteria	LPA Funding	Change in LPA funding	Contribution from Headcount Funding	Total	This Factor	Total Budget	Ref
32	The Brakenhale	882	145.6	16.51%	£309,987	344.5	39.06%	£285,478	£-24,510	£-5,318	£-29,828	-9.62%	£-0.67%	32
33	Easthampstead Park	718	96.9	13.49%	£206,194	251.2	34.99%	£208,203	£2,008	£-4,329	£-2,321	-1.13%	£-0.06%	33
34	Edgbarrow	1,013	61.2	6.04%	£130,355	182.6	18.03%	£151,332	£20,977	£-6,108	£14,869	11.41%	£0.32%	34
35	Garth Hill College	1,306	139.2	10.66%	£296,389	362.8	27.78%	£300,625	£4,237	£-7,874	£-3,637	-1.23%	£-0.06%	35
36	Ranelagh	768	28.6	3.72%	£60,666	89.9	11.71%	£74,512	£13,846	£-4,631	£9,215	15.19%	£0.26%	36
37	Sandhurst	900	66.0	7.33%	£140,522	190.2	21.14%	£157,651	£17,128	£-5,427	£11,701	8.33%	£0.28%	37
Total Secondary		5,587	537.5	9.63%	£1,144,114	1,421.3	25.45%	£1,177,801	£33,687	£-33,687	£0	3.82%	0.01%	

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Eligibility Criteria:

Currently, number of pupils not achieving Level 4 in English **and** maths.
 2014-15, number of pupils not achieving Level 4 in English **or** maths.

Summary:

Secondary Maximum increase. £14,869 15.19% 0.32%
 Secondary Maximum reduction. £-29,828 -9.62% -0.67%

Potential financial effect of allocating funds for deprivation at the average rate used by statistical neighbours

Ref	School	Original 2013-14 Budget				Funding at Statistical average				Net Change in Funding			Ref
		Number on roll October 2012	FSM Element	IDACI Element	Total Deprivation	FSM Element	IDACI Element	Change in Deprivation Funding	Headcount Funding Contribution	Amount	This Factor	Total Budget	
	Primary funding rate		£404.81	varies		£468.84	varies			£14.55			
	Secondary funding rate		£1,147.36	varies		£1,328.85	varies			£33.69			
1	Ascot Heath Infant	207	£3,238	£325	£3,564	£3,751	£377	£564	£3,013	£2,449	-0.42%	-0.33%	1
2	Ascot Heath Junior	239	£3,643	£0	£3,643	£4,220	£0	£576	£3,478	£2,902	-0.44%	-0.34%	2
3	Binfield Primary	416	£4,858	£6,182	£11,039	£5,626	£7,160	£1,746	£6,054	£4,308	-0.37%	-0.31%	3
4	Birch Hill Primary	373	£18,216	£5,546	£23,762	£21,098	£6,423	£3,759	£5,428	£1,670	-0.16%	-0.13%	4
5	College Town Infant	221	£7,287	£1,798	£9,084	£8,439	£2,082	£1,437	£3,216	£1,779	-0.29%	-0.22%	5
6	College Town Junior	278	£4,858	£813	£5,671	£5,626	£942	£897	£4,046	£3,149	-0.41%	-0.32%	6
7	Cranbourne Primary	198	£2,834	£0	£2,834	£3,282	£0	£448	£2,882	£2,433	-0.44%	-0.33%	7
8	Crown Wood Primary	379	£19,431	£14,680	£34,111	£22,504	£17,002	£5,395	£5,516	£120	-0.01%	-0.01%	8
9	Crowthorne Primary	209	£3,238	£1,308	£4,546	£3,751	£1,515	£719	£3,042	£2,323	-0.40%	-0.30%	9
10	Fox Hill Primary	181	£19,026	£3,926	£22,952	£22,036	£4,547	£3,630	£2,634	£996	0.19%	0.13%	10
11	Great Hollands Primary	314	£35,623	£76,784	£112,407	£41,258	£88,930	£17,780	£4,570	£13,210	1.34%	1.05%	11
12	Harmans Water Primary	624	£36,028	£44,320	£80,348	£41,727	£51,330	£12,709	£9,081	£3,628	0.20%	0.16%	12
13	Holly Spring Infant	258	£17,407	£8,394	£25,801	£20,160	£9,722	£4,081	£3,755	£326	0.04%	0.03%	13
14	Holly Spring Junior	227	£12,549	£5,556	£18,105	£14,534	£6,434	£2,864	£3,304	£440	-0.07%	-0.05%	14
15	Jennetts Park Primary	203	£17,002	£55,039	£72,042	£19,691	£63,745	£11,395	£2,954	£8,441	1.33%	1.03%	15
16	Meadow Vale Primary	474	£21,233	£57,516	£78,749	£24,591	£66,614	£12,456	£6,898	£5,558	0.40%	0.33%	16
17	New Scotland Hill Primary	206	£2,024	£488	£2,512	£2,344	£565	£397	£2,998	£2,601	-0.45%	-0.34%	17
18	Owlsmoor Primary	485	£12,549	£813	£13,363	£14,534	£942	£2,114	£7,058	£4,945	-0.36%	-0.30%	18
19	The Pines Primary	174	£18,216	£14,804	£33,020	£21,098	£17,145	£5,223	£2,532	£2,691	0.52%	0.36%	19
20	Sandy Lane Primary	587	£31,170	£42,947	£74,117	£36,101	£49,740	£11,724	£8,543	£3,181	0.19%	0.15%	20
21	St Joseph's Primary	210	£2,429	£14,221	£16,650	£2,813	£16,470	£2,634	£3,056	£423	-0.07%	-0.05%	21
22	St Margaret Clitherow Primary	201	£4,048	£18,965	£23,013	£4,688	£21,965	£3,640	£2,925	£715	0.12%	0.09%	22
23	St Michael's (East) Primary	242	£10,120	£8,622	£18,742	£11,721	£9,986	£2,965	£3,522	£557	-0.08%	-0.06%	23
24	St Michael's (Sand) Primary	212	£3,238	£1,301	£4,540	£3,751	£1,507	£718	£3,085	£2,367	-0.40%	-0.32%	24
25	Uplands Primary	208	£2,024	£0	£2,024	£2,344	£0	£320	£3,027	£2,707	-0.47%	-0.35%	25
26	Warfield Primary	204	£1,619	£1,627	£3,246	£1,875	£1,884	£513	£2,969	£2,455	-0.43%	-0.31%	26
27	Whitegrove Primary	446	£2,024	£1,627	£3,651	£2,344	£1,884	£577	£6,491	£5,913	-0.48%	-0.40%	27
28	Wildmoor Heath Primary	163	£4,048	£1,952	£6,000	£4,688	£2,261	£949	£2,372	£1,423	-0.31%	-0.21%	28
29	Wildridings Primary	340	£23,479	£26,268	£49,747	£27,193	£30,424	£7,869	£4,948	£2,921	0.29%	0.23%	29
30	Winkfield St Mary's Primary	208	£2,024	£0	£2,024	£2,344	£0	£320	£3,027	£2,707	-0.47%	-0.36%	30
31	Wooden Hill Primary	315	£16,192	£50,756	£66,948	£18,754	£58,784	£10,590	£4,584	£6,005	0.64%	0.51%	31
32	The Brakenhale	882	£133,094	£141,985	£275,079	£154,147	£164,444	£43,511	£29,718	£13,793	0.36%	0.31%	32
33	Easthampstead Park	718	£105,557	£272,258	£377,815	£122,254	£315,322	£59,761	£24,192	£35,569	1.09%	0.92%	33
34	Edgbarrow	1,013	£27,537	£21,963	£49,500	£31,892	£25,437	£7,830	£34,132	£26,302	-0.64%	-0.57%	34
35	Garth Hill College	1,306	£120,473	£213,210	£333,683	£139,529	£246,935	£52,781	£44,004	£8,776	0.16%	0.14%	35
36	Ranelagh	768	£20,440	£33,560	£53,999	£23,673	£38,868	£8,541	£25,877	£17,335	-0.55%	-0.49%	36
37	Sandhurst	900	£69,989	£30,050	£100,039	£81,060	£34,803	£15,824	£30,324	£14,501	-0.39%	-0.35%	37
Total Primary		9,002	£361,678	£466,578	£828,256	£418,887	£540,379	£131,010	£131,010	£0	0.00%	0.00%	
Total Secondary		5,587	£477,091	£713,025	£1,190,116	£552,555	£825,809	£188,248	£188,248	£0	0.00%	0.00%	
GRAND TOTAL		14,589	£838,768	£1,179,603	£2,018,371	£971,441	£1,366,188	£319,258	£319,258	£0	0.00%	0.00%	

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Summary:

Primary Maximum increase.	£13,210	1.34%	1.05%	Secondary Maximum increase.	£35,569	1.09%	0.92%
Primary Maximum reduction.	£5,913	-0.48%	-0.40%	Secondary Maximum reduction.	£26,302	-0.64%	-0.57%

Potential financial effect from new pupil mobility data for primary schools

Ref	School	Original 2013-14 Budget				Revised Budget - new criteria		Net Change in Funding			Ref
		Total number on roll October 2012	Mobility % provided from DfE dataset Oct 12	Number of Mobility pupils October 2012 - current criteria	Mobility funding	Number of Mobility pupils October 2012 - 2014-15 criteria	Mobility Funding	Amount	This Factor	Total Budget	
	Primary funding rate				£23.95		£314.75				
1	Ascot Heath Infant	207	2.90%	6.0	£144	0.0	£0	£-144	-100.00%	-0.02%	1
2	Ascot Heath Junior	239	1.67%	4.0	£96	0.0	£0	£-96	-100.00%	-0.01%	2
3	Binfield Primary	416	3.85%	16.0	£383	0.0	£0	£-383	-100.00%	-0.03%	3
4	Birch Hill Primary	373	4.02%	15.0	£359	0.0	£0	£-359	-100.00%	-0.03%	4
5	College Town Infant	221	7.69%	17.0	£407	0.0	£0	£-407	-100.00%	-0.05%	5
6	College Town Junior	278	7.19%	20.0	£479	0.0	£0	£-479	-100.00%	-0.05%	6
7	Cranbourne Primary	198	9.60%	19.0	£455	0.0	£0	£-455	-100.00%	-0.06%	7
8	Crown Wood Primary	379	11.35%	43.0	£1,030	5.1	£1,605	£576	55.90%	0.04%	8
9	Crowthorne Primary	209	6.70%	14.0	£335	0.0	£0	£-335	-100.00%	-0.04%	9
10	Fox Hill Primary	181	16.02%	29.0	£694	10.9	£3,431	£2,736	394.05%	0.34%	10
11	Great Hollands Primary	314	9.24%	29.0	£694	0.0	£0	£-694	-100.00%	-0.06%	11
12	Harmans Water Primary	624	8.17%	51.0	£1,221	0.0	£0	£-1,221	-100.00%	-0.06%	12
13	Holly Spring Infant	258	7.36%	19.0	£455	0.0	£0	£-455	-100.00%	-0.05%	13
14	Holly Spring Junior	227	6.17%	14.0	£335	0.0	£0	£-335	-100.00%	-0.04%	14
15	Jennetts Park Primary	203	12.81%	26.0	£623	5.7	£1,794	£1,171	188.17%	0.14%	15
16	Meadow Vale Primary	474	4.10%	19.4	£465	0.0	£0	£-465	-100.00%	-0.03%	16
17	New Scotland Hill Primary	206	4.85%	10.0	£239	0.0	£0	£-239	-100.00%	-0.03%	17
18	Owlsmoor Primary	485	4.95%	24.0	£575	0.0	£0	£-575	-100.00%	-0.03%	18
19	The Pines Primary	174	6.90%	12.0	£287	0.0	£0	£-287	-100.00%	-0.04%	19
20	Sandy Lane Primary	587	10.05%	59.0	£1,413	0.3	£94	£-1,318	-93.32%	-0.06%	20
21	St Joseph's Primary	210	4.29%	9.0	£216	0.0	£0	£-216	-100.00%	-0.03%	21
22	St Margaret Clitherow Primar	201	6.47%	13.0	£311	0.0	£0	£-311	-100.00%	-0.04%	22
23	St Michael's (East) Primary	242	5.79%	14.0	£335	0.0	£0	£-335	-100.00%	-0.04%	23
24	St Michael's (Sand) Primary	212	4.25%	9.0	£216	0.0	£0	£-216	-100.00%	-0.03%	24
25	Uplands Primary	208	8.17%	17.0	£407	0.0	£0	£-407	-100.00%	-0.05%	25
26	Warfield Primary	204	6.37%	13.0	£311	0.0	£0	£-311	-100.00%	-0.04%	26
27	Whitegrove Primary	446	6.50%	29.0	£694	0.0	£0	£-694	-100.00%	-0.05%	27
28	Wildmoor Heath Primary	163	14.11%	23.0	£551	6.7	£2,109	£1,558	282.91%	0.23%	28
29	Wildridings Primary	340	16.47%	56.0	£1,341	22.0	£6,924	£5,584	416.39%	0.44%	29
30	Winkfield St Mary's Primary	208	6.25%	13.0	£311	0.0	£0	£-311	-100.00%	-0.04%	30
31	Wooden Hill Primary	315	7.62%	24.0	£575	0.0	£0	£-575	-100.00%	-0.05%	31
Total Primary		9,002	7.48%	666.4	£15,958	51	£15,958	£0	-40.51%	0.00%	

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Eligibility Criteria:

Currently, All mobility with no threshold.
2014-15, for schools over 10% threshold - for each pupil over 10% threshold .

