

NOTICE OF MEETING

Schools Forum

Thursday 19 October 2017, 4.30 pm

**Function Room, Fifth Floor, Easthampstead House, Town Square,
Bracknell**

To: The Schools Forum

Schools Members:

One Vacancy, Independent Chair
One Vacancy, Primary School Governors
One Vacancy, Secondary School Governor
One Vacancy, Academy Governor Representative
One Vacancy, Academy Governor Representative
Brian Fries, Secondary School Governor
Liz Cole, Primary School Representative
Jane Coley, Academy School Representative
Karen Davis, Primary Head Representative
Trudi Sammons, Primary School Representative
Grant Strudley, Primary Head Representative
Andrew Taylor, Primary School Governors
Keith Grainger, Secondary Head Representative
Debbie Smith, Secondary Head Representative
Rhona Stainthorp, Primary School Governors
Val Woods, Primary School Governors
Martin Gocke, Pupil Referral Unit Representative
Peter Floyd, Special School Representative

Non-Schools Members

Michelle Tuddenham, PVI Provider Representative
Dominic Asater, 14-19 Partnership Representative
One Vacancy, Diocese Representative (Church of England)
One Vacancy, Union Member

ALISON SANDERS
Director of Resources

EMERGENCY EVACUATION INSTRUCTIONS

- 1 If you hear the alarm, leave the building immediately.
- 2 Follow the green signs.
- 3 Use the stairs not the lifts.
- 4 Do not re-enter the building until told to do so.

If you require further information, please contact: Emma Young
Telephone: 01344 352269
Email: emma.young@bracknell-forest.gov.uk
Published: 11 October 2017

EMERGENCY EVACUATION INSTRUCTIONS

- 1 If you hear the alarm, leave the building immediately.
- 2 Follow the green signs.
- 3 Use the stairs not the lifts.
- 4 Do not re-enter the building until told to do so.

If you require further information, please contact: Emma Young
Telephone: 01344 352269
Email: emma.young@bracknell-forest.gov.uk
Published: 11 October 2017

Schools Forum
Thursday 19 October 2017, 4.30 pm
Function Room, Fifth Floor, Easthampstead House, Town Square,
Bracknell

Sound recording, photographing, filming and use of social media at meetings which are held in public are permitted. Those wishing to record proceedings at a meeting are however advised to contact the Democratic Services Officer named as the contact for further information on the front of this agenda as early as possible before the start of the meeting so that any special arrangements can be made.

AGENDA

Page No

1. Apologies for Absence/Substitute Members

To receive apologies for absence and to note the attendance of any substitute members.

2. Declarations of Interest

Members are asked to declare any disclosable pecuniary or affected interests in respect of any matter to be considered at this meeting.

Any Member with a Disclosable Pecuniary 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 Disclosable Pecuniary Interest is not entered on the register of Members interests the Monitoring Officer must be notified of the interest within 28 days.

Any Member with an affected Interest in a matter must disclose the interest to the meeting and must not participate in discussion of the matter or vote on the matter unless granted a dispensation by the Monitoring officer or by the Governance and Audit Committee. There is no requirement to withdraw from the meeting when the interest is only an affected interest, but the Monitoring Officer should be notified of the interest, if not previously notified of it, within 28 days of the meeting.

3. Minutes and Matters Arising

To approve as a correct record the minutes of the meeting of 14 September 2017.

4. Update to the Schools Forum Regarding the High Needs Block Funding Review

To receive an update regarding the High Needs Block Funding Review.

5 - 22

5. Proposals to revise the working arrangements of the Schools Forum

To receive proposals to revise the working arrangements of the Schools Forum.

23 - 26

6. Update on School and Education Funding

To receive an update on the School and Education Funding

27 - 52

7. **Dates of Future Meetings**

The dates of future meetings are:

7 December 2017

18 January 2018

22 March 2018

19 April 2018

TO: SCHOOLS FORUM
DATE: 19 OCTOBER 2017

**UPDATE TO THE SCHOOLS FORUM REGARDING
THE HIGH NEEDS BLOCK FUNDING REVIEW
Director, Children Young People and Learning**

1 INTRODUCTION

- 1.1 The High Needs Block review action plan was presented at Schools Forum on 13th July 2017.
- 1.2 The Schools Forum requested a regular update on the progress of implementing the High Needs Block recommendations.

2 SUPPORTING INFORMATION

- 2.1 The High Needs Block review was commissioned and completed in the last academic year. Four overarching recommendations were made and these were agreed in principle by the Council Corporate Management Team.
- 2.2 The key purpose of the review was to identify if the funding is being used appropriately, efficiencies that can be made to meet any potential reductions in funding and to re-invest in a new and improved Special Educational Needs system.
- 2.3 An action plan has been developed to implement these recommendations and this has been shared with School Forum for their information.
- 2.4 Local authorities should use their high needs budget to provide the most appropriate support package for an individual with SEND in a range of settings, taking account of parental and student choice, whilst avoiding perverse incentives to over-identify high needs pupils and students. High needs funding is also intended to support good quality alternative provision for pupils who cannot receive their education in schools.
- 2.5 As a function of making changes to the SEND system it is vital that this is undertaken collaboratively with schools, parents and young people. This partnership approach continues to develop with establishment of a multi-agency partnership improvement board that includes representation from schools, health, social care, parents/ carers and young people.
- 2.6 This action plan relates directly to the recommendations within the High Needs Block review. Whilst these are a key focus many form part of the wider transformation agenda for the Council.
- 2.7 The action plan and the key actions relate to deficits within the current system. It is important to remember that there are many positives within the current system as highlighted in the report and the current partnership Self Evaluation Form.
- 2.8 Key actions since last report on 13th July 2017:
 - SEN strategy group established and meeting regularly with representation from each phase of education.

- Rainbow resource relocation has been completed.
- Agreement with Ranelagh and Education and Skills Funding Agency reached regarding the resource unit resulting in recoupment of £132k,
- SEND strategy co-produced with partners, parents, young people and now being consulted upon,
- Partnership SEF completed with respect to implementation of the Code of Practice and inspection preparation.
- Greater Head teacher engagement in the SEN panel for Education, Health Care plan decisions.

3 EQUALITIES IMPACT ASSESSMENT

- 3.1 Not applicable at this point, but may be appropriate alongside the consultation process to address certain recommendations particularly where that results in changes to provision.

4 STRATEGIC RISK MANAGEMENT ISSUES

- 4.1 Potential financial risks are being mitigated through conducting this review and implementing actions. There is a risk of reputational damage by making changes to the way SEN funding is being used and this is being mitigated through extensive stakeholder involvement and a communication strategy which will highlight improvements in value for money and services better matched to local needs.

Additional Papers

High Needs Block review action plan

Contacts for further information

Ian Dixon Head of Targeted Services
01344 354194 Ian.Dixon@bracknell-forest.gov.uk

Frank Glennon Head of SEN and PEP
01344 354198 Frank.Glennon@bracknell-forest.gov.uk

Special Educational Needs

7

Headline High Needs Block Plan

May 2017 – August 2018

Background information

The DfE, with the Education Funding Agency (EFA), allocates the high needs funding block (HNFB): an element of the Direct Schools Grant (DSG) transferred to local authorities (LAs). The purpose of the HNFB is to fund the system to meet the educational needs of all children and young people resident in the LA with SEND high needs. The HNFB allocation for Bracknell Forest is the central focus of this headline plan.

Local authorities should use their high needs budget **to provide the most appropriate support package for an individual with SEND** in a range of settings, taking account of parental and student choice, whilst avoiding perverse incentives to over-identify high needs pupils and students. High needs funding is also intended to support good quality alternative provision for pupils who cannot receive their education in schools. Local authorities and institutions should collaborate on all aspects of high needs funding to develop more efficient ways of working and provide better outcomes for children and young people.

Pupils and students who receive support from local authorities' high needs budgets include:

- children aged 0 to 5 with SEND whom the local authority decides to support from its high needs budget; some of these children may have EHC plans, but this is not a requirement
- pupils aged 5 to 18 (inclusive of students who turn 19 on or after 31 August in the academic year in which they study) with high levels of SEND in maintained schools, academies, FE institutions, SPIs or other settings which receive top-up funding from the high needs budget; most, but not all, of these pupils will have either statements of SEN or EHC plans
- those aged 19 to 25 in FE institutions and SPIs who have an EHC plan and require additional support costing over £6,000; if aged 19 to 25 without an EHC assessment or plan, local authorities must not use their high needs budgets to fund these students;
- compulsory school-age pupils placed in AP by local authorities or schools

Bracknell Forest Council's Children's Services, in consultation with the local Schools Forum, commissioned a review to assess the current use of the High Needs Funding Block (HNFB) across their local special educational needs and disabilities (SEND) system and to make recommendations for the future. This is in response to projected financial pressures it is anticipated the HNFB budget faces in the future, as well as reviewing the financial robustness of the local system as it adapts to the new statutory arrangements under the Children and Families Act 2014 and the statutory SEND Code of Practice (DfE 2015).

The HNFB Review was carried out between April and November 2016, timed to inform strategic decision-making for 2017-18 onwards. Specifically, the scope for the Review was to report on:

- the effectiveness of the current school SEND system, and externally commissioned provision and how the HNFB is deployed in Targeted Services;
- emerging and future pupil and student demand;
- existing SEND provision funded from the HNFB and analyse against current and projected levels of need;

- options for better alignment of service provision to demand & potential for savings
- options for reinvestment of savings in an improved SEND system.

Special Educational Needs and Disabilities (SEND) is defined as a child or young person who has a learning difficulty or disability which calls for special educational provision to be made for him or her .

A child of compulsory school age or a young person has a learning difficulty or disability if he or she:

- has a significantly greater difficulty in learning than the majority of others of the same age,
- or
- has a disability which prevents or hinders him or her from making use of facilities of a kind generally provided for others of the same age in mainstream schools or mainstream post-16 institutions.

Consideration must be given that this review and subsequent plan focussed on current provision and processes. This is an ideal starting point however, as different strategies are developed for example, the SEN strategy and Learning Improvement Strategy, needs are explored and Government policy evolves together with the views of school staff, Parents/ Carers, children and young people the plan may need to change.

Individual plans for specific activities are maintained within their service area.

Co-production with colleagues, parent/ carers and Children & Young People is a theme throughout all activities.

Specific contextual factors impacting on SEN and HNB this year

There has been an upturn in the volume of requests for EHCP assessments received from schools and parents. This is not out of line with the trends being seen in other authorities, some of which are reporting a significant rise in the amount of statutory assessment requests received.

The delay in announcement following the DfE consultation on school and High Needs Block funding. This has potential implications for the negotiation of contracts with providers and allocation of resources. [Whilst announcement has now been made there is insufficient detail to fully check local calculation of allocations](#)

SEND area inspection – can take place at any time with one weeks' notice to the Local Authority. [RBWM has recently been inspected and their report published.](#)

Council transformation and the reshaping of CYPL. This will have a significant bearing on structure, systems and processes.

The development of Kings Academy Binfield – there is an SEN resource base identified within the construction however its designation has not been determined. This identification has potential implications on resource allocation until full commitments are known.

Status reporting

RED - There are significant issues with this action. The action requires corrective action and cannot be addressed by activity lead or through the transformation programme .

Amber – An issue is having a negative effect on the action but can be dealt with by the action lead.

Green – The activity is performing to plan

Not started – activity not due to start

Recommendation 1:**Increase the strategic leadership by the school sector across the SEND system**

- The views of headteachers are clear: they wish to see changes to the SEND system across the area and are willing to contribute to the strategic leadership of these developments.
- Many Local authorities (LAs) that have successfully adapted SEND provision to better meet need have achieved this through a strong partnership with local schools.
- Joint working with the schools' sector will help ensure there is more consistent provision of support to meet locally identified need.

Focus	Lead(s)	Activity	Status	Success criteria/ by when?
1.1 Establish a Bracknell Forest SEN Strategic Group that is a partnership between nominated head teachers and the council's Department of Children, Young People and Learning (CYPL). The Group should act as champions for a renewed vision for SEN.	SEN/ head teachers	<ul style="list-style-type: none"> • Invitations to participate sent • Date set • Initial meeting held • ToR agreed including purpose, 	Green	<ul style="list-style-type: none"> • Group with appropriate representation established by June 17. • SEN strategic group can evidence their influence on SEN strategy and policy By Oct 17 and ongoing
1.2 The SEN Strategic Group to have oversight of developing the local vision and a renewed SEND strategy and ensuring its implementation	SEN strategic group	<ul style="list-style-type: none"> • Engage consultant • Develop strategy • Consultation on strategy content • Business plan created • Key elements of strategy identified and reviewed at SEND strategy meetings • 	Green	<ul style="list-style-type: none"> • Group shapes the new strategy. • Strategy is agreed and implemented. New strategy in place Oct 17
1.3 <i>Consideration</i> of the appointment of an independent chair person, who has a strategic SEND track record, for the group's first year to ensure the work of the group is driven forward and the vision becomes established locally.	SEN strategic group	<ul style="list-style-type: none"> • Is an independent chair required? • Identify budget • Develop terms of engagement including role and remuneration • Identify Chair • Approach and appoint 	Amber	<ul style="list-style-type: none"> • Decision taken June 17 • Chair appointed Sep 17
Evidence/Achievements/ Next Steps				
1.1				

- Group now meeting regularly with active participation in shaping the SEND strategy and action plan. This plan will incorporate the actions from the High Needs Block review into the overarching SEN plan.

- A third of the secondary schools/ academies are now represented on the strategy group

1.2

- Consultant has been engaged and strategy co-produced with partners. Consultation is due to complete on 29th Sep 17
- This has been discussed with the group and discussion with primary heads association has taken place to *'determine how would you like to be able to answer the following question? How does the LA help identify and monitor children with SEND?'* Feedback has been used to shape the strategy and plan.
- Work continues with the Parent/ Carer forum with regular meetings and polling views.
- Meetings established with youth council to co-produce the SEN strategy.

1.3

- Strategic group agreed that recommendation of an independent chair was appropriate and would enhance the authority and outputs of the group.
- Potential independent Chair has been identified and showed interest in taking on this role
- Terms of engagement currently being developed.

