

To: Schools Forum  
Date: 20 June 2024

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**2023-24 Funding Allocations to mainstream schools from  
Budgets Centrally Managed by the Council  
Executive Director - People**

**1 Purpose of report**

- 1.1 The purpose of this report is to present information on the in-year allocation of funds to mainstream schools through School Specific Contingencies and other budgets that are funded from the Dedicated Schools Grant (DSG) and in the first instance centrally managed by the council. It also presents the opportunity to amend existing funding policies. These funds relate only to mainstream schools.

**2 Executive Summary**

- 2.1 The funds used to provide targeted support to schools meeting qualifying criteria allocated £0.561m in 2023-24, an overall under spend of £0.168m. This helps to fund unpredictable and sometimes significant additional costs that only a small number of schools face and which the simplified national funding formula lacks the required sensitivities.
- 2.2 The associated policies provide consistency and transparency of operation. Reflecting on the changes agreed through the 2023 financial consultation with schools, revised policy text is presented for approval relating to the Growth Fund and Key Stage 1 class sizes. Furthermore, the significantly changing SEN data indicates the need to update the SEN contingency policy. All other policies are generally considered appropriate and fit for purpose with only minor changes for reasons of clarification and updating new funding rates being proposed.

**3 Recommendations**

**The Forum notes:**

- 3.1 **The following funding allocations to schools, made in accordance with approved policies;**
1. **£0.185m for significant in-year increases in pupils (paragraph 6.9);**
  2. **£0.128m for schools required to meet the Key Stage 1 Class Size regulations (paragraph 6.12);**
  3. **£0.023m for new and expanding schools (paragraph 6.17);**
  4. **£0.114m for schools with a disproportionate number of SEN pupils (paragraph 6.20);**
  5. **£0.112m for schools in financial difficulty (paragraph 6.30);**

### **3.2 The Forum agrees the following:**

- 1. Updated policy text for the Growth Fund**
- 2. Removal of the Key Stage 1 class size policy**
- 3. Updated text for the SEN Contingency**
- 4. Minor changes to text to improve clarity of policy and the updating of funding rates where relevant (paragraph 6.33).**

### **4 Reasons for recommendations**

- 4.1 To ensure that the Schools Forum supports how centrally managed funds have been allocated to mainstream schools and is aware of the total amount and schools involved.

### **5 Alternative Options Considered**

- 5.1 These were considered as part of the budget setting process, including not setting aside contingency funds with the policy text updates consistent with the decisions made and emerging information.

### **6 Supporting Information**

#### Background

- 6.1 Members of the Forum will be aware that the funding framework for mainstream schools is regulated by the DfE and that this governs the conditions attached to how funds can be allocated to schools. It also sets out the purposes for which funds can be centrally managed by LAs and how in-year allocations can be determined.

- 6.2 As part of the 2023-24 budget setting process, the Forum agreed that the following six budgets should initially be managed by the LA, for in-year allocation to schools:

1. The Growth Fund: Comprising:
  - a. significant in-year increases in pupil numbers;
  - b. schools required to meet the Key Stage 1 Class Size regulations;
  - c. new and expanding schools.
2. SEN specific contingency;
3. General Schools Contingency: Comprising:
  - a. Schools in financial difficulty;
  - b. General Schools Contingency.

- 6.3 In accordance with the funding framework, items 1 and 2 above are held as centrally managed budgets, available to support both maintained and academy schools.

Item 3 is a de-delegated budget and supports maintained mainstream schools only. De-delegated funding is initially included in individual school budget allocations, but returned from maintained schools for central management, following consultation with schools and agreement of the Schools Forum.

Maintained schools that meet the agreed qualifying criteria then receive in-year funding allocations, whereas academy schools retain their relevant share of the funds to directly manage associated responsibilities.

Where de-delegated budgets in aggregate underspend in a financial year, the relevant amount is returned to mainstream maintained schools as a refund.

6.4 This annual report is presented to confirm individual funding allocations and to provide an opportunity to review the relevant funding policies.

1. Growth Fund allocations - £535,500 total budget (applies equally to maintained mainstream schools and academies that meet qualifying criteria).

a. Significant in-year increases in pupil numbers - £343,000 budget

6.5 To provide in-year financial support to schools experiencing significant increases in statutory aged pupil numbers, LAs are permitted to retain funding in a Growth Fund for allocation once qualifying criteria is met. This reflects the requirement of the DfE to calculate school budgets on actual pupil numbers prior to the start of the financial year which means there is no recognition of in-year increases which in some cases will have a significant impact on costs.