Summary:

Primary Maximum increase. £5,584 416.39% 0.44%
Primary Maximum reduction. -£1,318 -100.00% -0.06%

Potential financial effect from allocating lump sum payments of £160k

		Original 2013-14 Budget			Increase to £160K		Net Change in Funding		
		£150,000	£2,773.29		£160,000	-£34.44			
		£150,000	£4,008.52		£160,000	-£10.74			
Ref	School	Total number on roll October 2012	Original lump sum	Headcount Funding	Increase in Lump sum	Contribution from Headcount Funding	Amount	This Factor	Total Budget
1	Ascot Heath Infant	207	£150,000	£574,071	£10,000	-£7,128	£2,872	0.40%	0.38%
2	Ascot Heath Junior	239	£150,000	£662,817	£10,000	-£8,230	£1,770	0.22%	0.21%
3	Binfield Primary	416	£150,000	£1,153,689	£10,000	-£14,326	-£4,326	-0.33%	-0.32%
4	Birch Hill Primary	373	£150,000	£1,034,438	£10,000	-£12,845	-£2,845	-0.24%	-0.22%
5	College Town Infant	221	£150,000	£612,898	£10,000	-£7,611	£2,389	0.31%	0.30%
6	College Town Junior	278	£150,000	£770,975	£10,000	-£9,573	£427	0.05%	0.04%
7	Cranbourne Primary	198	£150,000	£549,112	£10,000	-£6,818	£3,182	0.46%	0.43%
8	Crown Wood Primary	379	£150,000	£1,051,078	£10,000	-£13,052	-£3,052	-0.25%	-0.22%
9	Crowthorne Primary	209	£150,000	£579,618	£10,000	-£7,197	£2,803	0.38%	0.36%
10	Fox Hill Primary	181	£150,000	£501,966	£10,000	-£6,233	£3,767	0.58%	0.47%
11	Great Hollands Primary	314	£150,000	£870,814	£10,000	-£10,813	-£813	-0.08%	-0.06%
12	Harmans Water Primary	624	£150,000	£1,730,534	£10,000	-£21,489	-£11,489	-0.61%	-0.52%
13	Holly Spring Infant	258	£150,000	£715,509	£10,000	-£8,885	£1,115	0.13%	0.12%
14	Holly Spring Junior	227	£150,000	£629,537	£10,000	-£7,817	£2,183	0.28%	0.25%
15	Jennetts Park Primary	203	£150,000	£562,978	£10,000	-£6,991	£3,009	0.42%	0.37%
16	Meadow Vale Primary	474	£150,000	£1,314,540	£10,000	-£16,323	-£6,323	-0.43%	-0.38%
17	New Scotland Hill Primary	206	£150,000	£571,298	£10,000	-£7,094	£2,906	0.40%	0.38%
18	Owlsmoor Primary	485	£150,000	£1,345,047	£10,000	-£16,702	-£6,702	-0.45%	-0.41%
19	The Pines Primary	174	£150,000	£482,553	£10,000	-£5,992	£4,008	0.63%	0.53%
20	Sandy Lane Primary	587	£150,000	£1,627,922	£10,000	-£20,214	-£10,214	-0.57%	-0.49%
21	St Joseph's Primary	210	£150,000	£582,391	£10,000	-£7,232	£2,768	0.38%	0.35%
22	St Margaret Clitheroe Primary	201	£150,000	£557,432	£10,000	-£6,922	£3,078	0.44%	0.40%
23	St Michael's (East) Primary	242	£150,000	£671,137	£10,000	-£8,334	£1,666	0.20%	0.19%
24	St Michael's (Sand) Primary	212	£150,000	£587,938	£10,000	-£7,301	£2,699	0.37%	0.36%
25	Uplands Primary	208	£150,000	£576,845	£10,000	-£7,163	£2,837	0.39%	0.37%
26	Warfield Primary	204	£150,000	£565,752	£10,000	-£7,025	£2,975	0.42%	0.38%
27	Whitegrove Primary	446	£150,000	£1,236,888	£10,000	-£15,359	-£5,359	-0.39%	-0.36%
28	Wildmoor Heath Primary	163	£150,000	£452,047	£10,000	-£5,613	£4,387	0.73%	0.66%
29	Wildridings Primary	340	£150,000	£942,919	£10,000	-£11,709	-£1,709	-0.16%	-0.13%
30	Winkfield St Mary's Primary	208	£150,000	£576,845	£10,000	-£7,163	£2,837	0.39%	0.37%
31	Wooden Hill Primary	315	£150,000	£873,587	£10,000	-£10,848	-£848	-0.08%	-0.07%
32	The Brakenhale	882	£150,000	£3,535,516	£10,000	-£9,472	£528	0.01%	0.01%
33	Easthampstead Park	718	£150,000	£2,878,118	£10,000	-£7,711	£2,289	0.08%	0.06%
34	Edgbarrow	1,013	£150,000	£4,060,632	£10,000	-£10,879	-£879	-0.02%	-0.02%
35	Garth Hill College	1,306	£150,000	£5,235,129	£10,000	-£14,025	-£4,025	-0.07%	-0.06%
36	Ranelagh	768	£150,000	£3,078,544	£10,000	-£8,248	£1,752	0.05%	0.05%
37	Sandhurst	900	£150,000	£3,607,669	£10,000	-£9,665	£335	0.01%	0.01%
Total Primary		9,002	£4,650,000	£24,965,174	£310,000	-£310,000	£0	0.00%	0.00%
Total Secondary		5,587	£900,000	£22,395,607	£60,000	-£60,000	£0	0.00%	0.00%
GRAND TOTAL		14,589	£5,550,000	£47,360,781	£370,000	-£370,000	£0	0.00%	0.00%

Summary:

Primary Maximum increase.	£4,387	0.73%	0.66%
Primary Maximum reduction.	-£11,489	-0.61%	-0.52%
Secondary Maximum increase.	£2,289	0.08%	0.06%
Secondary Maximum reduction.	-£4,025	-0.07%	-0.06%

Potential financial effect from allocating lump sum payments of £170k

		Original 2013-14 Budget			Increase to £170K		Net Change in Funding		
	Primary funding rate		£150,000	£2,773.29	£170,000	-£68.87			
	Secondary funding rate		£150,000	£4,008.52	£170,000	-£21.48			
Ref	School	Total number on roll October 2012	Original lump sum	Headcount Funding	Increase in Lump sum	Contribution from Headcount Funding	Amount	This Factor	Total Budget
1	Ascot Heath Infant	207	£150,000	£574,071	£20,000	-£14,257	£5,743	0.79%	0.76%
2	Ascot Heath Junior	239	£150,000	£662,817	£20,000	-£16,461	£3,539	0.44%	0.42%
3	Binfield Primary	416	£150,000	£1,153,689	£20,000	-£28,651	-£8,651	-0.66%	-0.63%
4	Birch Hill Primary	373	£150,000	£1,034,438	£20,000	-£25,690	-£5,690	-0.48%	-0.43%
5	College Town Infant	221	£150,000	£612,898	£20,000	-£15,221	£4,779	0.63%	0.59%
6	College Town Junior	278	£150,000	£770,975	£20,000	-£19,147	£853	0.09%	0.09%
7	Cranbourne Primary	198	£150,000	£549,112	£20,000	-£13,637	£6,363	0.91%	0.86%
8	Crown Wood Primary	379	£150,000	£1,051,078	£20,000	-£26,103	-£6,103	-0.51%	-0.44%
9	Crowthorne Primary	209	£150,000	£579,618	£20,000	-£14,395	£5,605	0.77%	0.72%
10	Fox Hill Primary	181	£150,000	£501,966	£20,000	-£12,466	£7,534	1.16%	0.95%
11	Great Hollands Primary	314	£150,000	£870,814	£20,000	-£21,626	-£1,626	-0.16%	-0.13%
12	Harmans Water Primary	624	£150,000	£1,730,534	£20,000	-£42,977	-£22,977	-1.22%	-1.04%
13	Holly Spring Infant	258	£150,000	£715,509	£20,000	-£17,769	£2,231	0.26%	0.24%
14	Holly Spring Junior	227	£150,000	£629,537	£20,000	-£15,634	£4,366	0.56%	0.50%
15	Jennetts Park Primary	203	£150,000	£562,978	£20,000	-£13,981	£6,019	0.84%	0.73%
16	Meadow Vale Primary	474	£150,000	£1,314,540	£20,000	-£32,646	-£12,646	-0.86%	-0.76%
17	New Scotland Hill Primary	206	£150,000	£571,298	£20,000	-£14,188	£5,812	0.81%	0.76%
18	Owlsmoor Primary	485	£150,000	£1,345,047	£20,000	-£33,404	-£13,404	-0.90%	-0.81%
19	The Pines Primary	174	£150,000	£482,553	£20,000	-£11,984	£8,016	1.27%	1.07%
20	Sandy Lane Primary	587	£150,000	£1,627,922	£20,000	-£40,429	-£20,429	-1.15%	-0.98%
21	St Joseph's Primary	210	£150,000	£582,391	£20,000	-£14,463	£5,537	0.76%	0.69%
22	St Margaret Clitherow Primary	201	£150,000	£557,432	£20,000	-£13,844	£6,156	0.87%	0.80%
23	St Michael's (East) Primary	242	£150,000	£671,137	£20,000	-£16,667	£3,333	0.41%	0.38%
24	St Michael's (Sand) Primary	212	£150,000	£587,938	£20,000	-£14,601	£5,399	0.73%	0.73%
25	Uplands Primary	208	£150,000	£576,845	£20,000	-£14,326	£5,674	0.78%	0.74%
26	Warfield Primary	204	£150,000	£565,752	£20,000	-£14,050	£5,950	0.83%	0.76%
27	Whitegrove Primary	446	£150,000	£1,236,888	£20,000	-£30,718	-£10,718	-0.77%	-0.72%
28	Wildmoor Heath Primary	163	£150,000	£452,047	£20,000	-£11,226	£8,774	1.46%	1.31%
29	Wildridings Primary	340	£150,000	£942,919	£20,000	-£23,417	-£3,417	-0.31%	-0.27%
30	Winkfield St Mary's Primary	208	£150,000	£576,845	£20,000	-£14,326	£5,674	0.78%	0.75%
31	Wooden Hill Primary	315	£150,000	£873,587	£20,000	-£21,695	-£1,695	-0.17%	-0.14%
32	The Brakenhale	882	£150,000	£3,535,516	£20,000	-£18,944	£1,056	0.03%	0.02%
33	Easthampstead Park	718	£150,000	£2,878,118	£20,000	-£15,422	£4,578	0.15%	0.12%
34	Edgbarrow	1,013	£150,000	£4,060,632	£20,000	-£21,758	-£1,758	-0.04%	-0.04%
35	Garth Hill College	1,306	£150,000	£5,235,129	£20,000	-£28,051	-£8,051	-0.15%	-0.13%
36	Ranelagh	768	£150,000	£3,078,544	£20,000	-£16,495	£3,505	0.11%	0.10%
37	Sandhurst	900	£150,000	£3,607,669	£20,000	-£19,331	£669	0.02%	0.02%
Total Primary		9,002	£4,650,000	£24,965,174	£620,000	-£620,000	£0	0.00%	0.00%
Total Secondary		5,587	£900,000	£22,395,607	£120,000	-£120,000	£0	0.00%	0.00%
GRAND TOTAL		14,589	£5,550,000	£47,360,781	£740,000	-£740,000	£0	0.00%	0.00%

Summary:

Primary Maximum increase.	£8,774	1.46%	1.31%
Primary Maximum reduction.	-£22,977	-1.22%	-1.04%
Secondary Maximum increase.	£4,578	0.15%	0.12%
Secondary Maximum reduction.	-£8,051	-0.15%	-0.13%