Recommendation 2:

Strong, coordinated local authority leadership for the planning of SEND provision, including place numbers, funding and commissioning

- Bracknell Forest Council and specialist providers to work together to adapt current send provision to more closely match demand
- The Review has identified a mis-match between some commissioned specialist places and likely demand, whilst, at the moment, there is no clear mechanism to formally amend specialist place numbers.
- The current scale, resource level and premises for College Hall undermines its viability as a standalone alternative provision that offers sufficient quality of education and learning for its vulnerable students, both those in the PRU and accessing home tuition.
- Bracknell Forest places a significant number of children in out of area placements: 103 pre-16 pupils in 2015/16. Pre-16 placements are considered carefully via the SEND Panel and efforts have resulted in there being a downward trend in numbers placed over the past three years.
- High-cost, out-of-area SEND placements are a major financial commitment: £3,314,895 from the HNFB in 2015-16 and it is not unusual for the 'school career' costs for a student to be in excess of £500,000

Focus	Lead(s)	Activity	Status	Success Criteria/ By when?
13 2.1 Kennel Lane School:	Head of SEN	<ol style="list-style-type: none"> 1. Kennel Lane School to work with BFC officers to remodel its provision, informed by more detailed modelling of future, medium term SEND demand, in terms of numbers and primary needs. 2. Establish an early assessment resource for reception and year 1 children that offers dual placement for up to two terms, with the pupil's mainstream primary within existing resources. <ol style="list-style-type: none"> a. A clear assessment protocol to be developed to ensure that parents understand that the places are not permanent. 3. Kennel Lane School work with BFC officers to review the current, limited, bands for top-up funding for higher need pupils. 4. Conduct an appraisal, involving the Head of SEN and the school's leaders, of the potential to establish a partnership for the school to apply to the EFA to become a special post-16 institution (SPI). 	Amber	<ul style="list-style-type: none"> • Early opportunities classes, incorporating a specialist nursery in place by Sep 17. • A multidisciplinary panel oversees decisions in the development of this and thereafter decisions around entry/exit criteria and specific child placements. Sep 17 • KLS/LA agree a broadening of Bands 4&5 to create a more streamlined top-up funding model. February 2018. • SPI appraisal complete. Mar 18
2.2. Resource centres:	Head of SEN	<ol style="list-style-type: none"> 1. All resource centres should have an outcome-based service level agreement (SLA). 2. Financial models for each resource centre 	Amber	<ul style="list-style-type: none"> • Outcome based contracts in place with each resource centre. Sep 17

14		<p>should developed and available for scrutiny by the SEN strategic group</p> <ol style="list-style-type: none"> 3. Each resource centre should produce an annual report that demonstrates improving pupil outcomes as a result of placement in the provision. 4. Agreement should be reached with Ranelagh School to close its resource centre that has operated well below capacity for some time. 5. The resource centre at Meadow Vale Primary School should have its designation extended to provide specialist support for primary age children with ASD as well as some of the more complex children with SLCN it currently supports. 6. The RISE@GHC should be closely monitored to ensure that it is providing a service for the nature of pupils anticipated and that projected HNB savings are on track. 7. Rainbow resource will be reviewed with potential relocation following the inadequate judgement at GHPS and subsequent academy order 		<ul style="list-style-type: none"> • Regular monitoring meetings established for each provision Sep 17 • Annual reports completed by each resource detailing finances, pupil profiles/ outcomes, staffing July 18 • Agree and implement internal audit recommendations with each resource provision by December 2017. • Agreement reached with Ranelagh June 17 • Agreement reached with Meadow Vale. Apr 18 • RISE@GHC has regular attendance at management group by head of SEN. May 17 • RISE@GHC. Review of nature of provision, pupil profiles and finances completed Mar 18 • Rainbow resource reviewed and process completed by October 2017.
2.3 College Hall:	Head of Targeted Services	<ol style="list-style-type: none"> 1. Consider the following options for future PRU and home tuition provision, in consultation with the SEND Strategic Group, either: <ol style="list-style-type: none"> a. Reach agreement with one local secondary to take over College Hall and its services and remodel and update the alternative provision, in agreement with the LA and in consultation with other local secondary schools 	Green	<ul style="list-style-type: none"> • PRU/ AP offer meets the needs of our schools and CYP. Aug 18 • Secondary head teachers briefed on the recommendations made and views sought. May 2017 • Secondary head teachers collectively consider recommendations June 17

- b. Reach agreement with all the local secondary schools for the responsibility for alternative provision to be shared between them and to reach a decision about the best arrangements for home tuition; or
 - c. Reach agreement with another provider, such as an outstanding PRU in a neighbouring local authority or with a multi-academy trust, to agree to be commissioned to deliver College Hall's alternative provision.
2. Consult with secondary schools in Bracknell Forest about their responsibilities and role in providing alternative provision.
 3. Conduct needs analysis for AP place requirement.
 4. Review service functions and if required, incorporate home tuition and outreach SLAs into the over-arching SLA
 5. Contract agreed with the identified provider, containing effective monitoring arrangements and an outcome-focused performance management framework.
 6. Review the need, capacity and referral pathway for home tuition.
 7. The LA, with the support of the SEND Strategic Group, should ensure all mainstream schools are fully meeting their statutory responsibilities for excluded pupils.
 8. Establish a clearly defined referral process for the PRU, with a pupil having been subject to two permanent exclusions being a pre-requisite.

- Agreement reached on the principles upon which alternative provision will be delivered Dec 17
- Provision needs and potential volumes identified Oct 17
- Contracts/ SLA's in place to meet need Apr 18
- Explicit pathway with agreed criteria in place in line with agreed principles. Dec 17

<p>2.4 Partnership with the main NMSS providers:</p>	<p>Head of SEN</p>	<ol style="list-style-type: none"> 1. Establish a partnership arrangement with each of the two main NMSS providers, High Close School and Chilworth House School, to: <ol style="list-style-type: none"> a. develop closer management of support for pupils who show the potential to move back to local provision and innovative arrangements piloted, such as what transitional support could be funded from the NMSS to facilitate this; b. ensure forward planning of future demand for places from Bracknell Forest with these schools; c. agree a framework for payments and service contracts for places taken by pupils from Bracknell Forest. 2. Ensure there are adequate contracts in place for all out-of-area placements and move away from the current “spot purchase” commissioning arrangement. 	<p>Green</p>	<ul style="list-style-type: none"> • Partnership agreements in place Apr 18 • Clear review processes identified for reviewing potential to move back to local provision. Apr 18 • Payment framework agreed. Apr 18 • Outcome focused contracts in place for all out of area placements. Apr 18
<p>2.5 Approval processes and placement reviews</p>	<p>SEN</p>	<ol style="list-style-type: none"> 1. Develop, agree and publish a new approval process for high cost placements with defined threshold and nominated approving officer. 2. Assess all current out-of-area placements in independent and NMSS schools to identify those pupils with the greatest potential for future move back into Bracknell Forest provision. 3. For those with the most potential, there should be early consultation and discussion with parents / carers as part of assessing the time-frame for their child’s return to local provision. 4. Social care colleagues should assess all key transition annual reviews (years 9, 11 and 13) to prepare for adulthood and for services to be provided through community social care rather than educational organisations. 	<p>Not Started</p>	<ul style="list-style-type: none"> • Approval process agreed. Apr 18 • Interim approval process agreed with DMT. Aug 17 • Officers attend annual reviews and make recommendations to SEN Panel about suitable candidates for reintegration to LA provision. January 2017. • Agreement in place with Social Care regarding preparing for adulthood services. Mar 18

<p>2.6 Robust joint commissioning arrangements for SEND should be developed; these should start with joint planning for 14 – 25 year olds</p>	<p>The Head of SEN and the CCG</p>	<ol style="list-style-type: none"> 1. Bracknell Forest Council and partners update the existing joint approach to commissioning (BFC 2013). 2. Establish strategic arrangements for joint commissioning initially focussing on joint planning for all young people with an ECHP or statement from age 14, as learners move towards adulthood. 3. Progress towards an EHCP should be monitored and quality assured by a strategic joint commissioning body with representation from health, education and social care. 4. Involvement of the young person and their parents or carers throughout the process 	<p>Not Started</p>	<ul style="list-style-type: none"> • Updated framework developed/ updated by approaching adulthood panel and agreed by December 2017. • Strategic group provides governance to EHCP process by Jan 18
<p>Achievements/ Next Steps</p>				
<p>2.1</p>	<p>17</p>	<ul style="list-style-type: none"> ○ A successful pilot involving 5 Reception pupils who availed of ‘Early opportunities’ places in KLS’ Foundation Stage department took place in 2016-17 academic year. 4 pupils remaining at KLS and will have an EHCP; one is able to return to his designated primary school for year 1. ○ There remains a strong commitment from the LA and KLS to the principle of the Early Opportunities places. ○ A group consisting of professionals from the LA (e.g. SEN, Early Help, EPS), the CDC, health (e.g. SALT) and KLS will be set up to drive forward the EO classes and the concept of a specialist nursery at KLS. ○ Key issue to be addressed is the funding of places and developing a robust SLA between the LA and the school. KLS currently do not agree that £5000 additional top up per place is sufficient funding despite local and national indicators to the contrary. ○ Mazars audit highlighted that KLS funding was agreed by schools forum in Mar 13 but without a firm basis for the resource allocation and needs to be reviewed. This will be incorporated into a funding agreement. 		
<p>2.2</p>		<ul style="list-style-type: none"> ○ Mazars have completed a full audit of all BFC SEN Resource provisions. A limited assurance opinion was expressed and a full action plan is now being developed ○ This plan will be considered by the SEN strategic group. ○ Ranelagh resource unit has now been closed ○ There have been initial discussions with the Head of Meadowvale to discuss broadening the criteria for the SALT resource. Outcome of the location of Rainbow resource may influence this. ○ The Head of SEN attends The Rise management Board. Challenges the resource faces have been brought to the attention of senior leaders/management board at Garth Hill College this year. There will be a sub-group of the management board established to deal with issues around staffing, integration of pupils into the main site and how the criteria for the resource can be adapted. July 17 ○ Rainbow resource has been relocated to Meadowvale Primary School from Great Hollands following a competitive procurement process. The resource has started the term well and is located in a separate designated area within the school. 		

2.3

- Secondary head teachers briefed on the outcome of the review and the recommendations made.
- Initial needs analysis based on current trend of PRU admissions completed. Needs analysis from schools to be undertaken
- Positive dialogue with management and management committee at the PRU regarding potential reshaping of provision
- Referral pathway to the PRU agreed as part of Fair Access Protocol. Clear statement within the protocol that Permanent Exclusion does not necessitate a place at the PRU

2.4

- In November 2016 the LA negotiated per pupil discounts with Chilworth House
- Attendance at Annual Reviews prioritised by the SEN team with a view to ensuring that they are correctly placed and with a view to possible return to BFC

2.5 **to be addressed**

2.6 **to be addressed**

- CCG are recruiting to a new post of Childrens commissioning lead following the SEND inspection of RBWM

Recommendation 3:

Greater coherence to the SEND system, designed with the child's need at the centre

- mapping to identify support that schools might ask BFC to commission on their behalf and support they might commission, or provide, themselves.
- The view of the Review team is that the HNFB element for the ASSC service should remain the same and that traded provision facilitates an extension of the service, whilst the HNFB funding for Support for Learning should gradually be phased out
- As a result of this recommendation and focus areas, mainstream schools will need to increasingly meet the costs of low to medium level support for pupils on SEN support, from their SEND delegated funding.

Focus	Lead(s)	Activity	Status	Milestones/ Success Criteria
<p>3.1 Update the Local Offer. This should form part of establishing a strong continuum of support for children and young people and their families.</p>	SEN	<p>1. Map the support pathways for each major SEND category.</p>	Green	<ul style="list-style-type: none"> • FIS to work with SEN to complete mapping exercise. Sep 17. • Information to be consulted on with parent/carer forum by Oct 17 • Place on LO website by November 2017.
<p>3.2 Review longstanding SEND support contracts</p>	Head of Targeted Services	<p>1. The contracts for SALT, OT and sensory support be revised to be worded on a performance basis and more closely monitored, with a clear recharge facility at the end of the year if the level of service varies from what was originally commissioned.</p> <p>2. The funded provision for SALT and sensory impairment should be reduced and be primarily for pupils with moderate to severe needs.</p> <p>3. Establish a purchasing framework for schools to commission and fund additional SALT and sensory impairment support on an annual basis.</p>	Green	<ul style="list-style-type: none"> • SALT, OT and Sensory contract contain outcome related measures with termly reporting. Mar 18 • Impact analysis undertaken to ascertain potential perverse incentives of reducing funded provision for SALT Mar 18
<p>3.3 Establish Trading arrangements for ASSC and Support for Learning, aligned with others being developed by BFC.</p>	Head of Targeted Services	<p>1. Clearly define the traded service including core services for high needs children attending mainstream schools or resource centres.</p> <p>2. Each traded service should set out costed support package options that schools can</p>	Amber	<ul style="list-style-type: none"> • SLA's in place. Sep 17

choose to sign up to annually.

Achievements/ Next Steps

3.1

- Mapping exercise completed
- Initial views of Parent/ carers sought. This is being further developed
- Partners and suppliers have updated their offer

3.2

- Recharge in place with refund of £14k from the Sensory consortium for 16 - 17
- Regular monitoring meetings for early years SALT provision in place
- Regular monitoring meetings for school and resource provision now established.
- There is an emerging training need being identified in meeting the low level SALT needs of our young people
- SEND area inspections have praised the model of provision that we currently have in numerous reports. This presents a risk if we change this and is currently being explored.

3.3

- ASSC and SfL SLA's have been redrafted to include core element and costed support package element. This will form a suite of SLA's as part of CYPL transformation
- Schools entered into three year SLA's April 2016. No significant changes to the costs or provision are being made to these services until April 19 following consultation with schools

20

- The redrafted SLA's will be issued to schools before Christmas as that is their opportunity to terminate an agreement.
- The redrafted SLA's identify some additional services that will be offered to further meet the needs of young people and raise revenue

Recommendation 4:**A data-rich SEND system that understands the difference it is making**

- Good quality, reliable data is necessary to underpin developments across the renewed SEND system
- This should underpin the Council's understanding of the performance of the system and processes
- Achieve greater transparency and connectivity between data held by teams in the Department and with other partner organisations.