6.6 To provide additional resources to schools facing in-year increases, the Schools Forum has agreed that funding allocations should be made where there is a significant increase in pupils between the census point used for funding school budgets and the actual intake at the start of the next academic year. The relevant thresholds and funding rates are:

- less than 2 FE schools = increase of 10 pupils, at half the core funding rate
- 2 FE schools = increase of 20 pupils, at the core funding rate
- 3 FE and above schools = increase of 25, at the core funding rate

6.7 Admitting additional pupils at these levels is considered the point at which relevant schools would most likely experience significant cost increases. The general expectation is that schools can absorb additional pupils up to these numbers without having to incur any significant cost increases.

6.8 The core funding allocation is based on the cost of employing a Teacher at Main Scale Point 6 for the autumn and spring terms only (£33,568 in 2023-24). This is a short-term funding measure as on-going funding beyond this point would be included in the next year's budget as relevant pupils would be on the October census used for funding purposes and are therefore taken into account in the next year's budget calculation. Annex 1 sets out the current policy.

6.9 Total allocations amounted to £184,624 with a resultant under spending of £158,376. Annex 2 sets out individual school calculations and other relevant data.

6.10 In setting the 2024-25 Schools Budget, the Schools Forum agreed that the Growth Fund should in future be limited to supporting schools where there is agreement with the council to the need to open a new class to meet forecast demand arising from basic need, either on a temporary or permanent basis. Outline text was presented to the Forum in December and is represented unchanged now for formal approval at Annex 1.

b. Schools required to meet the Key Stage 1 Class Size regulations - £170,000 budget

6.11 In a similar way to that in which funds can be retained for allocation in year to schools experiencing significant increases in pupil numbers, LAs are also permitted to create a

contingency to allocate funds to support schools facing additional costs to ensure Key Stage 1 class size regulations to limit classes to no more than 30 pupils per teacher are not breached. Again, this allows the targeting of funds to schools facing pressures that the Funding Formula does not ordinarily recognise.

- 6.12 Based on actual changes in pupil numbers for the 2023 summer and autumn terms, and the spring term 2024, 5 schools were entitled to additional funding, which aggregates to £127,740 resulting in an under spending of £42,260. Annex 4 sets out individual school allocations and other relevant data.
- 6.13 To avoid double funding, if the same pupils result in schools receiving funding through the *significant in-year increase in pupil numbers* category then any Key Stage 1 specific funding is disallowed. The relevant qualifying criteria are set out in Annex 3.
- 6.14 In setting the 2024-25 Schools Budget, the Schools Forum agreed that funding would no longer be provided for Key Stage 1 Class Size regulations. The Growth Fund would in future be limited to supporting schools where there is agreement with the council to the need to open a new class to meet forecast demand arising from basic need, either on a temporary or permanent basis. Therefore, this funding policy ceased with effect from April 2024.

*c. New and expanding schools - £22,500 budget.*

- 6.15 The policy for start-up and diseconomy funding for new and expanding schools received a comprehensive refresh in December 2019 and with no further new builds anticipated, no further changes to the policy are expected which can be viewed here: [Policies and Guidance Notes | Can-Do | Bracknell Forest \(bracknell-forest.gov.uk\)](#).
- 6.16 In respect of diseconomy funding – intended to support general running costs when schools have significantly fewer pupils than their capacity - this was allocated through the BF Funding Formula for Schools and relates only to Kings Academy Binfield (Primary phase).
- 6.17 For post-opening costs which is intended to provide a lump sum amount of £7,500 to equip each new class that is to open with day-to-day resources. Binfield and Oakwood Primary schools opened new classes at September 2023, with 2 in Binfield and 1 in Oakwood.

Total payments for new and expanding schools were therefore on budget at £22,500.

2. SEN specific contingency - £81,510 budget (applies equally to maintained mainstream schools and academies that meet qualifying criteria. This is the only budget in this report that is funded from the High Needs Block).

- 6.18 The DfE permits LAs to allocate additional resources to schools that admit a disproportionate number of pupils with SEN with a clear expectation that the distribution methodology should be simple and transparent, and devised so that additional funds are targeted only to a minority of schools which have particular challenges because of their disproportionate number of pupils with SEND or high needs, or their characteristics. The rationale of the contingency is that the normal operation of the simplified Funding Formula does not adequately resource schools for all costs when there is a large concentration of high needs pupils and inclusion of pupils into mainstream schools rather than specialist provider.