Potential financial effect from allocating lump sum payments of £175k

		Original 2013-14 Budget			Increase to £175K		Net Change in Funding		
	Primary funding rate		£150,000	£2,773.29	£175,000	£86.09			
	Secondary funding rate		£150,000	£4,008.52	£175,000	£26.85			
Ref	School	Total number on roll October 2012	Original lump sum	Headcount Funding	Increase in Lump sum	Contribution from Headcount Funding	Amount	This Factor	Total Budget
1	Ascot Heath Infant	207	£150,000	£574,071	£25,000	£17,821	£7,179	0.99%	0.95%
2	Ascot Heath Junior	239	£150,000	£662,817	£25,000	£20,576	£4,424	0.54%	0.52%
3	Binfield Primary	416	£150,000	£1,153,689	£25,000	£35,814	£10,814	-0.83%	-0.79%
4	Birch Hill Primary	373	£150,000	£1,034,438	£25,000	£32,112	£7,112	-0.60%	-0.54%
5	College Town Infant	221	£150,000	£612,898	£25,000	£19,026	£5,974	0.78%	0.74%
6	College Town Junior	278	£150,000	£770,975	£25,000	£23,934	£1,066	0.12%	0.11%
7	Cranbourne Primary	198	£150,000	£549,112	£25,000	£17,046	£7,954	1.14%	1.07%
8	Crown Wood Primary	379	£150,000	£1,051,078	£25,000	£32,629	£7,629	-0.64%	-0.55%
9	Crowthorne Primary	209	£150,000	£579,618	£25,000	£17,993	£7,007	0.96%	0.90%
10	Fox Hill Primary	181	£150,000	£501,966	£25,000	£15,583	£9,417	1.44%	1.19%
11	Great Hollands Primary	314	£150,000	£870,814	£25,000	£27,033	£2,033	-0.20%	-0.16%
12	Harmans Water Primary	624	£150,000	£1,730,534	£25,000	£53,721	£28,721	-1.53%	-1.31%
13	Holly Spring Infant	258	£150,000	£715,509	£25,000	£22,212	£2,788	0.32%	0.30%
14	Holly Spring Junior	227	£150,000	£629,537	£25,000	£19,543	£5,457	0.70%	0.62%
15	Jennetts Park Primary	203	£150,000	£562,978	£25,000	£17,477	£7,523	1.06%	0.91%
16	Meadow Vale Primary	474	£150,000	£1,314,540	£25,000	£40,808	£15,808	-1.08%	-0.95%
17	New Scotland Hill Primary	206	£150,000	£571,298	£25,000	£17,735	£7,265	1.01%	0.95%
18	Owsmoor Primary	485	£150,000	£1,345,047	£25,000	£41,755	£16,755	-1.12%	-1.02%
19	The Pines Primary	174	£150,000	£482,553	£25,000	£14,980	£10,020	1.58%	1.34%
20	Sandy Lane Primary	587	£150,000	£1,627,922	£25,000	£50,536	£25,536	-1.44%	-1.22%
21	St Joseph's Primary	210	£150,000	£582,391	£25,000	£18,079	£6,921	0.94%	0.87%
22	St Margaret Clitherow Primary	201	£150,000	£557,432	£25,000	£17,304	£7,696	1.09%	1.00%
23	St Michael's (East) Primary	242	£150,000	£671,137	£25,000	£20,834	£4,166	0.51%	0.48%
24	St Michael's (Sand) Primary	212	£150,000	£587,938	£25,000	£18,251	£6,749	0.91%	0.91%
25	Uplands Primary	208	£150,000	£576,845	£25,000	£17,907	£7,093	0.98%	0.93%
26	Warfield Primary	204	£150,000	£565,752	£25,000	£17,563	£7,437	1.04%	0.95%
27	Whitegrove Primary	446	£150,000	£1,236,888	£25,000	£38,397	£13,397	-0.97%	-0.90%
28	Wildmoor Heath Primary	163	£150,000	£452,047	£25,000	£14,033	£10,967	1.82%	1.64%
29	Wildridings Primary	340	£150,000	£942,919	£25,000	£29,271	£4,271	-0.39%	-0.33%
30	Winkfield St Mary's Primary	208	£150,000	£576,845	£25,000	£17,907	£7,093	0.98%	0.93%
31	Wooden Hill Primary	315	£150,000	£873,587	£25,000	£27,119	£2,119	-0.21%	-0.18%
32	The Brakenhale	882	£150,000	£3,535,516	£25,000	£23,680	£1,320	0.04%	0.03%
33	Easthampstead Park	718	£150,000	£2,878,118	£25,000	£19,277	£5,723	0.19%	0.15%
34	Edgbarrow	1,013	£150,000	£4,060,632	£25,000	£27,197	£2,197	-0.05%	-0.05%
35	Garth Hill College	1,306	£150,000	£5,235,129	£25,000	£35,064	£10,064	-0.19%	-0.16%
36	Ranelagh	768	£150,000	£3,078,544	£25,000	£20,619	£4,381	0.14%	0.13%
37	Sandhurst	900	£150,000	£3,607,669	£25,000	£24,163	£837	0.02%	0.02%
Total Primary		9,002	£4,650,000	£24,965,174	£775,000	£775,000	£0	0.00%	0.00%
Total Secondary		5,587	£900,000	£22,395,607	£150,000	£150,000	£0	0.00%	0.00%
GRAND TOTAL		14,589	£5,550,000	£47,360,781	£925,000	£925,000	£0	0.00%	0.00%

Summary:

Primary Maximum increase.	£10,967	1.82%	1.64%
Primary Maximum reduction.	£28,721	-1.53%	-1.31%
Secondary Maximum increase.	£5,723	0.19%	0.15%
Secondary Maximum reduction.	£10,064	-0.19%	-0.16%

Outline of services subject to de-delegation and indicative funding allocations

		2013-2014 de-delegated budgets				Newly classified de-delegated budgets				
Primary funding rate						£3.56	£12.22	£15.28		
Secondary funding rate						£3.56	£0.00	£15.28		
Reference		A	B	C	D	E	F	G		
Ref	School	Support to schools in financial difficulty	Support to underperforming ethnic minority and bi-lingual pupils	SIMS and other licence fees	Staff supply cover for official absences	Premature retirement / dismissal costs	Support to new, amalgamating or closing schools, plus exceptional costs in primary schools	Free school meals eligibility checking	Total	Ref
1	Ascot Heath Infant	£2,989	£5,278	£1,333	£4,925	£738	£2,529	£122	£17,914	1
2	Ascot Heath Junior	£3,451	£1,747	£1,539	£5,686	£852	£2,920	£137	£16,333	2
3	Binfield Primary	£6,008	£3,643	£2,678	£9,897	£1,483	£5,083	£183	£28,976	3
4	Birch Hill Primary	£5,387	£2,697	£2,402	£8,874	£1,330	£4,558	£687	£25,934	4
5	College Town Infant	£3,192	£8,867	£1,423	£5,258	£788	£2,701	£275	£22,503	5
6	College Town Junior	£4,015	£4,192	£1,790	£6,614	£991	£3,397	£183	£21,182	6
7	Cranbourne Primary	£2,859	£1,235	£1,275	£4,711	£706	£2,419	£107	£13,312	7
8	Crown Wood Primary	£5,473	£6,778	£2,440	£9,017	£1,351	£4,631	£733	£30,423	8
9	Crowthorne Primary	£3,018	£1,815	£1,346	£4,972	£745	£2,554	£122	£14,572	9
10	Fox Hill Primary	£2,614	£3,559	£1,165	£4,306	£645	£2,212	£718	£15,219	10
11	Great Hollands Primary	£4,535	£3,977	£2,022	£7,470	£1,119	£3,837	£1,344	£24,304	11
12	Harmans Water Primary	£9,011	£5,521	£4,018	£14,846	£2,224	£7,625	£1,360	£44,605	12
13	Holly Spring Infant	£3,726	£6,705	£1,661	£6,138	£920	£3,153	£657	£22,960	13
14	Holly Spring Junior	£3,278	£2,982	£1,462	£5,401	£809	£2,774	£474	£17,179	14
15	Jennetts Park Primary	£2,932	£1,231	£1,307	£4,830	£724	£2,481	£642	£14,145	15
16	Meadow Vale Primary	£6,845	£3,328	£3,052	£11,277	£1,690	£5,792	£801	£32,785	16
17	New Scotland Hill Primary	£2,975	£1,431	£1,326	£4,901	£734	£2,517	£76	£13,961	17
18	Owlsmoor Primary	£7,004	£3,793	£3,123	£11,539	£1,729	£5,926	£474	£33,587	18
19	The Pines Primary	£2,513	£1,467	£1,120	£4,140	£620	£2,126	£687	£12,674	19
20	Sandy Lane Primary	£8,477	£6,448	£3,779	£13,966	£2,093	£7,173	£1,176	£43,112	20
21	St Joseph's Primary	£3,033	£3,688	£1,352	£4,996	£749	£2,566	£92	£16,476	21
22	St Margaret Clitherow Primary	£2,903	£4,311	£1,294	£4,782	£717	£2,456	£153	£16,616	22
23	St Michael's (East) Primary	£3,495	£3,675	£1,558	£5,758	£863	£2,957	£382	£18,687	23
24	St Michael's (Sand) Primary	£3,062	£607	£1,365	£5,044	£756	£2,591	£122	£13,546	24
25	Uplands Primary	£3,004	£406	£1,339	£4,949	£741	£2,542	£76	£13,057	25
26	Warfield Primary	£2,946	£810	£1,313	£4,853	£727	£2,493	£61	£13,204	26
27	Whitegrove Primary	£6,441	£5,247	£2,872	£10,611	£1,590	£5,450	£76	£32,286	27
28	Wildmoor Heath Primary	£2,354	£3,457	£1,049	£3,878	£581	£1,992	£153	£13,464	28
29	Wildridings Primary	£4,910	£6,900	£2,189	£8,089	£1,212	£4,155	£886	£28,341	29
30	Winkfield St Mary's Primary	£3,004	£1,633	£1,339	£4,949	£741	£2,542	£76	£14,284	30
31	Wooden Hill Primary	£4,549	£1,868	£2,028	£7,494	£1,123	£3,849	£611	£21,523	31
32	The Brakenhale	£23,680	£4,541	£5,129	£20,720	£3,143	£0	£1,772	£58,985	32
33	Easthampstead Park	£19,277	£3,318	£4,175	£16,867	£2,559	£0	£1,405	£47,602	33
34	Edgbarrow	£27,197	£2,620	£5,891	£23,797	£3,610	£0	£367	£63,482	34
35	Garth Hill College	£35,064	£4,192	£7,595	£30,681	£4,654	£0	£1,604	£83,789	35
36	Ranelagh	£20,619	£0	£4,466	£18,042	£2,737	£0	£272	£46,136	36
37	Sandhurst	£24,163	£3,493	£5,234	£21,143	£3,207	£0	£932	£58,172	37
Total Primary		£130,000	£109,296	£57,960	£214,170	£32,090	£110,000	£13,648	£667,164	
Total Secondary		£150,000	£18,164	£32,490	£131,250	£19,910	£0	£6,352	£358,166	
GRAND TOTAL		£280,000	£127,460	£90,450	£345,420	£52,000	£110,000	£20,000	£1,025,330	

A Support to schools in financial difficulty

Service description		Main Responsibilities / functions
<p>This funding is mainly used to support schools facing financial difficulty meeting the following criteria:</p> <ul style="list-style-type: none"> • were unable to set a balanced budget and were in need of a loan arrangement at the start of the relevant financial year, and/or • were likely to fall into one of the categories of causing concern, including notice to improve and special measures without additional financial support <p>Funding allocations from this budget are subject to meeting criteria set by the Schools Forum, which also receives regular progress reports.</p>		<p>Where schools enter an Ofsted category of concern (considered inadequate and having serious weaknesses or placed in Special Measures) the LA establishes a Management Intervention Board (MIB). The Board has an independent chair and senior officers of the LA as members. The headteacher and Chair of Governors of the school also attend the MIB to report on progress. A support plan outlines the actions to be taken by the school and the LA in order to effect rapid improvement. This budget supports the additional costs that need to be incurred to effect improvement.</p>
Method of allocation		Reason for allocation method
<p>A A standard amount per pupil.</p>		<p>There is no available method of allocation that would properly target funds to relevant schools. An amount per pupil is considered the best option.</p>
Benefits of a centrally managed service:		
<p>Main benefits include:</p> <ul style="list-style-type: none"> • Ability to target resources to the schools facing financial difficulty e.g. in an Ofsted category, recently opened etc. • The MIB allows for a successful approach to be adopted to support improvement, aligned with additional resources paid directly to schools and holds relevant schools accountable for how funds are spend. • Any unspent funding at year end must be used in the calculation of total funds available to schools in the next financial year 		
Estimated Budget (2013/2014 prices)		Indication of LA service provision
	£k	<p>The LA intends to seek to de-delegate this function in order to apply a strategic approach to the use of funds, in accordance with policies agreed by the Schools Forum.</p> <p>Contact Paul Clark on (01344) 354054 for further information.</p>
Primary schools	130	
Secondary schools	150	
Total	280	

B Support to underperforming EAL: English as an Additional Language (EAL)

Service description	Main Responsibilities / functions
To support underperforming EAL pupils across Bracknell Forest schools.	To work in partnership with teachers to provide: <ul style="list-style-type: none"> • Initial English language assessment • EAL pupil support (see below)
Method of allocation	Reason for allocation method
A standard amount per EAL pupil	The suggested methodology is considered the best option to align funding to need to spend.
Benefits of a centrally managed service:	
<p>Main benefits include:</p> <ul style="list-style-type: none"> • Retention of highly specialised and well regarded team able to respond quickly to assess EAL children’s needs and provide support for schools. • Initial language assessments carried out both in English and pupil first language (where appropriate) by members of a specialist team. • Detailed individual reports for each EAL pupil assessed written and passed on to relevant schools, families and pupils • Pupils supported in a variety of ways to support the work of the schools and teachers. This can be in class, clearly defined withdrawal based, individual pupil support or group support. • Support and advice provided to 6th forms and EAL pupils in 6th forms to aid transitions through F.E. and onto H.E. • Lesson content devised and delivered by specialist team members around developing academic understanding across all subject areas • Long term focus on assisting curriculum access for EAL pupils to make positive progress • Continuous and effective collaboration with teachers and teaching assistants feeding back lesson progress and sharing good practice • Support for head teachers and SLT to ensure statutory duties are reflected through school policies and functions. Support for staff training and staff meetings. • Support for a range of GCSE language options and IGCSE. Schools and pupils aided in preparation and entry. Advice to schools and parents. • Development and delivery of EAL focused inter-school linking programmes • School based programmes supported and developed to work closely with the local community • Schools supported in communicating with EAL/BME families during parents’ evenings • Specialist training courses developed and routinely delivered • Support for pupils not related to their point of entry or length of stay in school but determined by need • Availability of service to schools as and when a new arrival joins. This flexible approach ensures that the initial assessment is carried out within three working days of a referral made and personalised timely recommendations and support is provided. • A pupil takes on average around 3 – 5 years to develop their social communications skills in English. The EAL & Diversity Team support pupils, where appropriate, for periods longer than this to develop their English language skills to progress academically (usually 4 – 7 years for new arrivals). • Progress of supported pupils tracked each half term providing schools and the LA with important performance monitoring information. • EAL progress and attainment data consistently analysed to align services to meet current and determine future trends and to inform reports to the Council and central government. 	