Focus	Lead(s)	Activity	Status	Success criteria/ By when?
4.1 Establish a core SEND dataset	SEN	<ul style="list-style-type: none"> • Identify key aspects for the dataset • Identify reliable recurring sources for the data collection • Populate the dataset • Promote the dataset • Incorporate into DMT/ SEN strategy group monitoring 	Amber	<ul style="list-style-type: none"> • Core data set established. Aug 17
4.2 Ensure that data about pupils assessed at SEN support, received from schools as part of their school census reporting, is routinely collated alongside data gathered about children and young people with statements and EHCPs for inclusion in the core dataset.	SEN/ Performance Team	<ul style="list-style-type: none"> • Ensure core dataset is applied to SEN support pupils 	Amber	<ul style="list-style-type: none"> • SEN and performance team establish a process for amalgamating the data. Aug 17. • Dataset in place. Dec 17
4.3 Ensure financial reports about pupil top-ups and out of area funding are compiled by academic year, calendar year (linked to school census), as well as financial year and by place numbers and full costs, as well as FTE and pro-rata costs.	SEN/ Finance	<ul style="list-style-type: none"> • Analyse current spreadsheet • Develop spreadsheet • Identify key aspects for reporting • Produce reports for the governance group 	Green	<ul style="list-style-type: none"> • Financial reports routinely available. Jun17
4.4 Develop forecasting and cost projections to inform future send decision-making	Pupil Place planning/ SEN	<ul style="list-style-type: none"> • The existing BFC platform for modelling future demand for school places be extended to include modelling scenarios for the potential future demand for SEND places for up to ten years in the future. • The assumptions for future modelling are reassessed annually against the improved SEND data. In particular, more granular, high 	Amber	<ul style="list-style-type: none"> • SEN/ AP place planning is incorporated into pupil forecasting. Oct 17

		needs cost projections should be developed and projections improved for post-19		
--	--	---	--	--

Achievements/ Next Steps

4.1

- Dataset identified
- Business Intelligence review underway and CYPL is integral to the proposed changes
- Regular collation, analysis and reporting remains an issue until the BI review is complete and a performance team established
- We currently commission MIME to provide a data set which gives regular data information against the SEND dataset

4.2

- The dataset is identified
- Regular collation, analysis and reporting remains an issue until the BI review is complete and a performance team established

4.3

- Spreadsheet adjusted by education finance can now produce reports of this specificity in respect of EHCP data.
- A reporting schedule needs to be developed for DMT and SEN governance arrangements

4.4

- Initial discussions undertaken with school sufficiency team. It is felt that with current data in the four areas of SEN together with population trend data SEN forecasting can be incorporated into place planning. A modelling exercise is taking place this term to test the forecasting projections

TO: SCHOOLS FORUM
DATE: 19 OCTOBER 2017

**PROPOSALS TO REVISE THE WORKING ARRANGEMENTS
OF THE SCHOOLS FORUM
Director of Children, Young People and Learning**

1 PURPOSE OF REPORT

- 1.1 To consider revised working arrangements of the Schools Forum including the introduction of an informal pre-meeting in advance of each main meeting and whether the chair of the Forum should be an independent person and not linked to any of the statutory representative groups of the Forum.

2 RECOMMENDATIONS

2.1 To AGREE:

1. **Whether any changes should be made to the operational arrangements of the Forum;**
2. **That David Cook is appointed by the council as an Independent member of the Forum to be elected as chairman at the next meeting;**
3. **A potential vice chairman.**

3 REASONS FOR RECOMMENDATIONS

- 3.1 To facilitate an open, efficient and engaging format for the operation of Forum, to encourage debate and reach decisions from a consensus of views. An independent chairman will aid these objectives, allowing all other members to fully represent their groups.

4 ALTERNATIVE OPTIONS CONSIDERED

- 4.1 Continue with existing arrangement. Options other than those set out in this paper will be requested from Forum members at the meeting.

5 SUPPORTING INFORMATION

- 5.1 The Schools Forum has been operating under current arrangements for many years and the outcomes from the Department for Education (DfE) self assessment exercise by members in 2015 concluded that the suggested good practice levels identified by the DfE were being achieved by the council in 16 out of the 21 areas (76%). For 4 of the questions, members "didn't know" whether best practice was being met, and for one - Is it clear to observers who attendees at the forum are representing? (e.g. by use of name plates, indicating sector) – there was a clear "no".
- 5.2 Whilst the overall arrangements in place are therefore considered a good basis of operation, it has become more difficult to recruit members to the Forum, especially school governors, and attendance levels have suffered. Additionally, over the last two

meetings, attempts have been made to appoint a new chairman, but this has been unsuccessful and a temporary, time limited appointment has been made to October 2017. Without these key elements in place, the effectiveness of the Forum reduces.

- 5.3 We are now facing a period of considerable change during which it is important to have a strong and effective Schools Forum to advise the council on the key issues from the point of view of stakeholders and to be at the heart of decision making. In particular, the government is making significant change to school and education funding through national reforms, including the introduction of a Schools National Funding Formula and there are considerable financial pressures to overcome, not least the rising cost of supporting high needs pupils and the on-going strategic review of needs and provisions.
- 5.4 These issues were discussed at the last Forum meeting where a number of suggested improvements were identified that it was agreed should be brought forward to this meeting for formal consideration and agreement:
1. The council chamber as a venue is not considered conducive to open and engaging meetings. The previous Forum meeting was held in the Function Room at Easthampstead House which was agreed as a much better setting. As meetings must be held in public venues, it is proposed for future Forum meetings, when available, that these are held in the Function Room. The new council chamber being constructed at Time Square may present a more suitable venue in the future.
 2. To facilitate a better understanding of issues outside the formal meeting setting, and to encourage questions and proposals from members, it is proposed to introduce pre-meetings. These would best be held in schools, without a meeting record being maintained.
 3. The day and time was discussed and a 4 pm session the Thursday prior to the meeting was suggested. However, with meeting papers unlikely to be available earlier than the day of the pre-meeting, members would have little time to prepare. A pre-meeting on the Monday immediately prior to the formal Forum meeting is considered likely to be more effective.
- 5.5 Members are requested to consider the potential changes set out above together with any other suggestions that may arise and agree the way forward.
- 5.6 As set out above, as well as discussing the operational arrangements for the Forum at the last meeting, members also considered a proposal from the LA to source a range of Independent candidates for the Forum to consider for the role of chairman. This would allow all members to fully represent their group and fill a hard to recruit position.
- 5.7 Whilst acknowledging that the number of suitable candidates was likely to be low, this approach was agreed and 4 potential candidates have been identified. Schools Forum Regulations require Forum Members to elect the chairman – it cannot be an LA appointment – and to facilitate a potential appointment, the previous Forum meeting agreed to amend the membership structure to include an Independent person.
- 5.8 On review, 2 candidates were not considered suitable due to limited knowledge and direct experience of current education issues (one of these potential candidates was also not resident to the borough) and a further candidate declined the offer to be considered. Therefore, one suitable candidate is available for consideration.

- 5.9 The Forum is recommended to agree the appointment of David Cook as the independent representative on the Forum and to fill the vacant position of chairman through a vote at the next meet Forum meeting. A detailed profile is attached at Annex 1 that sets out a wide range of public and private sector experience and a keen interest in education.
- 5.10 The appointment of a vice chairman also needs to be considered. The main purpose of this position is to cover for the chairman should he be unavailable, and also to chair particular reports should the chairman declare a conflict of interest. Whilst the incidence of needing to cover the chairman is considered to be rare, a procedure needs to be in place to allow for the conclusion of business. Members are therefore requested to consider whether they would be prepared to take on the position of vice chairman.

6 ADVICE RECEIVED FROM STATUTORY AND OTHER OFFICERS

Borough Solicitor

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

Borough Treasurer

- 6.2 The Borough Treasurer is satisfied that no significant financial implications arise from this report.

Equalities Impact Assessment

- 6.3 Not required.

Strategic Risk Management Issues

- 6.4 None identified.

7 CONSULTATION

- 7.1 Not applicable.

Background Papers

Schools Forum Operation and Good Practice Guidance:

Schools Forum powers and responsibilities

<https://www.gov.uk/government/publications/schools-forums-operational-and-good-practice-guide-2015>

Contact for further information

Paul Clark, Finance Business Partner - CYPL

(01344 354054)

paul.clark@bracknell-forest.gov.uk

Doc. Ref

G:\Executive\Schools Forum\84) 191017\Revised Working Arrangements for the Schools Forum.doc

David Cook Profile

Background

30 + years working at 3M United Kingdom PLC, 15 years at board level, running a P&L Business portfolio of up to £200 million. (1978- 2011)

Chairman of Bracknell Forest Economic & Skills Partnership (6 years, stepped down February 2017)

Represented the partnership at Council Oversight & Scrutiny Committee

Board Member Thames Valley Berkshire Local Enterprise Partnership (Stepped down 2014)

Vice Chair & Governing Body member of Wokingham NHS Clinical Commissioning Group (3 years stepped down in May 2017) – Chaired Meetings in Public & Public Meetings

Careers Advisor – Careers & Enterprise Company (Stepped Down September 2017)

Currently

Chairman of Bracknell & Wokingham College Corporation

Chairman of Optalis Ltd (LA Trading company of Wokingham Borough Council & Royal Borough of Windsor & Maidenhead)

Governor of University of Winchester

Role of Chairman

To set by example the business and efficiency of the board, and ensure effective relationships with all the major stakeholders.

Enhance the reputation and standing of the organisation represented and ensure there is clarity and transparency of results and activities.

Recognise the responsibilities to the tax payer in the allocation of public funds and live by the Nolan principals of accountability.

Sector Interest & Personal Statement

I believe in the right of every child to have the access to good education and to develop their individual ability and capacity to succeed in whatever career pathway they choose. Hence my various roles in the education sector. I continue to develop my understanding of the public sector and the opportunity in knowledge exchange between public/private enterprise.

TO: SCHOOLS FORUM
DATE: 19 OCTOBER 2017

UPDATE ON SCHOOL AND EDUCATION FUNDING **Director of Children, Young People and Learning**

1 PURPOSE OF REPORT

- 1.1 The purpose of this report is for the council to present options to the Schools Forum on how funding should be allocated to schools in 2018-19. It builds on a number of previous briefings and discussions and incorporates the Department for Education's (DfE) recently published technical paper that identifies key information required for budget modelling.
- 1.2 This paper concentrates on the impacts anticipated on schools. There will be other impacts from changes to funding for High Needs pupils and centrally managed budgets which will be considered in detail at a later meeting of the Forum.

2 EXECUTIVE SUMMARY

- 2.1 Proposals for reforming school and education funding, most notably through the introduction of a School National Funding Formula (SNFF), were initially announced by the government in March 2016 and these are now reaching a conclusion. The SNFF is expected to be in place from April 2018, with LAs receiving funding for schools on the new national formula, but in order to aid a smooth transition to the SNFF, continuing to have freedom to calculate and distribute funding to schools for the next 2 years
- 2.2 At March 2020, responsibility for calculating funding for schools transfers to the Education and Skills Funding Agency (ESFA) for the implementation of a uniform funding formula for all schools in England with minimal involvement from local authorities (LAs).
- 2.3 Following responses to the most recent December 2016 Stage 2 consultation and the outcomes from the general election result, there will be an additional £1.3bn for schools and high needs budgets across 2018-19 and 2019-20. There will be £416m more than was set aside at the last spending review for the core school budget in 2018-19, and £884m more in 2019-20. Budgets beyond 2020 will be confirmed in the next spending review.
- 2.4 The key headlines from the government on how the extra money will be distributed are:
1. the basic amount that every pupil will attract in 2018-19 and 2019-20 will increase from 2017-18 levels.
 2. in calculating LA funding allocations through the aggregation of individual school budgets on the SNFF, there will be gains of up to 3% a year per pupil, with every school receiving at least a 0.5% a year per pupil cash increase.
 3. there will be minimum per pupil funding rates in 2018-19 for primary schools of £3,300 and secondaries of £4,600, rising to £3,500 and £4,800 in 2019-20. Meeting these minimum rates is outside the 3% cap set out above, meaning some schools will exceed the maximum 6% two year increase.

- 2.5 The latest anticipated financial impact on schools in Bracknell Forest (BF) calculated by the DfE through running the SNFF on October 2016 schools census data is that funding for BF schools through the SNFF will be 5.1% higher (£3.24m) than the actual amount received through the current funding framework. BF schools will experience an increase in per pupil funding ranging from 1.0% to 8.5%.
- 2.6 Despite there being an additional £1.3bn of investment in “core school budgets”, there is no overall increase in funding allocated to BF schools compared to the December 2016 amount. Whilst there is an increase of £0.263m of funding in 2018-19, this is offset by a compensating reduction in 2019-20.
- 2.7 This unwelcome outcome arises because the latest changes generally increase funding to the schools that were previously facing a funding cut or relatively low increase and is a consequence of moving from limiting the maximum annual per pupil reduction of 1.5% to a minimum increase of 0.5%. The maximum per pupil increase remains at 3%. Therefore, areas that are currently receiving the lowest levels of funds - BFC is the 6th lowest funded education authority and receiving additional funding – will not generally see an increase in funding from the additional £1.3bn investment
- 2.8 Funding for BF schools will increase by £1.696m (2.6%) next year. However, as uncertainty exists over how the DfE will fund LAs for the start-up and diseconomy funding to be experienced at new schools, the additional £0.555m cost estimate for new BF schools will need to be financed from within the overall funding increase, with £1.141m therefore available for existing schools.

3 RECOMMENDATIONS

3.1 To NOTE:

- a. **the latest announcements from the government on school and education funding reform**
- b. **the additional £0.555m of cost from new schools that will need to be funded next year**
- c. **that the council will not be requesting that the funding maintained schools receive for the SIMS licence fee is returned to the council for central management through the de-delegation route.**

3.2 To AGREE the recommended approach to be taken in setting school budgets in 2018-19, for inclusion in the financial consultation with all schools.

4 REASONS FOR RECOMMENDATIONS

- 4.1 To gather views from the Schools Forum on the issues that should be presented to all schools through a formal consultation on how school budgets should be calculated in 2018-19.

5 ALTERNATIVE OPTIONS CONSIDERED

- 5.1 Not applicable.