- 6.19 There is no prescribed methodology on how such a fund should work and the scheme agreed by the Forum following consultation schools requires schools to meet both of the following criteria:
1. Where the proportion of pupils on roll classified as high need exceeds 4% of total pupil numbers in a primary school and 2% in a secondary school, and
  2. Where the proportion that top up funding paid to support High Needs pupils compared to the total budget allocated via the BF Funding Formula exceeds 2% in a primary school and 1% in a secondary school.

Qualifying schools would then receive £1,100 per pupil with an EHCP.

- 6.20 This resulted in 5 schools receiving in total £114,366 in additional funding (was £95,700 in 2022-23 for 4 schools), resulting in an overspending of £32,856. Relevant schools were informed of their budget allocation prior to the commencement of the financial year.
- 6.21 In completing the calculations for 2024-25, there has been a significant increase in the number of schools qualifying for funding top ups which would significantly exceed the available budget. Initial calculations indicated that 13 schools would receive £337,700 compared to a budget of £104,510 an indicative over spending of £233,190. The finalisation of these allocations has therefore been delayed allowing development of alternative options that are both affordable to the budget and sufficiently target only the schools with the greatest challenges with pupils in receipt of an EHCP.
- 6.22 A significant part of the increase in eligible schools arises from the change in data set used to calculate the number of ECP allocations. The current calculation uses the period a pupil is expected to be on roll, so includes part year data only for pupils transitioning from primary to secondary schools. However, using actual headcount data is considered the most appropriate data set to ensure all pupil year groups are equally represented.
- 6.23 In light of these latest calculations, together with the increase in number of pupils in receipt of an EHCP, it is appropriate to review the eligibility thresholds and to also ensure the policy is affordable to the budget.
- 6.24 In order to retain the simple and transparent allocation process required by DfE, the following approach is recommended to be adopted for allocating funding:
1. Number of pupils on roll with an EHCP to exceed 4% for primary aged pupils and 3.5% for secondary aged pupils.
  2. Number of schools to qualify for funding to be limited to no more than 15% in total, by phase (5 primary and 1 secondary). Where more than 15% of schools qualify under 1. above, schools to receive funding will be those with the highest proportion of pupils with an EHCP.
  3. Total funding allocation to be capped to available budget by scaling the uniform per pupil with an EHCP funding rate.

The policy wording proposed for 2024-25 has been set out in Annex 5, together with confirmation of the 2023-24 allocations to schools, and an illustration of the proposed 2024-25 allocations. For comparison, the 2024-25 data has also been modelled to illustrate the likely allocation of funds to schools if the policy applied to 25% of schools, rather than the recommended 15%.

3. Schools Contingency: (this is a de-delegated budget and applies only to maintained schools when eligibility criteria met)
- a. Schools in Financial Difficulty - £151,560 budget
- 6.25 School Funding Regulations allow for additional funds outside the normal operation of the Funding Formula to be provided to schools considered to be in financial difficulty. In agreement with the Schools Forum, this de-delegated budget has been returned to the Council for central management. The agreed criteria to be used to allocate this funding is if, in the opinion of the relevant Director for schools and Director responsible for Finance, a school:
1. was unable to set a balanced budget and were in need of a loan arrangement at the start of the relevant financial year, and/or
  2. was likely to fall into one of the categories of causing concern, including requires improvement and special measures without additional financial support.
  3. was a 1 form of entry school judged good or better that has more than 5% empty places
- 6.26 Where a school enters or is deemed at risk of entering an Ofsted category of concern, this includes those schools judged to be inadequate or requiring improvement, the LA holds a declaration of concern meeting (DoC) and establishes a Rapid Response Board (RRB) for the first 12 weeks. Where effective action is being taken this is then monitored through a Standards Monitoring Board (SMB) on a termly basis. Where required there is an independent chair and senior officers of the LA as members. The headteacher and Chair of Governors of the school are invited to attend the SMB to report on progress. A support plan outlines the actions to be taken by the school and the LA in order to effect rapid improvement.
- 6.27 In order to allow funds to be allocated within an appropriate time scale, the Forum has agreed to delegate a set of powers to the Director responsible for schools to allocate funds up to but not exceeding £0.15m in any financial year, dependent on the Ofsted category of the school, or where there is considered a risk of being placed in a category.
- 6.28 The level of allocation of funds would be:
1. schools judged to have serious weaknesses (up to £20k per year)
  2. schools deemed to be in need of special measures (up to £50k per year)
  3. schools at risk of being judged to require improvement, have serious weaknesses or entering special measures (up to £30k per year)
  4. 1 form of entry schools judged good or better that have more than 5% empty places (up to £20k per year per school and £40k in total)
- 6.29 Allocations will only be agreed where the relevant school has demonstrated insufficient funds exist within the budget to fund the required actions or activities. The full policy text is set out in Annex 6 which is proposed to remain unchanged.
- 6.30 Funding allocations for the year amounted to £111,830 which represented an under spending of £39,730. This under spending was returned to maintained schools as part of the agreed financial year-end process to repay any aggregate unspent de-delegation funding to maintained schools.