Estimated Budget (2013/2014 prices)		Indication of LA service provision
	£k	The LA intends to seek to de-delegate this function
Primary	108	Contact Kashif Nawaz on (0118) 9366431 for further information on this service.
Secondary	19	
Total	127	

C Licences / subscriptions: SIMS licences

Service description		Main Responsibilities / functions
<p>This budget covers the cost of providing support to the software required to perform most of the administration tasks in schools.</p> <p>It relates to the payment to CAPITA (software supplier) for software maintenance support.</p>		<p>This relates closely to the SIMS Admin SLA currently in place. Responsibilities include :</p> <ul style="list-style-type: none"> - Provide application support for SIMS and FMS. - Training programme for SIMS - System Upgrades
Method of allocation		Reason for allocation method
A standard amount per pupil.		The suggested methodology is considered the best option to align funding to need to spend.
Benefits of a centrally managed service:		
<p>Main benefits include:</p> <ul style="list-style-type: none"> • Experienced staff to ensure that the correct pricing from Capita is calculated correctly • Expertise in the various SIMS modules. • In line with our current support for Schools for SIMS support and Training 		
Estimated Budget (2013/2014 prices)		Indication of LA service provision
	£k	<p>The LA intends to seek to de-delegate this function</p> <p>Contact Bertie Savan on (01344) 354085 for further information on this service.</p>
Primary	58	
Secondary	31	
Total	89	

C Licences / Subscriptions: Consortium of Local Education Authorities for the Provision of Science Services (CLEAPSS)

Service description		Main Responsibilities / functions
This budget covers the cost of paying the annual invoice from C.L.E.A.P.S.S which is an advisory service providing support in science and technology for a consortium of local authorities and their schools including establishments for pupils with special needs.		The CLEAPSS subscription provides advice and resources relating to: health and safety including model risk assessments, chemicals, living organisms, equipment, sources of resources, laboratory design, facilities and fittings, technicians and their jobs, D&T facilities and fittings.
Method of allocation		Reason for allocation method
A standard amount per pupil.		The suggested methodology is considered the best option to align funding to need to spend.
Benefits of a centrally managed service:		
Main benefits include: <ul style="list-style-type: none"> By paying one invoice on behalf of all schools is a more cost effective use of administration time. 		
Estimated Budget (2013/2014 prices)		Indication of LA service provision
	£k	The LA intends to seek to de-delegate this function Contact Chris Taylor on 01344 354062 for further information on this service.
Primary	Nil	
Secondary	1	
Total	1	

D Staff supply cover costs: Official absence for reasons of maternity leave, union duties, magistrates duty, jury service, council members, suspension

Service description		Main Responsibilities / functions
<p>An insurance type scheme is in operation whereby a central budget pays for eligible staff costs when there is an absence from school for official or statutory reasons. The main areas are set out above in the title.</p> <p>Schools are responsible for any back fill costs that they determine are required to be put in place during the absence.</p> <p>The trade union arrangements cover the costs associated with consultation and representation requirements.</p>		<p>Employment law conveys a right for staff to be absent from school for certain official and/or statutory reasons or to perform certain duties. Schools need to comply with these requirements and ensure sufficient staff are in place to meet their responsibilities.</p>
Method of allocation		Reason for allocation method
A standard amount per pupil.		The suggested methodology is considered the best option to align funding to need to spend.
Benefits of a centrally managed service:		
<p>Main benefits include:</p> <ul style="list-style-type: none"> • Schools continue to pick up the costs for cover only, LA funds cost of substantive post therefore easier to budget plan • No doubling up of costs that would otherwise occur with schools need to pay cost of substantive post and supply cover • Insurance scheme shares cost risk to even out peaks and troughs as their incidence is uneven and unpredictable • Continued opportunities for collective consultation and negotiations with trade unions. 		
Estimated Budget (2013/2014 prices)		Indication of LA service provision
	£k	The LA intends to seek to de-delegate this function Contact Paul Young on 01344 354006 for further information on this service.
Primary	213	
Secondary	132	
Total	345	

E Premature Retirement / Dismissal Costs

Service description		Main Responsibilities / functions
This funding is to cover future costs that are expected to arise in schools through premature retirement and dismissal costs associated with redundancy procedures. This may also, in certain circumstances, include the termination of fixed term contracts. The incidence and likely costs are unpredictable and not generally known when schools set their budget.		Employment law and the approved funding policy set out the circumstances when individual schools will be required to fund the cost of relevant costs.
Method of allocation		Reason for allocation method
A standard amount per pupil.		There is no available method of allocation that would properly target funds to relevant schools. An amount per pupil is considered the best option.
Benefits of a centrally managed service:		
Main benefits include: <ul style="list-style-type: none"> • Available funds targeted only to those schools actually incurring costs • Easier budget planning for schools as this minimizes the need for schools to budget for a contingency to cover what are unpredictable and generally high costs • No additional costs associated with the termination of fixed term contracts 		
Estimated Budget (2013/2014 prices)		Indication of LA service provision
	£k	The LA intends to seek to de-delegate this function
Primary	32	Contact Paul Young on 01344 354006 for further information on this service.
Secondary	20	
Total	52	

F School Specific contingency

Service description		Main Responsibilities / functions
<p>This funding is to cover significant costs that may be incurred in newly opened and expanding schools, those undertaking an amalgamation or those closing schools.</p> <p>Funds are also retained to help finance significant, unexpected costs that may arise in primary schools, but at the time of setting the budget, the costs are not apparent.</p>		<p>The main reason for holding this budget relates to providing additional financial support to Jennett's Park Primary School as it expands from a 1 form entry school to a 2 form entry school. The simplified Funding Formula cannot adequately recognise the increase in costs being experienced at the start of the new academic year. In such circumstances, the Council will review the financial position of schools and make recommendations to the Schools Forum on the amount of additional funds required. The Forum makes the final decision on any funding allocations.</p> <p>A small amount of funding is also retained for primary schools to bid against should they experience significant cost increases that are outside of their control and were not anticipated when the budget was set.</p>
Method of allocation		Reason for allocation method
A standard amount per pupil.		There is no available method of allocation that would properly target funds to relevant schools. An amount per pupil is considered the best option.
Benefits of a centrally managed service:		
<p>Main benefits include:</p> <ul style="list-style-type: none"> • Ability to target resources to the schools facing cost pressures e.g. new and expanding schools • Safety net to allow a degree of protection to all primary schools • Allows in-year support where circumstances change 		
Estimated Budget (2013/2014 prices)		Indication of LA service provision
	£k	<p>The LA intends to seek to de-delegate this function in order to apply a strategic approach to the use of funds, in accordance with policies agreed by the Schools Forum.</p> <p>Contact Paul Clark on (01344) 354054 for further information.</p>
Newly opened and expanding school	100	
Exceptional costs in primary schools	10	
Total	110	

G Checking Pupil Eligibility to a Free School Meal (FSM)

Service description		Main Responsibilities / functions
By linking the Council's Housing Benefits system to the FSM application process, as soon as a parent receives the relevant benefits, schools are informed to update their census to maximise income. Parents also receive a letter informing them of their child's eligibility to a FSM.		Ensures schools have relevant information to complete the annual, national census and maximise income.
Method of allocation		Reason for allocation method
A standard amount per pupil eligible to a Free School Meal		The suggested methodology is considered the best option to align funding to the cost of the service.
Benefits of a centrally managed service:		
<p>Main benefits include:</p> <ul style="list-style-type: none"> Schools receive accurate and up to date information on pupils eligible for a Free School Meal, thereby maximising income from the Pupil Premium (expected to be £1,300 per pupil in 2014-15 for primary schools, no update available on likely amount for secondary aged pupils which is £900 in 2013-14) and the BF Funding Formula Potential for more pupils from deprived backgrounds to receive a lunchtime meal 		
Estimated Budget (2013/2014 prices)		Indication of LA service provision
	£k	The LA intends to seek to de-delegate this function
Primary	14	Contact Lesley Adams on 01344 354143 for further information on this service.
Secondary	6	
Total	20	

Outline of newly delegated behaviour support services and potential funding allocations

		Newly delegated behaviour support budgets				
Primary funding rate		varies	£1.72	£7.91		
Secondary funding rate		varies	£1.85	£0.00		
Reference		I	J	K		
Ref	School	Behaviour Support Team	Anti-bullying coordinator	Social & Emotional Aspects of Learning (SEAL)	Total Behaviour support services	Ref
1	Ascot Heath Infant	£3,901	£356	£1,637	£5,894	1
2	Ascot Heath Junior	£4,857	£411	£1,890	£7,158	2
3	Binfield Primary	£8,029	£716	£3,290	£12,035	3
4	Birch Hill Primary	£9,019	£642	£2,950	£12,611	4
5	College Town Infant	£4,696	£380	£1,748	£6,824	5
6	College Town Junior	£6,295	£478	£2,198	£8,972	6
7	Cranbourne Primary	£4,022	£341	£1,566	£5,928	7
8	Crown Wood Primary	£9,217	£652	£2,997	£12,866	8
9	Crowthorne Primary	£4,819	£360	£1,653	£6,831	9
10	Fox Hill Primary	£5,182	£311	£1,431	£6,925	10
11	Great Hollands Primary	£12,917	£540	£2,483	£15,941	11
12	Harmans Water Primary	£19,711	£1,074	£4,935	£25,720	12
13	Holly Spring Infant	£6,740	£444	£2,040	£9,225	13
14	Holly Spring Junior	£6,269	£391	£1,795	£8,454	14
15	Jennetts Park Primary	£7,948	£349	£1,605	£9,903	15
16	Meadow Vale Primary	£13,277	£816	£3,749	£17,841	16
17	New Scotland Hill Primary	£3,829	£354	£1,629	£5,813	17
18	Owlsmoor Primary	£10,598	£835	£3,835	£15,268	18
19	The Pines Primary	£5,628	£299	£1,376	£7,303	19
20	Sandy Lane Primary	£18,032	£1,010	£4,642	£23,685	20
21	St Joseph's Primary	£4,863	£361	£1,661	£6,885	21
22	St Margaret Clitherow Primary	£5,725	£346	£1,590	£7,660	22
23	St Michael's (East) Primary	£5,246	£416	£1,914	£7,576	23
24	St Michael's (Sand) Primary	£4,021	£365	£1,677	£6,062	24
25	Uplands Primary	£3,976	£358	£1,645	£5,979	25
26	Warfield Primary	£4,613	£351	£1,613	£6,577	26
27	Whitegrove Primary	£8,600	£767	£3,527	£12,895	27
28	Wildmoor Heath Primary	£3,974	£280	£1,289	£5,543	28
29	Wildridings Primary	£11,082	£585	£2,689	£14,356	29
30	Winkfield St Mary's Primary	£4,463	£358	£1,645	£6,466	30
31	Wooden Hill Primary	£10,161	£542	£2,491	£13,194	31
32	The Brakenhale	£11,266	£1,631	£0	£12,896	32
33	Easthampstead Park	£10,100	£1,328	£0	£11,427	33
34	Edgbarrow	£9,085	£1,873	£0	£10,958	34
35	Garth Hill College	£14,862	£2,415	£0	£17,277	35
36	Ranelagh	£6,599	£1,420	£0	£8,019	36
37	Sandhurst	£8,738	£1,664	£0	£10,402	37
Total Primary		£231,710	£15,490	£71,190	£318,390	
Total Secondary		£60,650	£10,330	£0	£70,980	
GRAND TOTAL		£292,360	£25,820	£71,190	£389,370	

H Behaviour Support: Consistency, Management and Cooperative Discipline

Service description		Main Responsibilities / functions
<p>This budget covers support for a Consistency Management and Cooperative Discipline (CMCD[®]) programme that was introduced into three secondary schools in 2003. CMCD[®] offers training to all teachers equipping them with classroom management skills to enhance their practice. Funding has reduced considerably over the years as the programme has become established in schools.</p>		<p>Funds delegated to the schools support revenue costs of staff trainers, resources, training and teacher release to undertake monitoring of classroom practice.</p>
Method of allocation		Reason for allocation method
<p>A standard amount per pupil.</p>		<p>There is no available method of allocation that would target funds to the three secondary schools using the programme. An amount per pupil is considered the best option.</p>
Estimated Budget (2013/2014 prices)		Indication of LA service provision
<p>Primary</p> <p>Secondary</p> <p>Total</p>	<p>£k</p> <p>Nil</p> <p>32</p> <p>32</p>	<p>The LA does not intend to offer an SLA for this service.</p> <p>Contact Bob Welch on (01344) 354185 for further information.</p>

I Behaviour Support: Behaviour Support Team

Service description	Main Responsibilities / functions
<p>This budget is used to promote and develop healthy emotional well-being and positive behaviour for children and young people.</p> <p>The Behaviour Support Team provides support to young people, children and their families in the home environment as well as helping the schools to manage behaviour.</p> <p>The team will assess the young person, child in their home and also in the school setting. This assessment informs planning and strategies in the school and in the home to help both parents and teachers to manage the child or young persons behaviour.</p> <p>The team provide a wide range of training packages for teaching and support staff. Coaching and mentoring for staff is also available.</p>	<p>Ensuring that through enhancing each school's capacity, regular attendance and successful inclusion is achieved for all in Bracknell Forest mainstream education</p> <ul style="list-style-type: none"> • Providing 1:1 support for the child or young person • Webster Stratton – Parenting programme • Strengthening Families • STOP parenting programme for parents of secondary age young people. • Behaviour Management Training to schools • Advice and Strategies to schools • In school support, 1:1 • Pyramid for Parents • Transition programme • Advice and Consultancy around Behaviour to schools. • Support to families for children experiencing emotional and behavioural issues in the school setting and at home. • Advice and training to schools and teaching assistants for children with Statements of Special Educational Needs where the main identified need is BESD. • Supporting inclusion • Training provided; Team Teach, Circle Time, Behaviour Management. • Workshops for parents
Method of allocation	Reason for allocation method
65% by a standard amount per pupil, 15% by deprivation and 25% by low prior attainment.	The suggested methodology is considered the best option to align funding to need to spend.
Benefits of a centrally managed traded service:	
<p>Main benefits include:</p> <ul style="list-style-type: none"> • The ability to manage and delegate resources on a needs basis. • Ability to flexibly support staff in the workplace. • A Team that has an understanding of the social and emotional aspects of challenging behaviour and the impact on learning. • Pool of suitably qualified and experienced staff available on a needs basis. • Responsive and reactive to the individual needs of each school at short notice. • Ability to share best practice and expertise from each school across the authority. • Highly effective ways of working and knowledge of schools already developed. • Easier to consult and develop services with schools and partner agencies. 	