6 SUPPORTING INFORMATION

Background

- 6.1 The Schools Forum has been kept up to date on the planned national reforms of school and education funding with regular briefings. The original DfE proposals set out a 2 Stage approach to reform where Stage 1 sought comments on key outline proposals for change, with Stage 2 confirming revised proposals following the Stage 1 consultation, as well as setting out the key illustrative financial implications anticipated at individual school level using 2016-17 data. Stage 2 also set out a final set of questions where views on further issues were sought.
- 6.2 On 17 July 2017, the Secretary of State for Education set out to parliament the future arrangements for school funding which confirmed the introduction of the SNFF from April 2018 and also significant extra investment into the core schools budget over the next two years - £1.3bn - to "...recognise that at the election people were concerned about the overall level of funding for schools as well as its distribution". The statement also confirmed new elements to the finalised reforms that had not been previously presented.
- 6.3 The main announcements to date indicated:

Stage 1 – March 2016

1. Move to new national funding formulae to allocate funds:
 - a. directly to schools through a consistent approach across the country, including national rates of funding. The ESFA will allocate the funds through the SNFF with minimal LA involvement.
 - b. to LAs for their ongoing areas of responsibility relating to high needs pupils (through the High Needs National Funding Formula) and for early years provisions (through the Early Years National Funding Formula).
2. Remove the existing £600m of grant funding allocated to LAs to meet 'general' statutory and regulatory education related services – BFC receives £1.2m through the Education Services Grant (ESG) - whilst maintaining all the existing responsibilities. Funding Regulations were updated to allow maintained schools to in future contribute to the costs.
3. Introduce changes on a phased basis from April 2017, with the expectation that the SNFF will be fully implemented from April 2019, via the ESFA.
4. Add to the SNFF an additional £500m through the current spending review period to March 2020 to ensure more schools gaining from the changes receive the full benefit earlier than would otherwise be the case whilst at the same time adding protection to limit losses to those schools that at present receive more funds than would be allocated through the SNFF.

Stage 2 - December 2016

5. The SNFF would comprise of 13 different elements; age weighted pupil unit, deprivation, low prior attainment, English as an Additional Language, lump sum, sparsity (not relevant to BF), rates, Private Finance Initiative (net relevant to BF), split site, exceptional circumstances (not relevant to BF), high mobility rate, growth and an area cost adjustment.
6. The relative weighting of funds to be distributed through each element would largely be based on the average current distribution of funding made by LAs but with significant differences to this approach relating to increasing funding on

additional needs factors and also recognising disadvantage in a broader sense. The increases will be financed by a lower amount of basic per pupil funding and also a reduced lump sum amount that all schools receive, irrespective of size.

7. LAs will be responsible for allocating individual school budgets in 2018-19, but the total area allocation will be based on the aggregate funding schools would have received if the SNFF was fully operational. LAs can continue to use their own local Funding Formula, although the DfE “encourages” LAs to adopt the NFF. ESFA will allocate budgets to schools from April 2019.
8. To build in an overall ‘funding floor’, so that no school will face a reduction of more than 3% per-pupil overall as a result of this formula.
9. During transition, the minimum funding guarantee of minus 1.5% per-pupil in any year will continue, providing additional stability for schools. Schools can receive gains of up to 3% per-pupil in 2018-19, and then up to a further 2.5% in 2019-20. Gains are capped to fund the maximum per pupil loss protection to be applied to schools losing funds.
10. Whilst the Schools Block amount will be ring fenced for schools, the DfE will allow funding transfers to the High Needs Block, if there is local agreement.
11. LAs would continue to have a role in School Improvement, and there would be the option to seek additional funds from maintained schools through the ‘de-delegation’ route for services outside the statutory and regulatory provisions.
12. Funding for on-going LA responsibilities would be provided through a new Central School Services Block to the Dedicated Schools Grant (DSG). This would cover ‘retained’ statutory and regulatory duties – the £15 per pupil amount to fund duties that LAs must provide to all schools, including academies, previously grant funded - and School Admissions, servicing of Schools Forums, fees to independent schools for pupils with SEN, centralised copyright licence, LA initiatives and costs of providing combined education and children’s services, e.g. Family Intervention Team, Looked After Children Education Service.

Illustrative financial implications for schools - December 2016

13. In December 2016, DfE provided provisional financial information on the potential impact arising from the reforms, using October 2016 school census data. This showed that funding for BF schools through the SNFF would have been 5.1% higher (£3.24m) than the actual amount received through the current funding framework. 4 schools would experience a cash reduction in funding (from 0.2% to 1.6%), 33 schools would experience an increase (from 0.2% to 11.6%). The increase in funding mainly reflects the relative low per pupil funding currently received in the BFC DSG compared to the amount that will be paid through the SNFF
14. Schools would not move directly to the SNFF as funding protection will be in place. After applying transitional funding protection to cap per pupil increases to no more than 3% and limit annual losses to no more than 1.5%, there would have been an overall increase of 2.2% (£1.433m). As expected, the effect of this is to reduce the amount of losses (now from 0.2% to 1.3%) and limit the gains (now from 0.2% to 2.9%).

Latest announcements – July and September 2017

15. On 17 July 2017, the Secretary of State for Education set out to parliament the future arrangements for school funding which confirmed the introduction of the SNFF from April 2018 and also significant extra investment into the core schools budget over the next two years to “...recognise that at the election people were

concerned about the overall level of funding for schools as well as its distribution.”

16. This statement announced that there will be £1.3bn for schools and high needs across 2018-19 and 2019-20 in addition to the schools budget set at spending review 2015: £416m more than was set aside at the last spending review for the core school budget in 2018-19, and £884m more in 2019-20. Spending plans beyond 2020 will be confirmed in the next spending review.

Initial Financial Implications for schools – September 2017

17. At the time of the last Forum meeting, it was reported that the DfE had yet to publish any illustrative financial implications arising from the new changes that will now form part of the national school funding reforms. Therefore, likely financial implications from the additional £1.3bn could not be accurately quantified.
18. A written technical document has now been published, which was followed on 4 October with detailed school level financial information. This indicates that funding for BF schools through the SNFF would have been 5.1% higher (£3.246m) than the actual amount received through the current funding framework. By the end of the 2 year period, BF schools will experience an increase in per pupil funding ranging from 1.0% to 8.5%.
19. Schools will not move directly to the final SNFF as the additional funding of £1.3bn is being made across 2 years. Therefore in 2018-19, funding is estimated to increase by 2.6% (£1.696m), and whilst the SNFF will deliver increases in per pupil funding for BF schools ranging from 0.5% to 3.9%, this may not be replicated through the transitional use of the BF funding formula as the School Funding Regulations do not allow for LAs to replicate all aspects of the SNFF.
20. Annex 1 sets out current 2017-18 baseline budgets and indicative SNFF budgets for individual BF schools for 2018-19 and 2019-20.

Impact in BFC of the additional £1.3bn investment

21. Despite there being an additional £1.3bn of investment in “core school budgets”, there is no overall increase in funding allocated to BF schools compared to the December 2016 amount. Whilst there is an increase of £0.263m of funding in 2018-19, this is offset by a compensating reduction in 2019-20.
22. This unwelcome outcome arises because the latest changes generally increase funding to the schools that were previously facing a funding cut or relatively low increase and is a consequence of moving from limiting the maximum annual per pupil reduction of 1.5% to a minimum increase of 0.5%. The maximum per pupil increase remains at 3%. Therefore, areas that are currently receiving the lowest levels of funds - BFC is the 6th lowest funded education authority – will not generally see an increase in funding from the additional £1.3bn investment from that announce in December.

Detailed new arrangements

23. In calculating LA funding allocations through the aggregation of individual school budgets on the SNFF, there will be gains of up to 3% a year per pupil, with a minimum increase of 0.5% meaning all schools receive an increase. The previous proposals had permitted per pupil funding gains of up to 3% in 2018-19 and 2.5% in 2019-20 and losses of up to 3% over 2 years.
24. To allow for a measured transition to the new SNFF, LAs will retain responsibility for individual school funding allocations in both 2018-19 and 2019-20 rather than

immediately adopting the SNFF. This means not every school will necessarily receive at least the 0.5% per pupil cash increase mentioned directly above. The minimum change in per pupil funding will be determined by the local Minimum Funding Guarantee (MFG) amount. However, those LAs receiving the largest funding increases from the reforms are most likely to be able to move closely to the SNFF values for their schools.

25. For the next 2 years, LAs will have the flexibility to set a local MFG between 0% and minus 1.5% per pupil. In recent years the MFG has been set by the DfE at minus 1.5% per pupil. Where affordable, LAs can use the flexibility to offer higher levels of protection locally. As in previous years, the cost of any protection can be financed by limiting gains due to relevant schools.
26. There will now be minimum per pupil funding rates. The SNFF will provide LAs with per pupil funding of at least £4,800 for all secondary schools that have pupils in years 10 and 11 by 2019-20. In September 2017, minimum per pupil funding rates for 2019-20 were also confirmed for primary schools at £3,500. For 2018-19 the minimum per pupil funding rates will be £4,600 and £3,300 respectively. The DfE has determined that minimum per pupil funding amounts will be calculated from an individual school's total budget **less** allocations for budgets that are allocated on an historic cost basis i.e. business rates, and where relevant, high pupil mobility.
27. A new 14th factor will be allowed in local authority formulae in order to ensure these minimum rates can be allocated. The confirmed BF per pupil funding rates that the council will receive in 2018-19 are £3,616 for primary aged pupils and £4,849 for secondary.
28. In calculating school budgets through the SNFF, meeting the new minimum per pupil funding rates takes precedent over the 3% cap on per pupil funding gains set out above at point 23. Therefore, for the lowest funded schools, the SNFF will allocate a higher than 3% increase in per pupil funding.
29. The Schools Block will also include funding at LA level for premises, mobility and centrally managed growth (which includes new school funding for start-up and diseconomy funding), based on historic spend. For 2018-19, each LA will be funded at the amount budgeted for on these items in 2017-18. The Forum will be aware of significant financial pressures expected in BF over the coming years in respect of needing to meet additional costs from diseconomy funding for new schools.
30. The schools block will be ring-fenced from 2018-19, but LAs will be able to transfer out up to 0.5% of their schools block funding – circa £0.32m for BF - with the agreement of their schools forum. LAs will be expected to demonstrate to their Schools Forum that they have consulted locally with all maintained schools and academies when seeking agreement to transfer any funding out of the schools block. There will be an exceptions process, which will require Secretary of State approval, for considering transfers above the 0.5% limit and/or where the schools forum is opposed to the transfer. Funding transfers from other blocks are not subject to limits
31. Funding for physical education and sports premium for primary schools will double to £8,000 to each school and £10 per pupil. All primary schools will receive an increase in their PE and sports premium funding from September 2017.
32. The Pupil Premium Plus – relating to looked after children (LAC) – will increase from £1,900 to £2,300. The £281 per LAC currently paid to schools through the BF formula is proposed to be removed to avoid double funding.

Operation guidance

- 6.4 As well as the significant changes to the school funding framework set out above in paragraph 6.3, there are also details of a number of less significant changes that will also need to be considered in setting the 2018-19 budget:
1. LAs can now use both current free school meals and “ever 6” free school meals measures within their deprivation factors (previously one of these measures could be used, but not both);
 2. Schools with SEN Resource Units are currently funded at £10,000 per agreed place, with no per pupil or other funding for the pupils attending the Unit. In future, these pupils will be included in the school’s funded number on roll in the same way as all other children are, attracting additional deprivation etc. funding where eligibility criteria is met. Funding of £6,000 per place where the place is occupied by pupils in years reception to 11 on the roll of the school at the time of the October school census return will then be added. The extent to which relevant schools will experience a funding gain or loss from this change will be determined by the amount of per pupil funding pupils in the Unit attract. Where this is below £4,000 there will be a loss, but a higher amount will result in a gain. Places commissioned by LAs at census date that are empty, but held for a future placement will continue to be funded at the current £10,000. The financial impact of this change will need to be determined for relevant schools and considered when the calculation for any top-up funding above the £10,000 threshold is required.
 3. With the increase in funding through the Pupil Premium Plus Grant, there is no longer a requirement to include a factor in local funding formulas to distribute money according to the number of looked after children.

Initial planning for the 2018-19 Schools Budget

Setting the budget control total

- 6.5 Taking account of the most recent guidance and release of the detailed financial data, initial plans for 2018-19 budgets can now be prepared, of which the first stage is to agree the content for the financial consultation with all schools to gather views on how the budget should be constructed. To allow an informed decision on this, it is important to provide indicative financial information for the options that are presented.
- 6.6 The first stage to developing the financial information is to understand the baseline budgets calculated by the DfE. Table 1 below shows the stages of change, starting with the original budget as approved by the Schools Forum in January 2017, the adjustments made by the DfE to accommodate the new funding framework, and the resultant calculation of 2018-19 school budgets through the SNFF. The overall amounts reconcile to the totals shown on the individual schools’ budget allocations at Annex 1.
- 6.7 The adjustments processed by the DfE to the 2017-18 budget ensure it is presented on the same basis as the ongoing 2018-19 funding, thereby reflecting any changes to the way funds will be allocated to LAs. The changes to the 2017-18 base budget are:
1. Removing the £0.179m of one-off funding in the 2017-18 BF Schools Budget. This was available in 2017-18 only from prior year unspent budgets managed by the council on behalf of schools and is not part of the on-going base budget to be funded in 2018-19 and beyond through the DSG.
 2. Adding in the cost of funding schools with SEN Resource Units the actual pupils on roll, based on pupil led funding factors. This is currently funded as part of the

£10,000 per place funding allocation through the High Needs Block. Adding core funding for these pupils into delegated school budgets requires a funding transfer from the High Needs Block to the Schools Block (£91m). Relevant schools will also receive a £6,000 element 2 place funding allocation through the High Needs Block. The BF budget baseline has been increased by £0.176m to reflect this and is further explained above in paragraph 6.4 (2). Relevant schools will be contacted to discuss the financial implications arising from this change, if any.

3. Adjusting budgets for the impact on the cost of rates following conversion to an academy. Academy schools are charities and receive 80% rates relief. When community schools become academies there is an in year saving. The impact of conversions between April and August 2017 has been built into 2018-19 budgets and therefore also needs to be reflected in the 2017-18 baseline. In BF this amounts to a saving of £0.024m.