Further details of the allocations to schools in financial difficulty are shown in Annex 7.

*b. General Schools Contingency - £8,960 budget*

- 6.31 Where a primary school faces exceptional, unexpected costs in-year that were not known when the budget was set and it would be unreasonable to expect the school to meet the costs, bids for additional funding can be sought. The Forum has previously agreed that claims are considered on a case by case basis by the Heads of Service covering Finance, Human Resources and Property before formal consideration by the Forum.
- 6.32 No claims were submitted in the year. The full criteria for making allocations from the General School Contingency is set out at Annex 8 which is proposed to remain unchanged.

Qualifying criteria used to make funding allocations

- 6.33 To ensure that a consistent and transparent approach is adopted to the allocation of contingency funding to schools, the Forum has agreed a set of eligibility criteria to be applied, and these are attached as annexes to the report. Relevant policies are included in annexes 1, 3, 5, 6 and 8.

Conclusion

- 6.34 The funds approved by the Forum to be held by the LA allow for appropriate in-year targeting of resources that is not possible through the simplified Funding Formula for Schools. Current arrangements are considered appropriate and ensure that financial support is provided when needed and that clear and consistent criteria is applied in the allocation of resources.

**7 Advice received from statutory and other officers**

Borough Solicitor

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

Director of Resources: Finance

- 7.2 The financial implications arising from this report are set out in the supporting information. The allocations meet the requirements of the appropriate funding regulations, the agreed policies and have been taken into account in the financial monitoring arrangements for the Schools Budget.

Equalities Impact Assessment

- 7.3 None identified.

Strategic Risk Management Issues

- 7.4 None identified.

Climate Change Implications

- 7.5** The recommendations from this report will have no impact on emissions of carbon dioxide as they generally relate to on activities already undertaken.

### Health and wellbeing considerations

- 7.6 The recommendations from this report will have no impact on health and wellbeing as they report on activities already undertaken.

## **8 CONSULTATION**

- 8.1 None.

### Background Papers

None

### Contact for further information

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### Doc. Ref

[https://bfcouncil.sharepoint.com/sites/fina/bpm/FIBPSCB-FIN9.6/Schools Forum/\(123\) 200624/2023-24 Funding Allocations from the Schools Contingency.docx](https://bfcouncil.sharepoint.com/sites/fina/bpm/FIBPSCB-FIN9.6/Schools Forum/(123) 200624/2023-24 Funding Allocations from the Schools Contingency.docx)



## **Criteria for in-year budget allocations to schools experiencing significant growth in pupil numbers**

### **Policy for 2023-24**

This element of the Growth Fund is ring fenced so that it is only used for the purpose of supporting growth in pre-16 pupil numbers to meet basic need<sup>2</sup>. The fund will be for the benefit of both maintained and Academy schools. For Academy Schools, the funding is for an academic year.

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

To assist schools in meeting the additional costs arising in such circumstances, an in-year budget addition will be made where the whole school number on roll from Reception up to Year 11 increases up to the point that significant additional costs are expected to be incurred.

The relevant thresholds for additional funding are:

- less than 2 FE schools = 10
- 2 FE schools = 20
- 3 FE and above schools = 25

With the exception of less than 2 FE schools, the amount of additional funding is calculated from the cost of appointing a teacher on Main Scale Point 6 – salary and employer on-costs - for the period September to March.

Less than 2 FE schools will be funded at half the value of other schools sizes, to reflect the lower additional costs expected to be incurred i.e. it is not expected that such schools would ever need to open a new class and recruit a new teacher.