Behaviour Support: Behaviour Support Team (cont)

Estimated Budget (2013/2014 prices)		Indication of LA service provision
	£k	The LA intends to offer an SLA for this function.
Primary	260	Contact Mandy Wilton on 01344 354198 for further information on this service
Secondary	57	
Total	317	

J **Behaviour Support: Anti-bullying co-ordinator**

Service description	Main Responsibilities / functions
<p>This budget covers the provision of the anti-bullying coordinator who provides interventions and training in schools. The coordinator regularly delivers a portfolio of interventions as well as running regular workshops for young people, children and teaching staff.</p> <p>Bracknell Forest Council is concerned to try to make the Borough a safe and secure environment for our children and young people and for them to be happy and achieve. Children and young people continue to highlight bullying as an issue and the anti-bullying work is recognised as an important part of the safeguarding agenda.</p>	<p>To support schools and enhance their capacity to address bullying issues to:</p> <ul style="list-style-type: none"> • Improve pupils emotional wellbeing • Improve positive behaviour • Improve school attendance • Reduce bullying <p>To coordinate and deliver the anti-bullying strategy “Taking Action Together” – Tackling bullying and promoting rights and respect: and the Action Plan:</p> <ul style="list-style-type: none"> • Liaise effectively with schools and other professionals and to contribute to interagency partnership work to enable C&YP to ‘feel and stay safe’ • Provide information for example Tackling Bullying – A guide for parents and carers • Provide training to schools, parents/carers and other professionals • Deliver Anti-Bullying road shows at BF School events • Deliver interventions and workshops to schools including assemblies, bespoke interventions and courses to address specific issues. • Work with groups of C& YP • Work with school staff in identifying and addressing bullying in school. • Work on the issues of bullying through different types of media • Lead on Anti-Bullying week which focuses on involving C&YP in initiative to raise awareness around and tackle bullying
Method of allocation	Reason for allocation method
<p>A standard amount per pupil.</p>	<p>The suggested methodology is considered the best option to align funding to need to spend.</p>

Benefits of a centrally managed traded service:		
Main benefits include: <ul style="list-style-type: none"> • Ability to respond to the individual needs of school at short notice • Ability to respond to parents/carers and support C&YP • Ability to liaise and access appropriate support advice etc from the national Anti-Bullying Alliance and to disseminate appropriately • Ability to coordinate service and to work with other agencies to prevent bullying behaviour 		
Estimated Budget (2013/2014 prices)		Indication of LA service provision
	£k	The LA intends to offer an SLA for this function
Primary	15	Contact Mandy Wilton on (01344) 354198 for further information on this service.
Secondary	10	
Total	25	

K Behaviour Support: Social and Emotional Aspects of Learning (SEAL)

Service description		Main Responsibilities / functions
<p>SEAL is a whole-school approach to promoting the social and emotional skills that underpin effective learning, positive behaviour, regular attendance, staff effectiveness and the emotional health and well-being of all who learn and work in schools. The SEAL materials provide schools with an explicit, structured curriculum framework and resource for teaching these skills to all students.</p>		<p>Funding is used to support revenue costs to provide advice and guidance to primary and secondary schools.</p> <p>The SEAL programme has been integrated into the Personal, Social and Health education curriculum and the LA's highly successful Rights Respecting Schools project. The budget supports schools to meet in clusters, accreditation routes, resources, staff costs, training and conferences.</p>
Method of allocation		Reason for allocation method
A standard amount per pupil.		The suggested methodology is considered the best option to align funding to need to spend.
Benefits of a centrally managed traded service:		
<p>Main benefits include:</p> <ul style="list-style-type: none"> • Ability to support project work in all schools, supported by LA staff • Coordination of training activities • Monitoring of the impact of the scheme in schools • Dissemination of effective practice to other schools • Liaison with UNICEF related to RRS and ensuring all schools receive appropriate guidance and access to resources and training. 		
Estimated Budget (2013/2014 prices)		Indication of LA service provision
	£k	The LA intends to offer an SLA for this function
Primary	71	Contact Bob Welch on (01344) 354185 for further information on this service.
Secondary	Nil	
Total	71	

Summary impact from changes, including MFG

Ref	School	Summary information						Original MFG		Revised MFG		Change in MFG	Net change in funding		Ref
		13-14 Budget including MFG top-up / contribution to MFG	Low prior attainment data Appendix 4 / 5	Change for Deprivation Appendix 6	Change for Mobility Appendix 7	Change in Lump sum to £160k Appendix 8 (a)	Net change Appendices 5 to 8	Top up addition where below guaranteed amount	Deduction where above MFG and experiencing an increase in per pupil funding	Top up addition where below guaranteed amount	Deduction where above MFG and experiencing an increase in per pupil funding		Amount	Total Budget	
1	Ascot Heath Infant	£756,701	£-424	£-2,449	£-144	£2,872	£-145	£0	£-15,884	£0	£-9,145	£6,739	£6,594	0.87%	1
2	Ascot Heath Junior	£854,386	£-283	£-2,902	£-96	£1,770	£-1,512	£0	£-17,184	£0	£-8,220	£8,964	£7,452	0.87%	2
3	Binfield Primary	£1,376,731	£-849	£-4,308	£-383	£-4,326	£-9,866	£0	£0	£0	£0	£0	£-9,866	-0.72%	3
4	Birch Hill Primary	£1,319,846	£-50	£-1,670	£-359	£-2,845	£-4,923	£1,667	£0	£0	£0	£-1,667	£-6,591	-0.50%	4
5	College Town Infant	£808,635	£-276	£-1,779	£-407	£2,389	£-73	£0	£-25,092	£0	£-17,272	£7,820	£7,746	0.96%	5
6	College Town Junior	£989,741	£-6	£-3,149	£-479	£427	£-3,207	£0	£-16,980	£0	£-5,237	£11,743	£8,536	0.86%	6
7	Cranbourne Primary	£744,043	£-232	£-2,433	£-455	£3,182	£61	£0	£0	£0	£0	£0	£61	0.01%	7
8	Crown Wood Primary	£1,403,976	£-265	£-120	£576	£-3,052	£-2,861	£72,979	£0	£57,452	£0	£-15,527	£-18,388	-1.31%	8
9	Crowthorne Primary	£778,616	£35	£-2,323	£-335	£2,803	£180	£0	£-11,659	£0	£-5,328	£6,331	£6,511	0.84%	9
10	Fox Hill Primary	£796,415	£174	£996	£2,736	£3,767	£7,674	£59,638	£0	£42,610	£0	£-17,028	£-9,354	-1.17%	10
11	Great Hollands Primary	£1,263,408	£689	£13,210	£-694	£-813	£12,392	£0	£0	£0	£-1,539	£-1,539	£10,853	0.86%	11
12	Harmans Water Primary	£2,209,522	£1,490	£3,628	£-1,221	£-11,489	£-7,592	£13,351	£0	£0	£0	£-13,351	£-20,944	-0.95%	12
13	Holly Spring Infant	£949,244	£28	£326	£-455	£1,115	£1,015	£0	£-19,443	£0	£-11,749	£7,695	£8,710	0.92%	13
14	Holly Spring Junior	£883,386	£316	£-440	£-335	£2,183	£1,724	£0	£0	£0	£0	£0	£1,724	0.20%	14
15	Jennetts Park Primary	£825,968	£218	£8,441	£1,171	£3,009	£12,839	£0	£-21,408	£0	£-25,596	£-4,188	£8,652	1.05%	15
16	Meadow Vale Primary	£1,670,232	£-266	£5,558	£-465	£-6,323	£-1,496	£0	£0	£0	£0	£0	£-1,496	-0.09%	16
17	New Scotland Hill Primary	£764,288	£-430	£-2,601	£-239	£2,906	£-364	£0	£-764	£0	£0	£764	£400	0.05%	17
18	Owlsmoor Primary	£1,658,151	£-294	£-4,945	£-575	£-6,702	£-12,516	£30,284	£0	£20,754	£0	£-9,530	£-22,046	-1.33%	18
19	The Pines Primary	£753,122	£254	£2,691	£-287	£4,008	£6,665	£30,333	£0	£14,911	£0	£-15,422	£-8,757	-1.16%	19
20	Sandy Lane Primary	£2,096,543	£1,146	£3,181	£-1,318	£-10,214	£-7,206	£35,411	£0	£14,128	£0	£-21,283	£-28,489	-1.36%	20
21	St Joseph's Primary	£801,384	£-255	£-423	£-216	£2,768	£1,875	£11,676	£0	£211	£0	£-11,465	£-9,590	-1.20%	21
22	St Margaret Clitherow Pry	£770,051	£179	£715	£-311	£3,078	£3,661	£0	£-16,456	£0	£-12,984	£3,472	£7,133	0.93%	22
23	St Michael's (East) Primary	£871,390	£-455	£-557	£-335	£1,666	£318	£0	£-8,274	£0	£-1,386	£6,887	£7,206	0.83%	23
24	St Michael's (Sand) Primary	£746,835	£-442	£-2,367	£-216	£2,699	£-326	£0	£-24,697	£0	£-17,138	£7,559	£7,233	0.97%	24
25	Uplands Primary	£768,603	£-361	£-2,707	£-407	£2,837	£-638	£0	£0	£0	£0	£0	£-638	-0.08%	25
26	Warfield Primary	£782,744	£8	£-2,455	£-311	£2,975	£216	£0	£-6,036	£0	£-281	£5,754	£5,971	0.76%	26
27	Whitegrove Primary	£1,493,643	£-724	£-5,913	£-694	£-5,359	£-12,690	£0	£0	£0	£0	£0	£-12,690	-0.85%	27
28	Wildmoor Heath Primary	£669,795	£91	£-1,423	£1,558	£4,387	£4,613	£6,951	£0	£0	£0	£-6,951	£-2,339	-0.35%	28
29	Wildridings Primary	£1,280,402	£867	£2,921	£5,584	£-1,709	£7,662	£5,911	£0	£0	£0	£-5,911	£1,752	0.14%	29
30	Winkfield St Mary's Primary	£764,715	£-91	£-2,707	£-311	£2,837	£-273	£0	£-14,327	£0	£-7,500	£6,828	£6,555	0.86%	30
31	Wooden Hill Primary	£1,184,929	£209	£6,005	£-575	£-848	£4,792	£0	£-8,821	£0	£-3,355	£5,466	£10,258	0.87%	31
32	The Brakenhale	£4,464,157	£-29,828	£13,793	£0	£528	£-15,507	£0	£0	£0	£0	£0	£-15,507	-0.35%	32
33	Easthampstead Park	£3,850,854	£-2,321	£35,569	£0	£2,289	£35,537	£0	£-27,360	£0	£-25,870	£1,490	£37,027	0.96%	33
34	Edgbarrow	£4,582,425	£14,869	£-26,302	£0	£-879	£-12,312	£0	£-18,984	£0	£0	£18,984	£6,672	0.15%	34
35	Garth Hill College	£6,333,481	£-3,638	£8,776	£0	£-4,025	£1,113	£0	£-103,373	£0	£-42,403	£60,970	£62,083	0.98%	35
36	Ranelagh	£3,506,075	£9,215	£-17,335	£0	£1,752	£-6,368	£88,540	£0	£44,938	£0	£-43,602	£-49,970	-1.43%	36
37	Sandhurst	£4,205,866	£11,702	£-14,501	£0	£335	£-2,464	£0	£0	£0	£0	£0	£-2,464	-0.06%	37
Total Primary		33,037,443	£0	£0	£0	£0	£0	268,201	-207,025	£150,066	£-126,730	£-37,841	£-37,841	-0.11%	
Total Secondary		26,942,858	£-1	£0	£0	£0	£-1	88,540	-149,717	£44,938	£-68,273	£37,842	£37,841	0.14%	
GRAND TOTAL		59,980,301	£-1	£0	£0	£0	£-1	356,742	-356,742	£195,004	£-195,004	£1	£0	0.00%	

Summary:

Primary Maximum increase.	£10,853	1.05%	Secondary Maximum increase.	£62,083	0.98%
Primary Maximum reduction.	£-28,489	-1.36%	Secondary Maximum reduction.	£-49,970	-1.43%

Potential funding allocations if a High Needs contingency is established for schools with disproportionate numbers