Table 1: Budget baselines for 2017-18 and 2018-19

Budget item	£000s
<u>2017-18 budget agreed at 12 January 2017 Schools Forum</u>	
Delegated school budgets	£63,509
De-delegated funding	£1,275
£20 per pupil contribution to LA statutory education duties	£282
Total basic allocation	£65,066
<u>DfE adjustments to the 2017-18 base budget</u>	
Remove one year only funding added from BF Schools Forum Reserves	-£179
Add cost of SEN Unit pupils (see para 6.4 (2))	£176
Adjust rates for schools converting to an academy in 2017-18	-£24
Total 2017-18 adjusted baseline	£65,039
<u>DfE calculation of SNFF for 2018-19:</u>	
Core budget allocation through SNFF (incorporates the 2017-18 adjustments)	£66,735
Total 2018-19 baseline	£66,735
Increase in funding for 2018-19	£1,696

- 6.8 The figures in Table 1 set out the change in funding anticipated based on October 2016 school census data. Actual budgets in 2018-19 will be determined from the October 2017 schools census. Therefore, the amount of funding available in 2018-19 remains an estimate and will be subject to change from the October 2017 school census.

Changes arising from new / expanding schools

- 6.9 Members of the Forum will be aware that current pupil forecasts indicate the need for six new schools over the medium to long term. This will create a significant revenue budget pressure for start-up and diseconomy funding. However, due to the long term nature of the build programme, the reliance on external factors, such as the speed of house building that will be determined by a range of developers, complexities around formulating accurate pupil forecasts down to individual school level and the continuing uncertainty arising from the impact of the national funding reforms, the cost forecast is subject to regular review and revision.

- 6.10 With Binfield Learning Village (BLV) scheduled to open to secondary aged pupils in September 2018 (part year financial effect in 2018-19), the cost of supporting new schools will increase from the amount set aside in the 2017-18 budget which is the cash frozen amount the DfE will provide again to LAs in 2018-19. A provisional estimate of the likely cost increase next year is £0.555m. The forecast for 2019-20 shows a further increase of £0.479m and mainly reflects the estimated cost of BLV being open for a full year.
- 6.11 As previously reported, the DfE has yet to determine how LAs will be funded for new schools in 2019-20. The current assumption is that LAs would be funded annually in arrears for the cost of new schools, so for BF we would expect a further £0.555m in the 2019-20 budget, with the 2020-21 budget reflecting actual cost in 2019-20 and so on.
- 6.12 In order to properly plan the 2018-19 budget, it is important to establish clarity on the long term funding policy for this key issue for BF. If it is clear that any annual increase in cost for new schools will be directly funded by the DfE, but annually in arrears, then plans can be made to cover what is essentially a cash flow issue. There would be an over spending when new schools open and require diseconomy funding, but over time, as they fill up and diseconomy top-ups are removed, the lagged funding would mean that the short term over spending would eventually be fully funded through future over payments. If this approach is confirmed, then all of the £1.696m additional funding can be allocated through the BF funding formula, otherwise a top slice will need to be taken from the funding increase to fund the cost.
- 6.13 Therefore, a clarification was sought from the DfE which stated “we are aware that historic spend on growth will not necessarily predict accurately the amount of funding that will be needed for growth in future. However, we are confident that this approach will work for 2018-19; and we are looking at alternative options for the longer term. At this moment in time we do not have a timescale yet but we will continue to look at the options for funding growth in 2019-20 and beyond”. We have made clear our position to the DfE in that the council will not consider funding the additional £0.555m cost of new schools unless there is certainty that the over spend will be funded by the DfE in the following year.
- 6.14 Therefore, at this stage of the budget process, the £0.555m additional cost of new schools needs to be financed from within the overall DSG allocation and is therefore a pressure against the £1.696m funding increase, meaning £1.141m is available to allocate through the BF funding formula. Should DfE provide certainty of future funding arrangements from new schools, then this approach will be reviewed.
- 6.15 In respect of the Funding Policy for New and Expanded Schools, this is reviewed annually by the Schools Forum and will be presented for consideration at the next meeting in December. Taking account of the experience gained to date on the new schools that have recently opened, and the soon to open BLV, together with the changes in the funding framework through the introduction of the SNFF and in particular the minimum per pupil funding values, the council is likely to propose a number of changes to the current policy.

Options for allocating new money to schools

- 6.16 In order to calculate robust financial models to present funding options for schools to consider during the 2 year transition to the SNFF, it is important to be able to replicate the published summary school level SNFF funding allocations. This provides assurance that BF understanding of the methodology is correct and the impact of local proposals can be readily compared to the SNFF.
- 6.17 It is important that the Forum and schools consider a range of options for the development of next year's budget and the council considers that there needs to be a measured transition from the current position to the new SNFF. Three options have therefore been modelled, each of which allocate available resources after setting aside £0.555m for new schools, as set out in paragraphs 6.9 to 6.15. Under all 3 options there are only 2 secondary schools that need a funding top up to achieve the minimum per pupil funding rates.

Option 1: aim for a close fit to the indicative 2018-19 SNFF allocation for each school.

The SNFF calculation by the DfE incorporates the gains of up 3% a year per pupil, with a minimum increase of 0.5%. School Funding Regulations do not permit LAs to incorporate these conditions when calculating school budgets and therefore impact on the ability to fully replicate the SNFF.

Annex 2 sets out illustrative budget allocations for Option 1.

Option 2: continue with the BF Funding Formula, remove funding for Looked After Children as additional resource will be paid through the Pupil Premium, increase all other units of resource in accordance with the budget strategy (see Annex 6), subject to meeting DfE funding regulations, in particular, the minimum per pupil funding values and estimated actual costs for rates.

Annex 3 sets out illustrative budget allocations for Option 2.

Option 3: continue with the BF Funding Formula, remove funding for Looked After Children as additional resource will be paid through the Pupil Premium, increase all amounts allocated by other formula factors by the same percentage, subject to meeting DfE funding regulations, in particular, the minimum per pupil funding values, the £0.170m cap on lump sum payments and estimated actual costs for rates.

Annex 4 sets out illustrative budget allocations for Option 3.

Annex 5 sets out indicative units of resource by Funding Formula factor for each Option.

To allow a focus on the principles of each of the modelled Options, the individual school financial illustrations set out in the annexes have been anonymised. There is a general note to explain the columns of data in the Annexes before Annex 2.

- 6.18 After budgets have been calculated, to ensure a degree of funding stability is maintained, the DfE requires a Minimum Funding Guarantee (MFG) to be applied that sets a minimum reduction in per pupil funding that a school can experience between years. In recent years this has been set nationally at minus 1.5% for all schools. From 2018-19, DfE is allowing LAs to set a rate locally that must be between 0% and minus 1.5%. For modelling purposes, each of the options 1 to 3 have been calculated with an MFG of 0%, minus 0.75% and minus 1.5%. With additional funding available next year, the cost of the MFG should reduce with fewer schools facing a loss and the opportunity to consider the highest possible rate of protection to schools experiencing the lowest changes in per pupil funding.

- 6.19 The cost of the MFG can be financed by applying a cap to the schools receiving the highest per pupil gains, which is the approach currently taken in BF and is proposed to continue into 2018-19. Schools receiving an increase in per pupil funding as a result of the new guaranteed minimum per pupil funding rates will not contribute to funding the cost of the MFG as meeting this requirement takes precedent over the MFG.
- 6.20 The Forum is requested to review the options presented with a view to including a recommended option to schools on the financial consultation with schools document. The council considers Option 1, the closest match to the SNFF the most suitable approach as it presents the closest match to the method that all schools will be fully funded on from April 2020, and therefore presents the smoothest transition to this position.

Other matters

De-delegated budgets

- 6.21 Forum members will be aware that national funding arrangements require all LAs to delegate funding for the same services and functions, with a general presumption of maximum delegation. However, where relevant representatives on a Schools Forum agree that the whole budget for their phase e.g. primary or secondary should be returned to the Council for central management, this is allowed, but only in respect of a small number of services. This recognises that there are reasons of cost effectiveness, risk sharing or ease of organisation / management that a strategic approach can bring.

6.22 The DfE term this approach “de-delegation” and requires annual approval from the school representatives on the Schools Forum for it to be implemented for maintained schools. Academy schools are responsible for providing these services and therefore receive their share of “de-delegated” budgets direct, with some being available for purchase from the council. The relevant services affected are summarised below in Table 2, divided between those the council will request are subject to de-delegation, and those that the council will not request de-delegation, including the impact of schools that are expected to be academies by 1 April 2018.

Table 2: Services subject to de-delegation at April 2018

Ref	Service area	Gross budget £k	Academy deduction £k	Potential retained LA budget £k
	Items to be subject to de-delegation			
1	Contingencies; support to schools in financial difficulty and exceptional costs in primary schools (1)	290	-95	195
2	Support to underperforming ethnic minority and bi-lingual pupils	127	-31	96
3	CLEAPSS licence fees	1	0	1
4	Staff supply cover for official absences (1, 2)	360	-102	258
5	Premature retirement / dismissal costs (1)	62	-18	44
6	Free school meals eligibility checking	20	-6	14
7	Behaviour and Education Support Team	300	-75	225
8	Anti-bullying co-ordinator	25	-7	18

	TOTAL	1,185	- 334	851
Ref	Items proposed for de-delegation	Gross budget £k	Academy deduction £k	Potential retained LA budget £k
	Items not to be subject to de-delegation			
9	SIMS (1) licence fees	89	-25	64

- 1 Not available for buy-back by academy schools
- 2 Includes maternity leave, trades union and staff suspensions.

6.23 For the first time, the council will not be requesting that the SIMS licence fee¹ funding be returned for central management. This reflects the increasing impact of academy schools where the amount of funding retained by academies exceeds the fee deduction that Capita will provide, resulting in a loss. Furthermore, the increasing number of schools making their own arrangements for ICT support rather than through the council's SLA makes on-going central management of this licence fee less appropriate.

LA education related statutory and regulatory duties

6.24 Forum members will be aware that LAs were previously funded through the Education Services Grant to meet education related statutory and regulatory duties. The grant comprised two component parts; a 'general duties' element that falls directly on to schools to fulfil should they become an academy; and a 'retained duties' element for the obligations that LAs have to fulfil to both academies and maintained schools. From April 2017, there was a phased withdrawal of funding for the 'general duties' element that cost the council £1.2m. The £0.26m received for the 'retained duties' element was transferred into the DSG and made available to continue to finance these costs.

6.25 As part of the 2017-18 budget setting process, maintained schools agreed that they would make a £20 per pupil contribution to LAs to part finance the cost of these services whilst the council continued its Transformation programme to reduce costs. However, these costs not be eliminated as there remain statutory and regulatory duties to meet. The council is likely to again seek permission from maintained schools to contribute £20 per pupil to these costs, which will generate around £0.250m.

Annex 7 sets out a summary of the outline statutory and regulatory duties required of the council.

School loan scheme

6.26 The last meeting of the Forum received an update on school loan advances where it was confirmed that as at 1 April 2017, there was a net £0.738m of outstanding school loans which represents 39% of aggregate surplus balances. With the loan scheme having an outline cap at a maximum amount of advance of no more that 40% of total balances, and with aggregate surplus balances likely to continue to reduce, there is a strong possibility that this limit will be exceeded. A review of loan arrangements at other LAs shows that a range of different capping limits have been set from 20% to 50%. It has also subsequently been confirmed by the DfE that LAs in consultation with their Schools Forum are permitted to set their own threshold limit.

¹ This covers the cost of providing support to the software required to perform most of the administration tasks in schools. It relates to the payment to CAPITA (software supplier) for software maintenance support

- 6.27 The original expectation was to bring revised proposals to this meeting. However, the DfE has recently indicated that there will be a national consultation on school loans which makes it inappropriate to undertake a local consultation at the stage. The likely timescale and content of the consultation has not been disclosed.

Early Years

- 6.28 In terms of developing the 2018-19 budget for Early Years (EY) providers, the original expectation was to review the current EY funding formula through a provider workshop in September, open to all providers in receipt of 3 and 4 year old funding, to gather their views and experiences of the funding arrangements and to consider how to apply the expected 5.8% increase in per child funding. However, due to limited interest from providers, the workshop was cancelled.
- 6.29 As an alternative to a general workshop, all childcare providers registered with BF to deliver free entitlements have now been contacted and invited to participate in an Early Years Free Entitlements Steering Group (SG). The first meetings of the SG are planned for October and early November and if feedback indicates a need for the early years funding formula to be reviewed, the key areas for change will be captured and included on a consultation document to be circulated to all providers. This will also consider the best approach to take in the allocation of the anticipated 5.8% funding increase.

Next steps

- 6.30 Once the Forum has agreed the recommended approach to take in setting the 2018-19 budget, there will be a consultation with schools to gather wider views. This is most likely to be for 3 weeks from 30 October to 17 November. The outcomes will be reported to the Forum at its December meeting where initial budget decision will need to be taken. Final budget decisions must be taken at the January 2018 meeting.
- 6.31 The timetable of key events anticipated at this stage is attached at Annex 8.

7 ADVICE RECEIVED FROM STATUTORY AND OTHER OFFICERS

Borough Solicitor

- 7.1 The relevant legal issues are identified within the body of the report.

Borough Treasurer

- 7.2 The anticipated financial information is set out in the supporting information. The additional funding available will assist schools in managing their budgets following a sustained period of cash flat funding settlements.

Equalities Impact Assessment

- 7.3 The DfE has completed an EIA on the impact of their proposals.

Strategic Risk Management Issues

- 7.4 The on-going DfE policy for funding LAs for cost increases arising from new and expanding schools has yet to be confirmed and with additional costs anticipated for a number of years presents a risk to funding schools. For 2018-19, the proposal is to finance the additional £0.555m from within the overall increase in funding for schools.