			% pupils with top-up		top-up as % total budget		Overall		
	Primary rate		4.00%		2.00%				
	Secondary rate		2.00%		1.00%				
Ref	School	No. top-up pupils by school	Top-up pupils %	Qualify? Yes / No	Top-up as % of school budget	Qualify? Yes / No	Qualify under both criteria?	2014-15 funding allocations	Ref
1	Ascot Heath Infant	3	1.45%	No	1.36%	No	No		1
2	Ascot Heath CE Junior	4	1.67%	No	1.54%	No	No		2
3	Binfield CE Aided Primary	2	0.48%	No	0.39%	No	No		3
4	Birch Hill Primary	5	1.34%	No	1.19%	No	No		4
5	College Town Infant and Nursery	1	0.45%	No	0.19%	No	No		5
6	College Town Junior	6	2.16%	No	1.31%	No	No		6
7	Cranbourne Primary	1	0.51%	No	0.46%	No	No		7
8	Crown Wood Primary	4	1.06%	No	0.71%	No	No		8
9	Crowthorne CE Primary	4	1.91%	No	2.11%	Yes	No		9
10	Fox Hill Primary	4	2.21%	No	1.53%	No	No		10
11	Great Hollands Primary	13	4.14%	Yes	3.49%	Yes	Yes	£14,300	11
12	Harmans Water Primary	10	1.60%	No	1.24%	No	No		12
13	Holly Spring Infant and Nursery	3	1.16%	No	1.33%	No	No		13
14	Holly Spring Junior	9.5	4.19%	Yes	2.72%	Yes	Yes	£10,450	14
15	Jennetts Park Primary	0	0.00%	No	0.00%	No	No		15
16	Meadow Vale Primary	3	0.63%	No	0.45%	No	No		16
17	New Scotland Hill Primary	4	1.94%	No	1.05%	No	No		17
18	Owlsmoor Primary	4	0.82%	No	0.87%	No	No		18
19	The Pines Primary and Nursery	1	0.57%	No	1.30%	No	No		19
20	Sandy Lane Primary	6	1.02%	No	0.46%	No	No		20
21	St Joseph's Catholic Primary	6	2.86%	No	3.14%	Yes	No		21
22	St Margaret Clitherow Catholic Primary	3	1.49%	No	1.39%	No	No		22
23	St Michael's Easthampstead CE Aided P	5	2.07%	No	2.06%	Yes	No		23
24	St Michael's CE Aided Primary (Sandhur	0	0.00%	No	0.00%	No	No		24
25	Uplands Primary	2	0.96%	No	0.65%	No	No		25
26	Warfield CE Primary	3	1.47%	No	2.19%	Yes	No		26
27	Whitegrove Primary	5	1.12%	No	1.18%	No	No		27
28	Wildmoor Heath	1	0.61%	No	0.23%	No	No		28
29	Wildridings Primary	7	2.06%	No	1.64%	No	No		29
30	Winkfield St Mary's CE Primary	0	0.00%	No	0.00%	No	No		30
31	Wooden Hill Primary and Nursery	9	2.86%	No	2.66%	Yes	No		31
32	The Brakenhale	18	2.04%	Yes	1.19%	Yes	Yes	£19,800	32
33	Easthampstead Park Community School	14	1.95%	No	0.66%	No	No		33
34	Edgbarrow	30	2.96%	Yes	2.87%	Yes	Yes	£33,000	34
35	Garth Hill College	23	1.76%	No	0.72%	No	No		35
36	Ranelagh CE	22	2.86%	Yes	1.97%	Yes	Yes	£24,200	36
37	Sandhurst	9	1.00%	No	0.52%	No	No		37
Primary total		128.5	1.43%	2	1.27%	7	2	£24,750	
Secondary total		116	2.08%	3	1.45%	3	3	£77,000	
Total ALL		244.5	1.68%	5	1.35%	10	5	£101,750	

Policy for Funding School Redundancies

11.16 Responsibilities for redundancies

The costs of new early retirements or redundancies will continue to be charged to the ~~central part of the Schools Budget~~ where the local authority can demonstrate that the revenue savings achieved by any termination of employment are equal to or greater than the costs incurred. ~~This will be done on the basis that any redundancy situation the school finds itself will be treated as a staffing re-organisation.~~ **This will be achieved through a de-delegated contingency to support individual schools where a governing body has incurred expenditure which it would be unreasonable to expect them to meet from the school's budget share.**

The Council's Redundancy procedures must be followed to enable the redundancy costs to be met from a de-delegated budget ~~being met through this central schools budget~~. This includes early notification of the staffing re-organisation to ensure adequate time for consultation with staff and trade unions. Failure to follow these procedures could result in costs being charged against the delegated school budget.

The severance costs will be calculated under the local authority's policy. Where a school decides to offer more generous terms than the authority's policy, then the excess charge will be made to the delegated school budget.

The Schools Forum must agree to any increase in this budget over the previous financial year. The local authority will make a best estimate of what may be needed, based on past experience, local knowledge of the financial position of individual schools and the context of that year's funding settlement. To achieve best use of resources, the local authority will actively pursue a redeployment policy, to match staff at risk to **suitable** vacancies.

Any costs incurred by the local education authority in respect of any premature retirement of a member of the staff of a maintained school shall be met from the school's budget share for one or more financial years except where the authority has agreed with the governing body in writing (whether before or after the retirement occurs) to meet these costs centrally.

Additions to the policy are in **bold and underlined**.

Deletions to the policy have been ~~struck through~~.

Responsibility for repairs and maintenance

12.4 Authority responsibility

In classifying different types of work, only those that fit the definition of capital determined by the local authority for financial accounting purposes in line with the CIPFA Code of Practice on local authority accounting have been retained as an authority responsibility.

Where there is any doubt, or items of work are not included on the illustrative Annex, it should be assumed that they are a school responsibility and will only be funded from capital if the work is undertaken after agreement has been received from the Chief Officer: Property Services. The authority will not reimburse schools retrospectively where it is found that capital related work has been funded from the school's delegated budget, unless in the opinion of the Borough Surveyor, it would ordinarily have formed part of that year's capital programme.

In undertaking capital maintenance, the authority will adopt the following approach, as agreed following consultation with schools and agreement from the Schools Forum:

- a. Building condition surveys will continue to be used to identify, prioritise and estimate the cost of planned maintenance works, and these will be regularly updated.
- b. The Council will target its resources on the most urgent items, giving priority to compliance, health & safety and those items that have been judged to carry significant risk of disruption to school operations or school closures.
- c. Where the Council undertakes works in a school the school will be expected to contribute 10% of the cost from its Devolved Capital Funding, up to a maximum ceiling of 75% of their Devolved Formula Capital allocation. **The contribution will be paid in the year that the works are undertaken.**
- ~~d. The contribution referred to above in c. will be subject to abatement where a school has previously agreed with the Council for the allocation of its Devolved Formula Capital to an alternative capital project.~~
- d.** The balance of schools Devolved Formula Capital funding will be for the individual school to prioritise. The LA will continue to advise schools to prioritise DFC firstly on Health & Safety/Compliance works, secondly on addressing as many outstanding Priority 1 items as possible.

Additions to the policy are in **bold and underlined**.

Deletions to the policy have been ~~struck through~~.

**TO: SCHOOLS FORUM
12 SEPTEMBER 2013**

**2012-13 SCHOOL BALANCES
(Director of Children, Young People and Learning)**

1 PURPOSE OF REPORT

- 1.1 This is an annual report, the purpose of which is to update members of the Schools Forum on the level of balances held by schools as at 31 March 2013, how these compare to the previous financial year and to consider whether any significant surplus balances should be subject to claw-back and re-invested within the overall Schools Budget.

2 RECOMMENDATIONS

That the Schools Forum NOTES:

- 2.1 **The level of aggregate surplus revenue balances as at 31 March 2013 totalled £4.573m, a decrease of £0.054m (1.2%) from the previous year (paragraph 5.4 (1));**
- 2.2 **That at 6.5% of annual income, average surplus balances are in excess of the amount required for working balances and that more funds could have been spent by schools on their key priorities (paragraph 5.4 (3));**
- 2.3 **That significant surplus revenue balances totalled £1.143m, an increase of £0.017m (1.5%) from the previous year (paragraph 5.7);**
- 2.4 **That £0.443m of Devolved Formula Capital grant remained unspent at 31 March 2013, a decrease of £0.424m (48.9%) from the previous year (paragraph 5.11 (1));**
- 2.5 **That relevant schools had indicated that the £0.092m of Devolved Formula Capital grant funding was due to expire at 31 August 2013 would be fully spent (paragraph 5.13 (4)).**

That the Schools Forum AGREES:

- 2.6 **That all of the significant surplus balances held by schools have been assigned for relevant purposes and should not be subject to claw back (paragraph 5.9).**

3 REASONS FOR RECOMMENDATIONS

- 3.1 **It is appropriate for the Schools Forum to be aware of, and where relevant, comment on these financial matters.**

4 ALTERNATIVE OPTIONS CONSIDERED

4.1 Not applicable.

5 SUPPORTING INFORMATION

Calculating Statutory School Balances

5.1 The School Standards and Framework Act 1998 provides a statutory requirement for the balance of expenditure made by each school compared to its budget share to be carried forward for use by individual governing bodies in the next financial year. This requirement is confirmed in the Scheme for Financing Schools which applies to both surplus and deficit balances and relates to all revenue funds held by schools in local authority accounts.

5.2 With effect from April 2013, the requirements of the Scheme for Financing Schools became applicable to Pupil Referral Units (PRUs), which means that College Hall PRU is included in this report for the first time.

5.3 Attached at Annex A is a list of individual school balances as at 31 March 2013. For comparison, the annex also shows the change from the 2011-12 year end position. Annex B provides a summary profile of deficit and surplus balances.

5.4 Some comments on the analysis are as follows:

1. Aggregate surplus balances have decreased by £0.054m, from £4.627m to £4.573m. This is a decrease of 1.2%.
2. There has been a net increase in surplus balances in the primary and PRU sectors of £0.050m (+1.8%). Aggregate surpluses in the secondary and special sectors have decreased by £0.104m (-5.5%).
3. On average, at 6.5% of total budget, overall reserves are considered to be at a more than adequate level required for working balances to cover unforeseen circumstances and therefore more money could have been spent by schools on their key objectives.
4. The aggregate surplus balance of £4.573m comprises £4.609m from surpluses (was £4.656m) and £0.036m in deficits (was £0.029m). There has been a marginal deterioration in the level of both surplus and deficit balances.
5. The largest surplus balance as a percentage of budget is 16.8% (was 19.1%) and the greatest deficit is 2.9% (was 4.4%). There are limited circumstances where a surplus balance of 16.8% of annual income can be warranted.
6. Two primary schools were in deficit at the end of the 2012-13 financial year. For Cranbourne, the Forum has previously agreed a licensed deficit arrangement with the school and the terms are expected to be met, with a return to surplus balance anticipated no later than March 2015. For College Town Junior School, a balanced budget plan has been submitted for 2013-14 which is expected to be delivered. Therefore, no significant concerns exist in respect of schools with deficit balances.

Significant surplus balances

- 5.5 Following consultation with schools, the Forum agreed that where significant balances are not being held for a valid purpose, with effect from 2012-13 accounts, a claw-back scheme would be applied to remove relevant amounts for re-distribution within the Schools Budget. This was based on the principle that generally speaking, annual funding should be spent on pupils in school that year and not held back unnecessarily.
- 5.6 Members of the Forum will recall that balances in excess of 5% for secondary and special schools or 8% for primary schools or PRUs have been defined as significant and that a range of valid purposes have been agreed that permit schools to retain surplus balances above these levels.
- 5.7 Ten schools were identified as holding a significant surplus, which compares to sixteen at the end of 2011-12, of which eight continue with a significant surplus for the fifth consecutive year. The aggregate level of significant surplus balances amounts to £1.143m, an increase of £0.017m (1.5%).
- 5.8 In light of the significant redistribution of funds between schools arising from the national school funding reforms, the Forum determined that any significant surplus balance held by a school losing money through these changes would not be subject to claw-back before 31 March 2015. Taking account of this new condition means only four schools held significant surpluses that would be subject to the claw-back scheme which in total aggregate to £0.470m.
- 5.9 Relevant schools have provided statements that confirm that these funds are being held for valid reasons, as set out in the scheme, and therefore the Forum is recommended to agree that no claw-back should be applied to 2012-13 balances. A summary of intended use of the significant surpluses is as follows:
- £0.015m for capital buildings and construction
 - £0.042m for infrastructure, maintenance and refurbishment
 - £0.187m for staffing remodelling and restructuring
 - £0.226m for a known future budget reduction
- 5.10 It is important that schools carefully plan their budgets and balance the need to hold funding as a contingency for the future whilst at the same time ensuring the maximum investment is made in the school each year to help achieve improvement targets. A prudent approach to spending is recommended in the current economic climate, but it should not in itself lead to continued increases in balances.

Capital Funding

- 5.11 Schools receive direct funding for capital projects through the DfE Devolved Formula Capital Grant (DFC). DFC is allocated as a specific grant through a national formula in response to the continuing need for additional resources and must be spent on improving the condition and suitability of school accommodation as well as ICT hardware. Individual projects need to be at least £2,000 to qualify as capital related expenditure and need to be approved by the Council before they can proceed. Schools can pool their funding amongst each other or add it as a contribution to projects undertaken by the Council. Funding must be spent on eligible expenditure within 3 years and one term of receipt or be returned to the DfE.

- 5.12 As voluntary aided (VA) schools own and are responsible for the maintenance of their buildings, different arrangements are in place, outside local authority accounts, and therefore, information on the 5 VA schools in Bracknell Forest are not available for inclusion in this report.

Annex C provides a summary of individual school balances of DFC as at 31 March 2013.

- 5.13 Some comments on the analysis are as follows:

1. Aggregate unspent balances have decreased by £0.425m, from £0.868m to £0.443m. This is a decrease of 49% and is mainly accounted for through a number of significant schemes being completed by schools.
2. The level of capital balances are not considered excessive as schools tend to save funds over a number of years before committing to significant projects.
3. The aggregate level of surplus balances continues to fall significantly as projects complete and less funding is being provided by the DfE.
4. Uplands Primary School had a deficit balance at year end which arose as a result of an agreed draw-down of their 2013-14 DFC allocation.
5. Five schools were in danger of having to return unspent grant at 31 August 2013, which aggregates to £0.092m. Relevant schools have been informed of this risk and by the end of the summer term, all had indicated that they intended to fully spend the amounts by the deadline.

Conclusions

- 5.14 At 6.5%, the aggregate level of school revenue balances is considered to be higher than required to cover normal in-year variances against the budget and suggests that more money could have been spent in-year on key priorities. Within the overall total, as should be expected, a small number of schools are running deficits in order to implement financial change over the medium term, in a managed way.
- 5.15 In respect of capital grants, the majority of schools continue to secure total funding for a project from DFC before it commences, hence balances are in excess of annual funding allocations. With DFC funding having been reduced by approximately 80% from April 2011, schools will be undertaking much lower value projects in the future and will therefore need to carefully consider which are their highest priority projects.
- 5.16 Overall, schools continue to show resilience to the difficult economic climate and the impact of the national funding reforms which indicates good cost control and financial planning.

6 ADVICE RECEIVED FROM STATUTORY AND OTHER OFFICERS

Borough Solicitor

- 6.1 The relevant legal provisions are contained within the body of the report.

Borough Treasurer

6.2 The financial implications of the report are outlined in the supporting information.

Equalities Impact Assessment

6.3 There are no specific impact assessments arising from this report.

Strategic Risk Management Issues

6.4 There are no specific strategic risk management issues arising from this report

Other Officers

6.5 There are no issues arising from this report that are relevant to other officers.

7 CONSULTATION

Principal Groups Consulted

7.1 Not applicable, applying statutory regulations.

Method of Consultation

7.2 Not applicable.

Representations Received

7.3 Not applicable.

Background Papers

School Balances from BFC final accounts for 2012-13
Scheme for Financing Schools

Contact for further information

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2012-13 School Revenue Balances

School	2012-13 Budget	Carry forward					Significant surplus - initial calculation	Significant surplus - after MFG adjustment
		Total Amount	Percentage of total Budget	Change from 2011-12	Percentage of total Budget last year	Change in Percentage of total Budget		
Ascot Heath Infant	£758,956	-£23,312	-3.07%	£8,623	-4.41%	1.33%	£0	£0
Ascot Heath CE Junior	£897,348	-£61,439	-6.85%	£1,559	-7.27%	0.42%	£0	£0
Binfield CE Primary	£1,337,609	-£43,700	-3.27%	-£42,640	-0.08%	-3.19%	£0	£0
Birch Hill Primary	£1,570,017	-£105,447	-6.72%	£16,067	-7.98%	1.26%	£0	£0
College Town Infant & Nursery	£885,103	-£57,151	-6.46%	£11,140	-7.22%	0.77%	£0	£0
College Town Junior	£974,925	£15,985	1.64%	£16,224	-0.02%	1.66%	£0	£0
Cranbourne Primary	£708,466	£20,288	2.86%	-£8,420	4.41%	-1.55%	£0	£0
Crown Wood Primary	£1,401,637	-£184,647	-13.17%	-£78,795	-9.01%	-4.16%	-£72,516	£0
Crowthorne CE Primary	£819,502	-£40,616	-4.96%	£3,588	-5.74%	0.78%	£0	£0
Fox Hill Primary	£878,913	-£71,767	-8.17%	-£33,943	-4.86%	-3.30%	-£1,454	£0
Great Hollands Primary School	£1,525,948	-£51,450	-3.37%	£28,240	-5.15%	1.78%	£0	£0
Harmanswater Primary	£2,863,159	-£482,237	-16.84%	£7,378	-19.16%	2.32%	-£253,184	£0
Holly Spring Infant	£951,089	-£64,011	-6.73%	-£31,996	-3.62%	-3.11%	£0	£0
Holly Spring Junior	£992,931	-£80,353	-8.09%	£48,801	-13.57%	5.48%	-£919	-£919
Jennets Park Primary School	£894,398	-£27,217	-3.04%	£8,105	-6.68%	3.63%	£0	£0
Meadow Vale Primary	£1,964,118	-£85,596	-4.36%	£39,230	-6.72%	2.37%	£0	£0
New Scotland Hill Primary	£816,064	-£17,068	-2.09%	£8,193	-3.18%	1.09%	£0	£0
Owsmoor Primary	£1,834,151	-£96,390	-5.26%	£55,760	-9.00%	3.74%	£0	£0
The Pines School	£958,107	-£134,850	-14.07%	-£24,922	-12.49%	-1.59%	-£58,201	£0
Sandy Lane Primary	£2,368,395	-£376,004	-15.88%	-£129,946	-11.67%	-4.21%	-£186,532	£0
St Joseph's Catholic Primary	£887,085	-£57,159	-6.44%	£10,789	-7.94%	1.50%	£0	£0
St Margaret Clitheroe Primary	£797,694	-£41,742	-5.23%	-£12,205	-3.75%	-1.48%	£0	£0
Winkfield St Mary's CE Primary	£725,505	-£9,007	-1.24%	£512	-1.34%	0.10%	£0	£0
St Michaels Easthampstead	£906,012	-£58,141	-6.42%	-£10,055	-5.75%	-0.67%	£0	£0
St Michaels CE Primary, Sandhurst	£812,942	-£60,463	-7.44%	£32,009	-11.86%	4.42%	£0	£0
Uplands Primary	£784,113	-£19,156	-2.44%	£8,965	-3.61%	1.17%	£0	£0
Warfield CE Primary	£813,554	-£55,537	-6.83%	-£26,834	-3.67%	-3.16%	£0	£0
Whitegrove Primary	£1,565,229	-£88,644	-5.66%	-£6,233	-5.51%	-0.15%	£0	£0
Wildridings Primary	£1,504,467	-£222,076	-14.76%	-£41,226	-14.44%	-0.32%	-£101,719	£0
Broadmoor Primary	£803,338	-£11,054	-1.38%	£62,663	-9.63%	8.25%	£0	£0
Woodenhill Primary & Nursery	£1,417,915	-£106,474	-7.51%	£35,253	-10.41%	2.90%	£0	£0
College Hall PRU	£849,187	-£101,931	-12.00%	-£6,162	-11.02%	-0.99%	-£33,996	-£33,996
The Brakenhale	£5,113,593	-£95,356	-1.86%	-£31,633	-1.29%	-0.57%	£0	£0
Easthampstead Park	£4,901,058	-£362,346	-7.39%	£31,016	-8.00%	0.61%	-£117,293	-£117,293
Edgbarrow	£6,241,037	-£307,488	-4.93%	£65,937	-6.32%	1.39%	£0	£0
The Garth Hill	£7,424,771	-£689,416	-9.29%	-£133,904	-7.62%	-1.66%	-£318,177	-£318,177
Sandhurst	£5,203,792	-£242,241	-4.66%	£23,145	-5.12%	0.46%	£0	£0
Kennel Lane	£3,944,697	-£78,032	-1.98%	£149,433	-6.00%	4.02%	£0	£0
Total	£70,096,825	-£4,573,245	-6.52%	£53,716	-6.93%	0.40%	-£1,143,992	-£470,385

Unrestricted

Annex B

Summary profile of deficit and surplus school balances

Sector	2011-12		2012-13		Change in carry forward 2011-2012 to 2012-2013	2012-13 Carry Forward as % of final budget	
	Final Budget	Carry Forward	Final Budget	Carry Forward			
Primary and PRU	£34,774,522	£2,748,088	£37,267,877	£2,798,366	£50,278	1.83%	7.51%
Secondary and Special	£32,030,278	£1,878,873	£32,828,948	£1,774,879	-£103,994	-5.53%	5.41%
Total	£66,804,800	£4,626,961	£70,096,825	£4,573,245	-£53,716	-1.16%	6.52%

Analysis of level of Reserves										Memo Item Surpluses Over £75,000
Deficits		Surpluses					Significant Surpluses			
No.	Largest	No.	Largest	No. 0-5% of budget	No. 5-8% of budget	No. > 8% of budget	No.	Largest		
2011-12										
Primary and PRU	1	£28,708	31	-£489,615	10	10	11	11	-666,025	14
Secondary and Special	0	£0	6	-£555,512	1	4	1	5	-460,646	5
Total	1	£28,708	37	-£4,655,669	11	14	12	16	-1,126,671	19
2012-13										
Primary and PRU	2	£20,288	30	-£482,237	10	12	8	8	-708,521	12
Secondary and Special	0	£0	6	-£689,416	4	1	1	2	-318,177	6
Total	2	£36,273	36	-£4,609,518	14	13	9	10	-1,143,992	18
Change 2011-2012 to 2012-2013										
Primary and PRU	1	-£8,420	-1	£7,378	0	2	-3	-3	-£42,497	-2
Secondary and Special	0	£0	0	-£133,904	3	-3	0	-3	£142,469	1
Total	1	£7,565	-1	£46,151	3	-1	-3	-6	-£17,321	-1

2012-13 School Capital Balances

School	2012/13 new year funding	Carry forward			Amount that must be spent by 31 Aug 2013
		Total Amount (-surplus / + deficit)	Percentage of new year funding	Change from 2011/12 (-increase / +decrease)	
Ascot Heath County Infant	£6,273	-£28,386	-452.54%	£36,876	£15,750
Ascot Heath CE Junior	£6,666	-£5,319	-79.79%	£57,272	£0
Birch Hill Primary	£8,601	-£41,105	-477.89%	£32,331	£24,032
Wildmoor Heath Primary	£6,003	-£8,930	-148.78%	£13,463	£0
College Town Infant and Nursery	£6,953	-£9,118	-131.14%	£2,368	£0
College Town Junior	£7,195	-£4,674	-64.97%	£5,882	£0
Cranbourne Primary	£6,093	-£6,081	-99.81%	£3,732	£0
Crown Wood Primary	£7,279	-£35,922	-493.47%	£26,278	£21,341
Crowthorne CE Primary	£6,289	-£4,462	-70.94%	£29,116	£0
Fox Hill Community Primary	£6,031	-£7,506	-124.47%	£8,482	£0
Great Hollands Primary	£8,039	-£4,966	-61.77%	£31	£0
Harmanswater Primary	£11,268	-£11,268	-100.00%	-£85	£0
Holly Spring Infant and Nursery	£6,430	-£8,665	-134.76%	£14,940	£0
Holly Spring Junior	£6,486	-£7,331	-113.02%	£11,407	£0
Meadow Vale Primary	£9,113	-£35,874	-393.66%	-£9,113	£17,659
New Scotland Hill Primary	£6,436	-£12,250	-190.35%	-£6,016	£0
Owlsmoor Primary	£9,361	-£8,373	-89.45%	-£6,611	£0
Pines	£6,183	-£12,313	-199.17%	£44,224	£0
Sandy Lane Primary	£10,289	-£3,422	-33.26%	£916	£0
St Marys CE Primary (Winkfield)	£6,222	-£10,047	-161.48%	£23,384	£0
Uplands Primary	£6,340	£5,163	81.44%	£8,776	£0
Warfield CE Primary	£6,363	-£10,526	-165.44%	-£6,363	£0
Whitegrove Primary	£8,860	-£1	-0.01%	£45,740	£0
Wildridings Primary	£7,549	-£1	-0.01%	£34,113	£0
Woodenhill Primary and Nursery	£7,960	-£13,506	-169.67%	£16,835	£0
Brakenhale	£20,116	-£27,036	-134.40%	£14,285	£0
Easthampstead Park	£19,069	-£31,406	-164.69%	£2,343	£0
Edgbarrow	£24,469	-£5,299	-21.65%	£4,465	£0
Garth Hill	£27,304	-£41,215	-150.94%	-£7,958	£0
Sandhurst	£22,259	-£17,340	-77.90%	£16,231	£0
Kennel Lane	£9,940	-£12,200	-122.73%	-£9,940	£0
College Hall PRU	£5,215	-£23,723	-454.90%	£17,474	£12,989
Total	£312,652	-£443,101	-141.72%	£424,879	£91,771

**TO: SCHOOLS FORUM
12 SEPTEMBER 2013**

**THE SCHOOLS BUDGET – 2013-14 BUDGET MONITORING
AND OTHER FINANCIAL MATTERS
(Director of Children, Young People and Learning)**

1 PURPOSE OF REPORT

- 1.1 The purpose of this report is for the Schools Forum to:
- i. Endorse budget transfers proposed for 2013-14;
 - ii. Receive an update the 2013-14 forecast budget monitoring position for the Schools Budget;
 - iii. Agree loan requests received from schools, and;
 - iv. Agree changes to the criteria for in-year budget allocations to schools experiencing significant growth in pupil numbers.

2 RECOMMENDATIONS

That the Schools Forum:

- 2.1 **NOTES** the budget variances being forecast on the 2013-14 Schools Budget that in total aggregate to a net under spending of £0.251m, which increases to £0.646m when unallocated year end balances are also taken into account (paragraph 5.6);
- 2.2 **RECOMMENDS** to the Executive Member that the required budget transfers between Pupil behaviour, SEN provisions and support services and Education out of school are **AGREED** (paragraph 5.3);
- 2.3 **AGREES** that due to on-going uncertainties, the use of any under spend forecast for 2013-14 is considered in January 2014 when the 2014-15 budget is agreed (paragraph 5.9);
- 2.4 **AGREES** the loan requests for Wildmoor Heath Primary and Sandhurst Secondary Schools (paragraph 5.11);
- 2.5 **AGREES** the updated criteria for in-year budget allocations to schools experiencing significant growth in pupil numbers, as set out in Annex B (paragraph 5.16).

3 REASONS FOR RECOMMENDATIONS

- 3.1 It is appropriate for the Schools Forum to be aware of, and where relevant, comment on these financial matters.

4 ALTERNATIVE OPTIONS CONSIDERED

- 4.1 Where relevant, these are set out in the supporting information.