8 CONSULTATION

8.1 Not applicable at this stage.

Background Papers

DfE policy and guidance documents:

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

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

Previous meetings of the BF Schools Forum that can be found at:

<http://democratic.bracknell-forest.gov.uk/ieListMeetings.aspx?Committeeld=187>

Contact for further information

Paul Clark, Finance Business Partner - CYPL
paul.clark@bracknell-forest.gov.uk

01344 354054

Doc. Ref

G:\Executive\Schools Forum\84) 191017\Update on school and education funding - October 2017.doc

DfE Illustrative school budget allocations through the proposed SNFF using October 2016 school census data

School Name	Baseline funding	Notional SNFF funding in 2018-19 (year 1)			Illustrative SNFF funding in 2019-20 (year 2)		
	Baseline funding (2017-18)	Notional total SNFF funding in 2018-19	Percentage change compared to baseline	Percentage change in pupil-led funding	Illustrative total SNFF funding in 2019-20	Percentage change compared to baseline	Percentage change in pupil-led funding
Ascot Heath C.E.Junior School	£867,000	£877,000	1.1%	1.3%	£877,000	1.1%	1.3%
Ascot Heath Infant School	£775,000	£782,000	0.9%	1.1%	£782,000	0.9%	1.1%
Binfield C of E Primary School	£1,383,000	£1,421,000	2.7%	3.0%	£1,460,000	5.6%	6.1%
Birch Hill Primary School	£1,435,000	£1,473,000	2.7%	3.0%	£1,513,000	5.4%	6.1%
College Town Infants School	£890,000	£913,000	2.6%	3.0%	£919,000	3.2%	3.8%
College Town Junior School	£921,000	£944,000	2.6%	3.0%	£963,000	4.6%	5.4%
Cranbourne Primary School	£784,000	£788,000	0.5%	0.6%	£790,000	0.8%	1.0%
Crown Wood Primary School	£1,803,000	£1,853,000	2.8%	3.0%	£1,905,000	5.6%	6.1%
Crowthorne CE Primary School	£792,000	£807,000	1.9%	2.3%	£807,000	1.9%	2.3%
EASTHAMPSTEAD PARK	£3,996,000	£4,092,000	2.4%	2.6%	£4,092,000	2.4%	2.6%
Edgbarrow School	£4,951,000	£5,134,000	3.7%	3.9%	£5,350,000	8.0%	8.5%
Fox Hill Primary School	£842,000	£863,000	2.5%	3.0%	£873,000	3.7%	4.4%
Garth Hill College	£7,019,000	£7,217,000	2.8%	3.0%	£7,420,000	5.7%	6.1%
Great Hollands Primary School	£1,599,000	£1,643,000	2.7%	3.0%	£1,688,000	5.5%	6.1%
Harmans Water Primary School	£2,086,000	£2,144,000	2.8%	3.0%	£2,212,000	6.0%	6.6%
Holly Spring Infants	£973,000	£998,000	2.6%	3.0%	£1,025,000	5.3%	6.1%
Holly Spring Junior School	£1,255,000	£1,289,000	2.7%	3.0%	£1,324,000	5.5%	6.1%
Jennett's Park CE Primary School	£1,268,000	£1,296,000	2.2%	2.4%	£1,296,000	2.2%	2.4%
Meadow Vale Primary School	£2,061,000	£2,118,000	2.8%	3.0%	£2,178,000	5.7%	6.1%
New Scotland Hill Primary	£772,000	£790,000	2.4%	2.8%	£790,000	2.4%	2.8%
OWLSMOOR PRIMARY SCHOOL	£1,844,000	£1,895,000	2.8%	3.0%	£1,989,000	7.9%	8.5%
Ranelagh School	£3,619,000	£3,724,000	2.9%	3.0%	£3,850,000	6.4%	6.6%
Sandhurst School	£4,428,000	£4,551,000	2.8%	3.0%	£4,679,000	5.7%	6.1%
Sandy Lane Primary School	£2,009,000	£2,065,000	2.8%	3.0%	£2,122,000	5.6%	6.1%
St Margaret Clitherow Catholic Primary	£797,000	£816,000	2.4%	2.8%	£816,000	2.4%	2.8%
St Michael's CE Primary School Sandhurst	£719,000	£722,000	0.4%	0.5%	£725,000	0.8%	1.0%
St. Joseph's C Primary School	£794,000	£805,000	1.4%	1.7%	£805,000	1.4%	1.7%
St. Michael's Easthampstead	£904,000	£928,000	2.6%	3.0%	£935,000	3.4%	3.9%
The Brakenhale School	£4,532,000	£4,664,000	2.9%	3.0%	£4,801,000	5.9%	6.1%
The Pines School	£1,069,000	£1,097,000	2.6%	3.0%	£1,125,000	5.3%	6.1%
Uplands Primary School	£779,000	£786,000	0.9%	1.0%	£786,000	0.9%	1.0%
Warfield CE Primary	£1,415,000	£1,452,000	2.7%	3.0%	£1,494,000	5.6%	6.4%
Whitegrove School	£1,430,000	£1,468,000	2.7%	3.0%	£1,507,000	5.4%	6.1%
Wildmoor Heath School	£771,000	£784,000	1.7%	2.1%	£784,000	1.7%	2.1%
Wildridings Primary School	£1,457,000	£1,496,000	2.7%	3.0%	£1,537,000	5.5%	6.1%
Winkfield St Marys CE Primary	£765,000	£773,000	1.0%	1.2%	£773,000	1.0%	1.2%
Wooden Hill Primary	£1,235,000	£1,267,000	2.6%	3.0%	£1,293,000	4.7%	5.4%
TOTAL	£65,039,000	£66,735,000	2.6%		£68,285,000	5.0%	
Maximum	£7,019,000	£7,217,000	3.7%	3.9%	£7,420,000	8.0%	8.5%
Minimum	£719,000	£722,000	0.4%	0.5%	£725,000	0.8%	1.0%

Note: All figures are gross amount i.e. before deductions for de-delegation and contribution to the council's statutory and regulatory education functions.

Notes to the tables in Annexes 2 to 4

General:

Data has been anonymised to aid a focus on the approach to take rather than the financial impact on individual schools.

Annexes have been sorted to primary and secondary school groups then by BFC amount per pupil before MFG (column 4), lowest to highest amount, using Option 1 as the starting point. The same schools retain the same reference number for Options 2 and 3.

All budgets are at the total gross amount, so have de-delegation and contribution to LA statutory and regulatory education duties included. All per pupil amounts are shown in accordance with DfE calculation of minimum per pupil amounts i.e. total school budget less rates (which are funded at estimated actual amounts and therefore can distort per pupil funding calculations) less mobility funding (where relevant).

Minimum per pupil funding rates for 2018-19 are £3,300 for primary schools and £4,600 for secondary. Shaded cells indicate funding at or below the minimum amount.

2017-18:

Column 1: DfE baseline removes one-year only funding added in 2017-18 from BF schools budget reserves, adds per pupil funding to schools with SEN Resource Units rather than a separate £4,000 “Element 2” per place allocation from the High Needs Block and removes savings on rates from school academy conversions. Ensures the budget is on a like for like basis with 2018-19 allocations.

2018-19:

Column 2: DfE baseline per pupil amount reflects the funding delivered through the SNFF.

Column 3: Scaled DfE baseline per pupil amount is after the £0.555m top slice required to fund start up and diseconomy funding at new schools.

Column 4: Budget calculation from BFC after the £0.555m top slice required to fund start up and diseconomy funding at new schools and before applying the MFG as per the relevant Option. (Option 1 is close fit to SNFF, Option 2 is current BF funding formula with additional resources allocated in accordance with the general budget strategy, Option 3 is current BF funding formula with additional resources through factors in the same proportion as distributed in 2017-18).

Column 5: The change in per pupil funding from 2017-18 to 2018-19 using the BFC calculation for the relevant Option.

Columns 6-14: Models the impact on each Option of different levels of MFG between the permitted range of 0% and minus 1.5%. 0% offers the most protection to schools experiencing reductions in per pupil funding. Minus figures indicate a deduction from a school, positive means a budget addition. Deductions are taken at an equal amount per pupil from all schools experiencing an increase in per pupil funding except those below the minimum £3,300 or £4,600 per pupil funding amount. Meeting the minimum per pupil amounts takes precedent over the MFG.

Columns 6, 9 and 12 show the deduction or addition from MFG.

Columns 7, 10 and 13 show total final gross budget. So all factors from the funding formula, including rates and mobility. It is before the normal deduction for de-delegated budgets and contribution to LA education related statutory duties.

Columns 8, 11 and 14 show per pupil funding in accordance with DfE calculation of minimum per pupil amounts i.e. total school budget less rates less mobility funding (where relevant).

Option 1: aim for close fit to the indicative 2018-19 SNFF allocation for each school

2017-18 DfE baseline per pupil amount	2018-19													
	DfE baseline per pupil amount	Scaled DfE baseline per pupil amount	BFC per pupil amount before MFG	Per pupil change: BFC to 2017-18 DfE baseline	Option 1: Close fit to SNFF									
					0% MFG			-0.75% MFG			-1.5% MFG			
					Impact of MFG	Budget from BFC	Per pupil amount	Impact of MFG	Budget from BFC	Per pupil amount	Impact of MFG	Budget from BFC	Per pupil amount	
1	2	3	4	5	6	7	8	9	10	11	12	13	14	
Primary School 1	£3,241	£3,332	£3,304	£3,309	£68	-£2,092	£1,879,956	£3,305	-£1,663	£1,880,385	£3,306	-£1,329	£1,880,718	£3,306
Primary School 2	£3,308	£3,399	£3,370	£3,362	£54	-£1,547	£1,435,456	£3,358	-£1,230	£1,435,773	£3,359	-£983	£1,436,020	£3,359
Primary School 3	£3,316	£3,407	£3,378	£3,375	£59	-£1,572	£1,453,001	£3,372	-£1,249	£1,453,323	£3,372	-£999	£1,453,574	£3,373
Primary School 4	£3,296	£3,389	£3,360	£3,375	£79	-£2,305	£2,132,857	£3,372	-£1,833	£2,133,329	£3,372	-£1,465	£2,133,697	£3,373
Primary School 5	£3,318	£3,410	£3,381	£3,378	£59	-£1,553	£1,405,973	£3,374	-£1,235	£1,406,291	£3,375	-£987	£1,406,539	£3,375
Primary School 6	£3,333	£3,427	£3,398	£3,410	£77	-£2,219	£2,052,742	£3,406	-£1,764	£2,053,197	£3,407	-£1,410	£2,053,551	£3,408
Primary School 7	£3,357	£3,452	£3,423	£3,441	£84	-£2,268	£2,109,705	£3,438	-£1,803	£2,110,169	£3,438	-£1,441	£2,110,531	£3,439
Primary School 8	£3,375	£3,469	£3,440	£3,456	£81	-£1,976	£1,844,327	£3,452	-£1,571	£1,844,732	£3,453	-£1,255	£1,845,048	£3,454
Primary School 9	£3,406	£3,499	£3,470	£3,467	£62	-£1,534	£1,458,536	£3,463	-£1,220	£1,458,850	£3,464	-£975	£1,459,095	£3,465
Primary School 10	£3,666	£3,747	£3,715	£3,536	-£130	£49,406	£1,273,175	£3,681	£41,146	£1,264,915	£3,656	£32,886	£1,256,655	£3,632
Primary School 11	£3,551	£3,591	£3,561	£3,576	£26	-£894	£872,661	£3,573	-£711	£872,845	£3,573	-£568	£872,987	£3,574
Primary School 12	£3,587	£3,680	£3,649	£3,641	£54	-£939	£933,530	£3,637	-£747	£933,723	£3,638	-£597	£933,873	£3,639
Primary School 13	£3,594	£3,687	£3,656	£3,654	£60	-£909	£903,565	£3,650	-£723	£903,751	£3,651	-£578	£903,896	£3,651
Primary School 14	£3,624	£3,722	£3,691	£3,658	£34	-£1,242	£1,244,601	£3,654	-£988	£1,244,856	£3,655	-£789	£1,245,054	£3,656
Primary School 15	£3,558	£3,655	£3,624	£3,659	£101	-£1,310	£1,289,065	£3,655	-£1,041	£1,289,333	£3,656	-£832	£1,289,542	£3,657
Primary School 16	£3,605	£3,705	£3,673	£3,669	£64	-£1,485	£1,480,603	£3,666	-£1,181	£1,480,908	£3,666	-£944	£1,481,145	£3,667
Primary School 17	£3,665	£3,698	£3,666	£3,700	£35	-£782	£785,323	£3,697	-£622	£785,483	£3,697	-£497	£785,608	£3,698
Primary School 18	£3,674	£3,692	£3,661	£3,703	£29	-£786	£789,243	£3,699	-£625	£789,404	£3,700	-£499	£789,529	£3,700
Primary School 19	£3,708	£3,722	£3,691	£3,716	£8	£1,626	£722,251	£3,725	-£574	£720,051	£3,713	-£459	£720,166	£3,714
Primary School 20	£3,678	£3,713	£3,681	£3,717	£39	-£775	£782,357	£3,714	-£616	£782,516	£3,714	-£492	£782,639	£3,715
Primary School 21	£3,689	£3,787	£3,755	£3,726	£38	-£1,059	£1,078,367	£3,722	-£842	£1,078,584	£3,723	-£673	£1,078,753	£3,724
Primary School 22	£3,709	£3,751	£3,719	£3,748	£38	-£760	£771,942	£3,744	-£604	£772,098	£3,745	-£483	£772,219	£3,746
Primary School 23	£3,697	£3,793	£3,761	£3,752	£55	-£913	£917,013	£3,748	-£726	£917,200	£3,749	-£580	£917,345	£3,750
Primary School 24	£3,710	£3,782	£3,750	£3,757	£46	-£786	£800,815	£3,753	-£625	£800,976	£3,754	-£499	£801,101	£3,754
Primary School 25	£3,701	£3,790	£3,758	£3,763	£61	-£763	£783,584	£3,759	-£607	£783,740	£3,760	-£485	£783,862	£3,760
Primary School 26	£3,704	£3,807	£3,774	£3,774	£70	-£1,579	£1,627,480	£3,770	-£1,255	£1,627,803	£3,771	-£1,003	£1,628,055	£3,772
Primary School 27	£3,741	£3,807	£3,775	£3,778	£37	-£756	£777,735	£3,775	-£601	£777,890	£3,776	-£480	£778,010	£3,776
Primary School 28	£3,707	£3,804	£3,772	£3,815	£108	-£977	£1,000,178	£3,811	-£776	£1,000,379	£3,812	-£621	£1,000,535	£3,812
Primary School 29	£3,784	£3,838	£3,806	£3,820	£36	-£782	£800,308	£3,816	-£622	£800,468	£3,817	-£497	£800,593	£3,818
Primary School 30	£3,839	£3,932	£3,899	£3,882	£43	-£775	£805,304	£3,879	-£616	£805,462	£3,880	-£492	£805,586	£3,880
Primary School 31	£4,091	£4,196	£4,161	£4,111	£20	-£756	£844,886	£4,107	-£601	£845,041	£4,108	-£480	£845,162	£4,109
Secondary School 1	£4,431	£4,600	£4,561	£4,600	£169	£0	£5,133,800	£4,600	£0	£5,133,800	£4,600	£0	£5,133,800	£4,600
Secondary School 2	£4,488	£4,619	£4,579	£4,600	£112	£0	£3,709,072	£4,600	£0	£3,709,072	£4,600	£0	£3,709,072	£4,600
Secondary School 3	£4,577	£4,711	£4,670	£4,662	£85	-£3,465	£4,502,620	£4,658	-£2,755	£4,503,330	£4,659	-£2,202	£4,503,883	£4,660
Secondary School 4	£4,662	£4,799	£4,758	£4,758	£96	-£5,381	£7,152,039	£4,754	-£4,278	£7,153,142	£4,755	-£3,419	£7,154,001	£4,756
Secondary School 5	£4,997	£5,144	£5,100	£5,070	£73	-£3,375	£4,594,244	£5,067	-£2,683	£4,594,936	£5,067	-£2,145	£4,595,475	£5,068
Secondary School 6	£5,218	£5,349	£5,304	£5,271	£52	-£2,720	£4,031,686	£5,267	-£2,163	£4,032,243	£5,268	-£1,729	£4,032,677	£5,268
Total Primary	£3,523	£3,608	£3,577	£3,577	£54	£14,941	£37,056,538	£3,579	£11,879	£37,053,475	£3,578	£9,494	£37,051,091	£3,578
Total Secondary	£4,703	£4,845	£4,804	£4,804	£101	-£14,941	£29,123,461	£4,801	-£11,879	£29,126,524	£4,802	-£9,494	£29,128,908	£4,802
Grand Total	£3,955	£4,061	£4,026	£4,026	£71	£0	£66,179,999	£4,026	£0	£66,179,999	£4,026	£0	£66,179,999	£4,026

Option 2: continue with the BF Funding Formula, increase all other units of resource in accordance with the budget strategy

2017-18 DfE baseline per pupil amount	2018-19													
	DfE baseline per pupil amount	Scaled DfE baseline per pupil amount	BFC per pupil amount before MFG	Per pupil change: BFC to 2017-18 DfE baseline	Option 2: BF funding formula plus budget strategy									
					0% MFG			-0.75% MFG			-1.5% MFG			
					Impact of MFG	Budget from BFC	Per pupil amount	Impact of MFG	Budget from BFC	Per pupil amount	Impact of MFG	Budget from BFC	Per pupil amount	
1	2	3	4	5	6	7	8	9	10	11	12	13	14	
Primary School 1	£3,241	£3,332	£3,304	£3,304	£63	-£2,284	£1,881,775	£3,308	-£1,950	£1,881,441	£3,308	-£1,617	£1,881,108	£3,307
Primary School 2	£3,308	£3,399	£3,370	£3,380	£72	-£1,689	£1,446,167	£3,384	-£1,442	£1,445,920	£3,383	-£1,195	£1,445,673	£3,383
Primary School 3	£3,316	£3,407	£3,378	£3,377	£62	-£1,716	£1,457,171	£3,381	-£1,465	£1,456,920	£3,381	-£1,215	£1,456,670	£3,380
Primary School 4	£3,296	£3,389	£3,360	£3,349	£53	-£2,517	£2,121,212	£3,353	-£2,149	£2,120,844	£3,352	-£1,781	£2,120,476	£3,351
Primary School 5	£3,318	£3,410	£3,381	£3,379	£61	-£1,696	£1,409,793	£3,383	-£1,448	£1,409,545	£3,383	-£1,200	£1,409,297	£3,382
Primary School 6	£3,333	£3,427	£3,398	£3,391	£58	-£2,423	£2,045,971	£3,395	-£2,069	£2,045,617	£3,394	-£1,715	£2,045,263	£3,394
Primary School 7	£3,357	£3,452	£3,423	£3,422	£65	-£2,476	£2,102,524	£3,426	-£2,114	£2,102,162	£3,425	-£1,752	£2,101,800	£3,424
Primary School 8	£3,375	£3,469	£3,440	£3,433	£59	-£2,158	£1,836,429	£3,437	-£1,842	£1,836,113	£3,437	-£1,527	£1,835,798	£3,436
Primary School 9	£3,406	£3,499	£3,470	£3,469	£63	-£1,675	£1,462,391	£3,473	-£1,430	£1,462,146	£3,472	-£1,186	£1,461,902	£3,472
Primary School 10	£3,666	£3,747	£3,715	£3,512	-£154	£56,518	£1,158,994	£3,348	£48,258	£1,167,254	£3,372	£39,997	£1,175,515	£3,396
Primary School 11	£3,551	£3,591	£3,561	£3,608	£57	-£977	£882,019	£3,612	-£834	£881,876	£3,611	-£691	£881,733	£3,611
Primary School 12	£3,587	£3,680	£3,649	£3,645	£58	-£1,026	£936,357	£3,649	-£876	£936,207	£3,648	-£726	£936,057	£3,647
Primary School 13	£3,594	£3,687	£3,656	£3,654	£60	-£993	£905,434	£3,658	-£848	£905,289	£3,657	-£703	£905,144	£3,656
Primary School 14	£3,624	£3,722	£3,691	£3,685	£61	-£1,357	£1,256,137	£3,689	-£1,158	£1,255,938	£3,689	-£960	£1,255,740	£3,688
Primary School 15	£3,558	£3,655	£3,624	£3,629	£71	-£1,430	£1,281,442	£3,633	-£1,221	£1,281,233	£3,633	-£1,012	£1,281,024	£3,632
Primary School 16	£3,605	£3,705	£3,673	£3,664	£59	-£1,622	£1,481,511	£3,668	-£1,385	£1,481,274	£3,667	-£1,148	£1,481,037	£3,667
Primary School 17	£3,665	£3,698	£3,666	£3,728	£62	-£854	£792,630	£3,732	-£729	£792,505	£3,731	-£604	£792,380	£3,730
Primary School 18	£3,674	£3,692	£3,661	£3,738	£65	-£858	£798,316	£3,742	-£733	£798,191	£3,742	-£607	£798,065	£3,741
Primary School 19	£3,708	£3,722	£3,691	£3,765	£57	-£789	£730,819	£3,769	-£673	£730,703	£3,768	-£558	£730,588	£3,768
Primary School 20	£3,678	£3,713	£3,681	£3,735	£57	-£846	£787,582	£3,739	-£722	£787,458	£3,738	-£599	£787,335	£3,738
Primary School 21	£3,689	£3,787	£3,755	£3,733	£44	-£1,156	£1,082,469	£3,737	-£987	£1,082,300	£3,736	-£818	£1,082,131	£3,736
Primary School 22	£3,709	£3,751	£3,719	£3,772	£62	-£830	£778,416	£3,776	-£708	£778,294	£3,775	-£587	£778,173	£3,775
Primary School 23	£3,697	£3,793	£3,761	£3,786	£90	-£997	£927,341	£3,790	-£851	£927,195	£3,790	-£706	£927,050	£3,789
Primary School 24	£3,710	£3,782	£3,750	£3,772	£61	-£858	£805,624	£3,776	-£733	£805,499	£3,775	-£607	£805,373	£3,775
Primary School 25	£3,701	£3,790	£3,758	£3,766	£65	-£834	£785,973	£3,771	-£712	£785,851	£3,770	-£590	£785,729	£3,769
Primary School 26	£3,704	£3,807	£3,774	£3,767	£63	-£1,724	£1,627,586	£3,771	-£1,472	£1,627,334	£3,770	-£1,220	£1,627,082	£3,770
Primary School 27	£3,741	£3,807	£3,775	£3,799	£58	-£825	£783,480	£3,803	-£705	£783,360	£3,803	-£584	£783,239	£3,802
Primary School 28	£3,707	£3,804	£3,772	£3,765	£59	-£1,067	£989,321	£3,770	-£911	£989,165	£3,769	-£755	£989,009	£3,768
Primary School 29	£3,784	£3,838	£3,806	£3,843	£59	-£854	£806,719	£3,847	-£729	£806,594	£3,846	-£604	£806,469	£3,846
Primary School 30	£3,839	£3,932	£3,899	£3,899	£60	-£846	£810,302	£3,903	-£722	£810,178	£3,902	-£599	£810,055	£3,902
Primary School 31	£4,091	£4,196	£4,161	£4,155	£64	-£825	£855,423	£4,159	-£705	£855,303	£4,159	-£584	£855,182	£4,158
Secondary School 1	£4,431	£4,600	£4,561	£4,600	£169	£0	£5,133,439	£4,600	£0	£5,133,439	£4,600	£0	£5,133,439	£4,600
Secondary School 2	£4,488	£4,619	£4,579	£4,600	£112	£0	£3,708,811	£4,600	£0	£3,708,811	£4,600	£0	£3,708,811	£4,600
Secondary School 3	£4,577	£4,711	£4,670	£4,641	£64	-£3,784	£4,490,292	£4,645	-£3,231	£4,489,739	£4,644	-£2,678	£4,489,186	£4,644
Secondary School 4	£4,662	£4,799	£4,758	£4,728	£66	-£5,876	£7,119,709	£4,732	-£5,017	£7,118,850	£4,731	-£4,158	£7,117,991	£4,731
Secondary School 5	£4,997	£5,144	£5,100	£5,123	£126	-£3,686	£4,649,315	£5,128	-£3,147	£4,648,776	£5,127	-£2,608	£4,648,237	£5,126
Secondary School 6	£5,218	£5,349	£5,304	£5,290	£71	-£2,971	£4,051,104	£5,294	-£2,537	£4,050,670	£5,293	-£2,102	£4,050,235	£5,293
Total Primary	£3,523	£3,608	£3,577	£3,578	£54	£16,316	£37,027,328	£3,576	£13,932	£37,029,712	£3,576	£11,547	£37,032,097	£3,576
Total Secondary	£4,703	£4,845	£4,804	£4,803	£101	-£16,316	£29,152,669	£4,806	-£13,932	£29,150,285	£4,806	-£11,547	£29,147,900	£4,805
Grand Total	£3,955	£4,061	£4,026	£4,026	£71	£0	£66,179,997	£4,026	£0	£66,179,997	£4,026	£0	£66,179,997	£4,026

Option 3: current BF funding formula with additional resources through factors in the same proportion as distributed in 2017-18