5 SUPPORTING INFORMATION

2013-14 Monitoring of the Schools Budget

Approved budget

- 5.1 Based on recommendations of the Schools Forum, in March 2013, the Executive Member for Children, Young People and Learning agreed a Schools Budget for 2013-14. Subsequent to this initial approval, at the last Forum meeting in June it was reported that the level of Dedicated Schools Grant (DSG) to be received from the Department for Education (DfE) had been adjusted so that a deduction of £3.503m would be made to pay Ranelagh Academy the budget share due from the BF Funding Formula, with a further net deduction of £0.371m for transferred Special Educational Needs (SEN) funding responsibilities, making a net reduction in funding of £3.874m and a revised DSG income of £74.991m.
- 5.2 To ensure budgets correctly reflect anticipated spending requirements, adjustments would be made to the areas of the accounts that these changes relate to. As the reduction in DSG is in response to reduced funding responsibilities, these changes should not have a significant financial impact on the Schools Budget.
- 5.3 In reviewing the budget, it has become apparent that £0.050m of costs currently charged to Pupil Behaviour relates to management and staff time directed at other targeted services and should be recorded as £0.030m in SEN provisions and support services and £0.020m in Education out of school. Provisions within the Council's Financial Regulations require the Executive Member to agree a relevant budget transfer, and the Forum is recommended to propose that the change is agreed.

Forecast budget variances

- 5.4 As part of the Council's Financial Regulations, the Schools Budget is subject to monthly budget monitoring. This involves forecasting likely expenditure and income through to the end of the year, identification of reasons for variations against original budgets, and where relevant, setting out options for management action. This process allows for a forecast year end level of balances to be calculated.
- 5.5 It is appropriate for the Forum to be aware of the current forecast year end balance as this may need to be taken into account when the 2014-15 budget is agreed. It is also possible that a number of variances identified this year will be on-going, and will therefore need to be addressed in next year's budget.
- 5.6 Provisional budget monitoring information available at the end of July indicates that the Schools Budget will under spend by £0.251m this year. This forecast variance comprises an over spend of £0.071m against approved budget allocations and net under spendings of £0.322m. After taking account of the potential ear marked carry forward of £0.082m to support childcare for the most disadvantaged 2 year olds (see note viii below), and the unallocated

£0.477m under spend brought forward from 2012-13, there is a potential year end under spending of £0.646m.

Brief explanations of the significant changes anticipated from the current budget plan are set out below, with Annex A showing the full Schools Budget at a summary level.

- i. **SEN provisions and support services – Nil variance.** April 2013 saw the introduction of funding reforms in the Schools Budget and this has in particular resulted in significant changes in arrangements for funding SEN. Due to these changes, insufficient information is currently available to provide a robust forecast of likely expenditure, and therefore no variances are being reported on SEN at this time. This also takes account of imminent pupil placement changes that will occur for the start of the new academic year and where a number of decisions have yet to be taken on final placements.
- ii. **Education out of school - £0.001m over spend.** A small saving on staffing costs is anticipated from general staff turnover.
- iii. **Pupil behaviour - £0.013m under spend.** Temporary staff vacancies will result in a saving of £0.007m, with £0.004m additional income expected from external users of the Pines Professional Centre. A small number of other minor variances are also anticipated..
- iv. **School staff absence and other items - £0.032m under spend.** There is expected to be a £0.015m over spend in the School Admissions Team where additional staff have needed to be recruited to cover long term sickness and maternity leave absences. This has been offset by an expected saving of £0.032m on official school staff absences, such as maternity leave, and a £0.020m saving on the anticipated charge for Carbon Reduction Commitment. There are also a number of other minor variances.
- v. **Combined Service Budgets - £0.019m under spend.** A £0.017m saving will be achieved on the SLA with the Margaret Wells Furby Children's Resource Centre which provides support and advice to disabled children and their families including medical support, occupational therapy, physiotherapy, speech and language therapy and parent support groups as a result of requiring less services than allowed for in the budget. There are a small number of other variances also.
- vi. **Early Years provisions and support services - £0.088m under spend.** 2013-14 DSG included two year funding to develop and maintain the additional places required to meet the new statutory duty for the most deprived 2 year olds to receive 15 hours a week free childcare. At this stage £0.082m is expected to be unspent at year end and is expected to be subject to a carry forward request for the funds to be made available in 2014-15. There are a small number of other variances also.
- vii. **Support to schools in financial difficulty - £0.100m under spend.** There is no clear indication of spend against this £0.283m budget, with only one school having contacted CYPL requesting additional support, of which £0.030m has been approved by the Director under delegated powers set out in the policy agreed by the Forum. Further financial support will be required to schools in danger of entering or just exiting Ofsted categories although precise amounts are unclear at this stage. This can be a volatile budget.

- viii. **Potential earmarked carry forward on 2 year olds - £0.082m reduction in under spend.** As set out above in note vi, the 2013-14 DSG included two year funding in respect of supporting the new statutory duty to provide 15 hours free childcare support to the most deprived 2 year olds. In setting the budget for 2013-14, the Forum agreed that subject to there being a sufficient overall year end surplus balance on the Schools Budget, that any under spend against the 2 year old element of the DSG would be carried forward on a ring fenced basis to 2014-15 for use to support successful delivery of the programme. As current budget forecasts suggest this requirement will be met, an appropriate adjustment has been made to the overall outturn forecast.

Post 16 SEN Grant Funding

- 5.7 As set out above in paragraph 5.5 (i), due to the on-going uncertainty surrounding spend against SEN budgets, the budget monitoring report excludes any potential variances on SEN budgets. Members of the Forum will recall from the last meeting that it was reported that with effect from August 2013, Kennel Lane Special School (KLS) will be funded for post 16 SEN students in the same way as secondary schools, with an earmarked grant allocation paid by the EFA which LAs must “passport” on to relevant schools, with the relevant amount confirmed at £0.409m. As the original budget for KLS was set at the level needed to cover full costs and was fully funded from DSG, passing this grant to the school allows for an equivalent reduction to be made in funding from DSG without impacting of income received by KLS. This additional income provides a funding buffer should there be an over spending on SEN costs, or other areas of expenditure.

Proposed use of forecast under spending

- 5.8 When the Schools Budget under spends, the DfE allows LAs and School Forums to consider the following options for use of the DSG.
1. Carry forward funding into the following financial year;
 2. Increase individual school budgets in the current year;
 3. Increase centrally managed expenditure in the current year.
- 5.9 At this early stage of the year, when a number of budget decisions have yet to be taken and trends fully established that can be projected for the year with confidence, in particular in relation to SEN services, it is not considered appropriate to allocate any of the forecast surplus to schools or budgets that support schools. There will be more certainty around projections at the end of the autumn term. Furthermore, in light of the expectation that the Schools Budget will continue to face tight financial settlements in future years, together with the uncertain impact from the school funding reforms, and the potential outcomes from the Council’s job evaluation exercise, it is not considered appropriate to make any decisions at this time. Proposals on the use of any forecast year end balance are therefore recommended to be taken in January alongside budget proposals for 2014-15.

Loan requests

- 5.10 There are circumstances where schools may experience budget difficulties or wish to undertake significant capital projects and in order for the school to continue to function effectively, a temporary overspend of budget allocation may be desirable. The Scheme for Financing Schools has provisions to allow for this through loan arrangements (formerly licensed deficits) which provide for a short term loan advance so that schools have sufficient time to manage expenditure reductions or receive additional income that demonstrate the ability to fully repay any over spending within an agreed period. Both the Schools Forum and Executive Member for Children, Young People and Learning need to agree loan requests.
- 5.11 At its meeting in June, the Forum agreed a loan request from Ascot Heath Infant School but was not quorate to agree the request from Wildmoor Heath due to a declared interest by a Forum member. Subsequent to that meeting, a loan request has been received from Sandhurst Secondary School. Details of each application requiring approval are set out below, all of which have been agreed by the Executive Member.

Wildmoor Heath Primary School

- 5.12 Wildmoor Heath Primary School has recently exited Special Measures and is making good progress. In the short term, to support specific activities on the action plan, it is expected that under the approved delegated powers from the Schools Forum, the Director will agree additional financial support that will not need to be repaid. In terms of the school's core budget, a review has identified a small shortfall between income and planned spend for 2013-14 of £0.015m which a medium term budget plan has demonstrated can be fully repaid by 31 March 2017 through additional budget allocation from the BF Funding Formula as pupil numbers increase from 163 to a forecast 175 during the period of the loan request.

Sandhurst Secondary School

- 5.13 Sandhurst Secondary School has requested a loan of £0.075m to be fully repaid by 31 March 2018 to allow for the purchase of a lease for two classrooms and office space located at Sandhurst School that is currently occupied by Bracknell and Wokingham College. This will allow the school to use the additional space in September 2013 for SEN support and drama and in the longer term to provide a new Sixth Form Centre, as well as providing a much needed reception area near the school car park. The school is aware that this loan will attract interest.

Update to the criteria used to award in-year budget allocations to schools experiencing significant increases in pupil numbers

- 5.14 School budgets for each financial year must be set on the basis of the number of pupils on roll at the preceding October. To adequately resource schools that experience a significant increase in pupil numbers at the start of the next academic year, thereby needing to recruit additional staff, the DfE allows LAs to retain a contingency to allocate to schools once relevant data is available. In order to ensure that any funding held for such a purpose is always allocated to schools, should there be an under spending on this budget, the

DfE requires the relevant amount to be allocated into individual school budgets in the next financial year.

- 5.15 The Forum has previously agreed criteria that should be applied to determine whether a school needs additional financial support as a result of an increase in pupil numbers, which generally allocates funds when the number on roll increases by at least 20 pupils and a budget of £0.322m has been set aside for this purpose. Taking account of the rapid increase in school population, and the need to create at short notice a number of surge classes that can accommodate up to 30 pupils, a change to the current criteria is proposed. The proposal is to exclude any pupils admitted to the surge class from the calculation of the change in pupil numbers at a school and to automatically fund the assessed cost of a teacher at any school that agrees to a surge class, thereby removing any financial risk to the school, should actual pupils admitted be below the 20 threshold that has been set to determine current top up funding.
- 5.16 The criteria proposed to be used to award in-year budget allocations to schools experiencing a significant in-year increase in pupil numbers is set out at Annex B, which the Forum is recommended to agree.

6 ADVICE RECEIVED FROM STATUTORY AND OTHER OFFICERS

Borough Solicitor

- 6.1 The relevant legal provisions have been considered within the main body of the report.

Borough Treasurer

- 6.2 The financial implications arising from this report are set out in the supporting information.

Equalities Impact Assessment

- 6.3 There are no specific impacts arising from this report..

Strategic Risk Management Issues

- 6.4 There are no specific strategic risk management issues arising from this report.

7 CONSULTATION

Principal Groups Consulted

- 7.1 Not applicable.

Method of Consultation

- 7.2 Not applicable.

Representations Received

7.3 Not applicable.

Background Papers

Provisional July budget monitoring report

Contact for further information

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BUDGET MONITORING STATEMENT FOR THE SCHOOLS BUDGET - JULY 2013							
	Approved Budget			Estimated Variance			Note
	Expenditure	Income	Net	Under spending	Over spending	Net variance	
	<i>£000</i>	<i>£000</i>	<i>£000</i>	<i>£000</i>	<i>£000</i>	<i>£000</i>	
<u>Delegated and devolved funding</u>							
Delegated School Budgets	64,084	0	64,084	0	0	0	
Other School Grants	0	-4,163	-4,163	0	0	0	
	64,084	-4,163	59,921	0	0	0	
<u>LEA managed items</u>							
SEN provisions and support services	8,157	-969	7,188	0	0	0	i
Education out of school	1,094	-3	1,091	0	1	1	ii
Pupil behaviour	441	-7	434	-15	2	-13	iii
School staff absence and other items	1,517	-20	1,497	-55	23	-32	iv
Combined Service Budgets	690	0	690	-36	17	-19	v
Early Years provisions and support services	3,886	0	3,886	-116	28	-88	vi
Support to schools in financial difficulty	285	-1	284	-100	0	-100	vii
	16,070	-1,000	15,070	-322	71	-251	
Dedicated Schools Grant	0	-74,991	-74,991	0	0	0	
Potential earmarked carry forward on 2 year olds				82	0	82	viii
TOTAL - Schools Budget	80,154	-80,154	0	-240	71	-169	
Unallocated balance at 1 April 2013						-517	
Transfer to School Meals Re-Tendering Reserve as agreed in June						40	
Net unallocated funds forecast for 31 March 2014 - excluding impact from SEN						-646	

See paragraph 5.6 for an explanation to the notes.

Proposed criteria for making allocations from the Schools Contingency

1. Criteria for in-year budget allocations to schools experiencing significant growth in pupil numbers

The School Specific Contingency shall include funding for an allocation to those schools that experience exceptional increases in pupil numbers between the October census used for funding original budgets and actual pupil numbers on roll on the following October census

To assist schools in meeting the additional costs arising in such circumstances, an in-year budget addition will be made where the whole school number on roll from Reception up to Year 11 increases up to the point that a new teacher needs to be appointed. An increase of 20 pupils has been established as the relevant threshold point at which additional funding would be allocated. A second allocation would be made should numbers increase by 40 and so on, with further funding allocations for each additional increase above the 20 threshold.

The amount of additional funding is calculated from the cost of appointing a teacher on Mainscale Point 6 – salary and employer on-costs - for the period September to March.

There is one exception to this general rule. ~~When a school is funded on the basis of estimated actual costs, which is ordinarily a new school or one that opens additional forms of entry during a financial year, it will not be entitled to any in-year growth allowances, provided funds for the additional costs that will arise from a planned significant in year increase in pupil numbers are allocated from an alternative source.~~ **This relates to schools that agree with the LA to open a 'surge' class – i.e. one additional class to accommodate up to 30 additional pupils – where additional funding will be allocated irrespective of the actual number of pupils admitted, if the pupils in the 'surge' class are admitted after the census used for funding purposes. The funding allocation will be calculated in the same way as for general in-year growth, applied against the number of months the 'surge' class is open.**

The allocated funding may need to be scaled if demand significantly exceeds the budget allocation, with final decisions to be determined each year by the Schools Forum.

Additions to the policy are in **bold and underlined**.

Deletions to the policy have been ~~struck through~~. This relates to allocating additional funding to new schools, which in future is proposed to be funded through a de-delegated budget, as set out on a separate agenda item.

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