2017-18 DfE baseline per pupil amount	2018-19													
	DfE baseline per pupil amount	Scaled DfE baseline per pupil amount	BFC per pupil amount before MFG	Per pupil change: BFC to 2017-18 DfE baseline	Option 3: BF funding formula plus proportional increases									
					0% MFG			-0.75% MFG			-1.5% MFG			
					Impact of MFG	Budget from BFC	Per pupil amount	Impact of MFG	Budget from BFC	Per pupil amount	Impact of MFG	Budget from BFC	Per pupil amount	
1	2	3	4	5	6	7	8	9	10	11	12	13	14	
Primary School 1	£3,241	£3,241	£3,332	£3,301	£60	-£2,323	£1,880,190	£3,305	-£1,989	£1,879,856	£3,305	-£1,655	£1,879,522	£3,304
Primary School 2	£3,308	£3,308	£3,399	£3,377	£69	-£1,718	£1,445,084	£3,381	-£1,471	£1,444,837	£3,381	-£1,224	£1,444,590	£3,380
Primary School 3	£3,316	£3,316	£3,407	£3,375	£59	-£1,745	£1,456,041	£3,379	-£1,495	£1,455,791	£3,378	-£1,244	£1,455,540	£3,378
Primary School 4	£3,296	£3,296	£3,389	£3,346	£50	-£2,560	£2,119,603	£3,350	-£2,192	£2,119,235	£3,349	-£1,824	£2,118,867	£3,349
Primary School 5	£3,318	£3,318	£3,410	£3,376	£58	-£1,725	£1,408,674	£3,381	-£1,477	£1,408,426	£3,380	-£1,229	£1,408,178	£3,379
Primary School 6	£3,333	£3,333	£3,427	£3,388	£55	-£2,464	£2,044,400	£3,392	-£2,110	£2,044,046	£3,392	-£1,756	£2,043,692	£3,391
Primary School 7	£3,357	£3,357	£3,452	£3,419	£62	-£2,518	£2,100,877	£3,423	-£2,157	£2,100,516	£3,422	-£1,795	£2,100,154	£3,422
Primary School 8	£3,375	£3,375	£3,469	£3,430	£56	-£2,194	£1,834,990	£3,435	-£1,879	£1,834,675	£3,434	-£1,564	£1,834,360	£3,433
Primary School 9	£3,406	£3,406	£3,499	£3,466	£60	-£1,704	£1,461,308	£3,470	-£1,459	£1,461,063	£3,469	-£1,214	£1,460,818	£3,469
Primary School 10	£3,666	£3,666	£3,747	£3,510	-£157	£57,482	£1,157,088	£3,342	£49,221	£1,165,349	£3,366	£40,961	£1,173,609	£3,390
Primary School 11	£3,551	£3,551	£3,591	£3,605	£54	-£993	£881,340	£3,609	-£851	£881,198	£3,608	-£708	£881,055	£3,608
Primary School 12	£3,587	£3,587	£3,680	£3,642	£55	-£1,043	£935,688	£3,646	-£893	£935,538	£3,645	-£743	£935,388	£3,645
Primary School 13	£3,594	£3,594	£3,687	£3,651	£58	-£1,010	£904,865	£3,655	-£865	£904,720	£3,655	-£720	£904,575	£3,654
Primary School 14	£3,624	£3,624	£3,722	£3,682	£58	-£1,380	£1,255,169	£3,686	-£1,181	£1,254,970	£3,686	-£983	£1,254,772	£3,685
Primary School 15	£3,558	£3,558	£3,655	£3,626	£68	-£1,455	£1,280,458	£3,631	-£1,246	£1,280,249	£3,630	-£1,037	£1,280,040	£3,629
Primary School 16	£3,605	£3,605	£3,705	£3,661	£56	-£1,650	£1,480,482	£3,665	-£1,413	£1,480,245	£3,665	-£1,176	£1,480,008	£3,664
Primary School 17	£3,665	£3,665	£3,698	£3,725	£59	-£869	£792,067	£3,729	-£744	£791,942	£3,728	-£619	£791,817	£3,728
Primary School 18	£3,674	£3,674	£3,692	£3,735	£62	-£873	£797,724	£3,739	-£747	£797,598	£3,739	-£622	£797,473	£3,738
Primary School 19	£3,708	£3,708	£3,722	£3,762	£54	-£802	£730,267	£3,766	-£687	£730,152	£3,766	-£572	£730,037	£3,765
Primary School 20	£3,678	£3,678	£3,713	£3,732	£54	-£860	£787,100	£3,737	-£737	£786,977	£3,736	-£613	£786,853	£3,735
Primary School 21	£3,689	£3,689	£3,787	£3,730	£42	-£1,176	£1,081,754	£3,734	-£1,007	£1,081,585	£3,734	-£838	£1,081,416	£3,733
Primary School 22	£3,709	£3,709	£3,751	£3,769	£60	-£844	£777,853	£3,773	-£722	£777,731	£3,773	-£601	£777,610	£3,772
Primary School 23	£3,697	£3,697	£3,793	£3,784	£87	-£1,014	£926,655	£3,788	-£868	£926,509	£3,787	-£723	£926,364	£3,786
Primary School 24	£3,710	£3,710	£3,782	£3,769	£58	-£873	£805,025	£3,773	-£747	£804,899	£3,772	-£622	£804,774	£3,772
Primary School 25	£3,701	£3,701	£3,790	£3,764	£62	-£848	£785,403	£3,768	-£726	£785,281	£3,767	-£604	£785,159	£3,767
Primary School 26	£3,704	£3,704	£3,807	£3,764	£60	-£1,754	£1,626,386	£3,768	-£1,502	£1,626,134	£3,767	-£1,250	£1,625,882	£3,767
Primary School 27	£3,741	£3,741	£3,807	£3,796	£55	-£839	£782,918	£3,800	-£719	£782,798	£3,800	-£598	£782,677	£3,799
Primary School 28	£3,707	£3,707	£3,804	£3,763	£56	-£1,085	£988,653	£3,767	-£929	£988,497	£3,766	-£773	£988,341	£3,766
Primary School 29	£3,784	£3,784	£3,838	£3,841	£57	-£869	£806,308	£3,845	-£744	£806,183	£3,844	-£619	£806,058	£3,844
Primary School 30	£3,839	£3,839	£3,932	£3,896	£57	-£860	£809,824	£3,901	-£737	£809,701	£3,900	-£613	£809,577	£3,899
Primary School 31	£4,091	£4,091	£4,196	£4,152	£61	-£839	£854,855	£4,157	-£719	£854,735	£4,156	-£598	£854,614	£4,155
Secondary School 1	£4,431	£4,431	£4,600	£4,600	£169	£0	£5,133,532	£4,600	£0	£5,133,532	£4,600	£0	£5,133,532	£4,600
Secondary School 2	£4,488	£4,488	£4,619	£4,600	£112	£0	£3,708,879	£4,600	£0	£3,708,879	£4,600	£0	£3,708,879	£4,600
Secondary School 3	£4,577	£4,577	£4,711	£4,647	£70	-£3,848	£4,496,543	£4,652	-£3,295	£4,495,990	£4,651	-£2,740	£4,495,437	£4,650
Secondary School 4	£4,662	£4,662	£4,799	£4,734	£72	-£5,976	£7,128,761	£4,738	-£5,117	£7,127,902	£4,738	-£4,259	£7,127,044	£4,737
Secondary School 5	£4,997	£4,997	£5,144	£5,133	£136	-£3,749	£4,658,306	£5,138	-£3,210	£4,657,767	£5,137	-£2,671	£4,657,228	£5,136
Secondary School 6	£5,218	£5,218	£5,349	£5,295	£76	-£3,021	£4,054,926	£5,299	-£2,587	£4,054,492	£5,298	-£2,153	£4,054,058	£5,298
Total Primary	£3,523	£3,523	£3,608	£3,575	£51	£16,594	£36,999,050	£3,573	£14,210	£37,001,434	£3,573	£11,825	£37,003,819	£3,574
Total Secondary	£4,703	£4,703	£4,845	£4,808	£105	-£16,594	£29,180,947	£4,811	-£14,210	£29,178,563	£4,811	-£11,825	£29,176,178	£4,810
Grand Total	£3,955	£3,955	£4,061	£4,026	£71	£0	£66,179,997	£4,026	£0	£66,179,997	£4,026	£0	£66,179,997	£4,026

Indicative units of resource for 2018-19 school budgets

Factor	SNFF	BFC 2017-18	Option 1	Option 2	Option 3
	Units of resource				
Basic per-pupil funding					
Age Weighted Pupil Unit (AWPU): Primary	£2,747	£2,831	£2,799	£2,876	£2,873
Age Weighted Pupil Unit (AWPU): Secondary - KS3	£3,863	£4,060	£4,079	£4,109	£4,116
Age Weighted Pupil Unit (AWPU): Secondary - KS4	£4,386	£4,060	£4,322	£4,109	£4,116
Additional needs funding					
Deprivation					
Current FSM top up (Primary)	£440	£470	£465	£477	£477
Current FSM top up (Secondary)	£440	£1,450	£634	£1,473	£1,462
FSM in the past 6 years (Primary)	£540	£0	£86	£0	£0
FSM in the past 6 years (Secondary)	£785	£0	£249	£0	£0
IDACI band F: Primary	£200	£406	£332	£413	£412
IDACI band F: Secondary	£290	£1,406	£1,359	£1,428	£1,426
IDACI band E: Primary	£240	£609	£430	£619	£618
IDACI band E: Secondary	£390	£2,109	£1,354	£2,142	£2,138
IDACI band D: Primary	£360	£813	£542	£825	£825
IDACI band D: Secondary	£515	£2,812	£2,970	£2,856	£2,851
IDACI band C: Primary	£390	£1,016	£640	£1,031	£1,031
IDACI band C: Secondary	£560	£3,516	£2,048	£3,570	£3,564
IDACI band B: Primary	£420	£1,219	£738	£1,856	£1,855
IDACI band B: Secondary	£600	£4,219	£2,420	£1,856	£1,855
IDACI band A: Primary	£575	£1,422	£914	£4,998	£4,990
IDACI band A: Secondary	£810	£4,922	£2,881	£2,166	£2,164
Low prior attainment					
Low prior attainment: Primary	£1,050	£642	£619	£651	£1,215
Low prior attainment: Secondary	£1,550	£973	£1,035	£988	£987
English as an additional language					
English as an additional language: Primary	£515	£247	£328	£247	£251
English as an additional language: Secondary	£1,385	£247	£617	£247	£251
LAC					
	0	£281	£0	£0	£0
Mobility					
	£0	£315	£315	£315	£315
Lump sum					
Lump sum: Primary	£110,000	£160,000	£161,060	£160,000	£160,000
Lump sum: Secondary	£110,000	£170,000	£145,007	£170,000	£170,000

IDACI is a deprivation measure linked to low family income and a pupil's post code.

Budget Strategy

The Schools Forum has previously agreed a funding strategy to be adopted when setting the Schools Budget, as follows, which in priority order is:

1. It has been included in the financial settlement from the DfE and it is consistent with local funding priorities;
2. It relates to a new or amended statutory responsibility / DfE Regulation;
3. 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;
4. The pressure relates to a key local priority;
5. 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 93.5%/3.3%/3.2% in primary and 89.5%/5.9%/4.6% in secondary).

Outline of LA education related statutory and regulatory duties

In the 2015 Spending Review, the DfE announced a saving of £600m through the complete withdrawal of the ESG which is the mechanism used to fund LAs for their statutory and regulatory education related duties as prescribed in various Education Acts and other relevant statutes. This follows cuts of £200m in 2015-16.

Despite withdrawal of the funding, nothing has changed in terms of the duties and responsibilities on the LA from Education Acts of which the main matters are:

- a) School Improvement, in particular expenditure incurred in connection with functions under the Education and Inspections Act 2008. The LA is required to use statutory powers where schools are under performing. This includes implementing interventions as defined in the Schools Causing Concern document 2016; including Schools that have been judged inadequate by Ofsted, Schools that are coasting, and Schools that have failed to comply with a warning notice. A range of statutory powers are available for the fulfilment of duties, including requiring the governing body to enter into arrangements of additional support, collaboration with other schools, appointing additional governors which includes paying a National Leader of Governance to be a temporary Chair of Governors and establishing an interim executive board which has the power to suspend the delegated budget.

Furthermore, LAs must exercise their education functions with a view to promoting high standards. They need to act as champions of education excellence across schools, to understand the performance of schools, using data to identify those schools that require improvement and intervention, work with the Regional Schools Commissioner to ensure swift and effective action is taken when underperformance occurs in a maintained school, including and using their intervention powers, where this will improve leadership and standards, encourage good and outstanding maintained schools to take responsibility for their own improvement and to support other schools, and enable other schools to access such support.

- b) Expenditure on monitoring National Curriculum assessment arrangements in the EYFS, KS1 and KS2 which includes identifying and training of moderators. Supply cover for schools is provided where moderators are employed. The Standards and Testing Agency also have an expectation that a thorough quality assurance process is in place for visits in schools.
- c) Finance, including preparation of budgets (including the Funding Formula for Schools), making grant claims, completion of statutory accounts, internal and external audit arrangements, managing a school's suspended delegated budget, developing and maintaining the financial framework that schools need to operate within, including the issuing of notice of financial concern and the action and monitoring required thereafter, and providing advice on procurement with a view to securing continuous improvement.
- d) Human Resources, including recruitment, training, continuing professional development, performance management and personnel management of staff, investigations of employees, or potential employees, functions in relation to local government superannuation, advice in relation to staff pay and the management of all such staff, the determination of conditions of service for non-teaching staff, the appointment or dismissal of employees, the investigation and resolution of complaints, liaison and negotiation with trade unions.
- e) Health and safety, including compliance with duties under the Health and Safety at Work etc. Act 1974 and the relevant statutory provisions that are defined and the LAs monitoring the performance role, including the provision of advice.
- f) Legal services relating to the statutory functions of the council.

- g) Planning and reviewing education related services.
- h) Provision of information to, or at the request of the Crown and the provision of other information which the authority is under a duty to make available.
- i) Compliance with the Equality Act 2010, including the LAs monitoring and performance role, including the provision of advice.
- j) Expenditure on establishing and maintaining electronic computer systems, including data storage, which are intended primarily to maintain linkage between local authorities and schools.
- k) Functions in relation to the standing advisory council on religious education including reconsideration and preparation of an agreed syllabus of religious education.
- l) Expenditure on the appointment of governors, the making of instruments of government, and the provision of information to governors. Links to statutory functions set out above in paragraph a).
- m) Education welfare services, including making arrangements to identify children not receiving education, send a written notice to a parent whose child of compulsory school age is not receiving suitable education and subsequent school attendance and education supervision orders, investigate the whereabouts of pupils who have poor attendance and administering and enforcing requirements and protections for those below compulsory school leaving age taking part in employment or performances.
- n) Asset management, including management of the authority's capital programme, preparation and review of an asset management plan, negotiation and management of private finance transactions and contracts (including academies which have converted since the contracts were signed), landlord premises functions for relevant academy leases, health and safety and other landlord premises functions for community schools.
- o) Therapies and other health related services. The Children and Families Act 2014 places a statutory duty on local authorities and local health bodies to commission services jointly to support disabled children and young people and those with special educational needs, including those who need therapy support.

Timetable for the data checking and calculation of the blocks

Date	DfE/ESFA	Local authorities
August 2017	Operational guidance published setting out arrangements for 5-16 mainstream schools implementation for 2018 to 2019. Local authority level baselines published.	
August 2017	Example Authority Proforma Tool (APT) issued to LAs i.e. this is the spreadsheet LAs must complete and return to the DfE, to show the structure of their local funding formula for schools. It shows the key data and resultant detailed budget for every school.	
September 2017	Allocations issued for schools, central school services and high needs blocks	
Autumn 2017	High needs funding guide for 2018 to 2019 issued to local authorities	
5 October 2017	School census day	
October / November 2017	DfE and local authorities check and validate school census	
19 October		Schools Forum considers funding consultation to be undertaken with schools.
30 October to 17 November 2017 (half term 23 – 27 October)		Consultation with BF schools on the proposed funding formula for 2018-19 and other related financial matters
30 November 2017	School census database closed	Deadline for submitting requests for: <ul style="list-style-type: none"> • local adjustments to the standard MFG calculation • exceptional premises factors • sparsity factors • lump sum variations for amalgamating schools • pupil number reductions • movement of funding out of the schools block above the limit of 0.5% and/or which the schools forum has not approved

Date	DfE/ESFA	Local authorities
7 December 2017		Schools Forum considers responses to November consultation and makes initial decisions on the 2018-19 budget for schools
Mid-December 2017	<p>APT issued to local authorities, containing October 2017 census-based pupil data and factors</p> <p>Publication of DSG schools block and high needs block allocations for 2018 to 2019 (prior to academy recoupment)</p> <p>Publication of provisional early years block allocations</p>	
By 20 December 2017 (end of term)		Indicative 2018-19 budgets sent to schools
18 January 2018		Schools Forum makes recommendations to Executive Member on final decisions for the 2018-19 budget for schools
19 January 2018		Executive Member for CYPL makes final decisions on 2018-19 budget for schools
19 January 2018		Deadline for submission of final 2018 to 2019 APT to ESFA
28 February 2018		Deadline for confirmation of 2018-19 schools budget shares to mainstream maintained schools
February/March 2018	2018 to 2019 allocations to post-16 institutions, academies and NMSS to be issued	
February 2018	Publication of 2018 to 2019 high needs place numbers at institution level	
30 March 2018	Confirmation of 2018 to 2019 general annual grant for academies open by 9 January 2018	
April 2018	First DSG payments to local authorities based on 2018 to 2019 allocations, net of academies recoupment (DSG allocations updated termly for in year academy conversions), FE high needs place funding deductions and other adjustments	
Summer 2018	Early years DSG block updated for January 2018 early years pupil numbers	

Date	DfE/ESFA	Local authorities
Summer 2019	Early years DSG block updated for January 2019 early years pupil numbers (pro rata 7/12ths as this relates only to the period September 2018- March 2019)	

Note: a number of the actions can only be completed by the indicated dates provided all schools successfully submit their census data on time and the DfE releases key information by the expected dates.