To calculate whether a school is eligible, the following checks will be carried out:

- For the year of entry, the calculation of additional pupils will be capped at the lower of the actual number admitted or the Published Admission Number (PAN), other than where the need to exceed PAN is agreed in advance with the LA.
- Pupil admissions from parental appeals, LAC pupils and pupils with an EHCP are included in the number on roll when checking that a school has not exceeded its PAN in year of entry; these admissions are generally known by May preceding the start of the academic year.
- Schools can request that the Assistant Director: Education and Learning of Education considers additional funding in exceptional circumstances. These will be considered on an individual case basis.
- An appeal to a decision of the Assistant Director: Education and Learning can be made to the Executive Director: People, whose decision will be final.

For schools that qualify for this factor the calculation is unchanged from the current methodology that compares the total NOR for statutory aged pupils on roll for the

October census in the current financial year with that of the October Census number on roll in the previous financial year.

Where a school does admit pupils above PAN without agreement of the LA, the calculation for a significant growth in pupil numbers will exclude pupils in the year of entry.

There are 2 exceptions to the general policy.

1. This relates to schools that agree with the LA to open a 'surge' class – i.e. one additional class to accommodate up to 30 additional pupils – where additional funding will be allocated irrespective of the actual number of pupils admitted, if the pupils in the 'surge' class are admitted after the census used for funding purposes. The funding allocation will be calculated in the same way as for general in-year growth, applied from the beginning of the term that the 'surge' class is open, [i.e. rather than against the number of months the 'surge' class is open].

Where a 'surge' class opens after the census point used for calculating the school's budget for the next financial year, a further funding top-up will be made to cover the full year cost of a teacher on Main Scale Point 6 and a Learning Support Assistant on Bracknell Forest pay point 12 for the relevant financial year. This funding will be made available for one year only at the commencement of the relevant financial year.

2. This relates to those schools that expand by a whole form of entry. As the current calculation is based on the form of entry at admission, it assumes those schools expanded by a whole form of entry are immediately admitting to all year groups at the increased capacity, when in reality, the increased capacity starts in the entry year, and takes 7 years (5 for a secondary school) to work through the school until admission to full capacity is possible. In order to make a fair calculation of the threshold to be used to calculate in-year growth allowances in these circumstances, the threshold to be used to calculate a growth allowance is calculated on the number of classes available at the census point used to calculate the original budget.

For example, a primary school moving from a 2 form to 3 form entry school has 3 classes in reception in the first year after expansion, and 2 classes in other year groups. The funding threshold for a 2-form entry school is 20 with 25 used for 3 form entry schools. In the first year following expansion, eligibility to growth allocations would be calculated on reception classes at the 25-number threshold, with all other classes at a threshold of 20. For the second year, Reception and Year 1 would be calculated on a 25 threshold, all other year groups on 20 and so on. A full illustration of the calculation is set out below and shows how the funding threshold rises gradually, in line with the phased increase in pupil numbers, starting at 21, and rising to 25 after 7 years.

**Approved by the Schools Forum on 22 June 2023.**

## **Proposed Growth Fund policy for 2024-25 – as originally reported to Schools Forum in December 2023**

This element of the Growth Fund is ring fenced so that it is only used for the purpose of supporting growth in pre-16 pupil numbers to meet basic need<sup>1</sup>. The fund will be for the benefit of both maintained and Academy schools. For Academy Schools, the funding is for an academic year.

The growth fund will provide additional funding, at the minimum values set by the Department for Education (2024-25 value is £0.049m for September to March for maintained schools, to reflect the financial year basis that budgets are calculated, and £0.084m for academy schools as their funding is based on an academic year, with a delay compared to maintained schools in updating budgets to reflect increases in pupil numbers. ESFA directly funds the cost difference for an academy school, not the LA).

Qualifying criteria are as follows:

1. Schools that agree with the LA to open a 'surge' class – i.e. one additional class to accommodate up to 30 additional pupils – where additional funding will be allocated irrespective of the actual number of pupils admitted, if the pupils in the 'surge' class are admitted after the census used for funding purposes. The funding allocation will be calculated in the same way as for general in-year growth, applied from the beginning of the term that the 'surge' class is open, [i.e. rather than against the number of months the 'surge' class is open.
2. Schools that agree with the LA to open additional classes forecast by the LA as being required to meet basic needs. This typically relates to new schools opening on a phased in-take basis, opening to age of admission only to ensure minimal impact on pupil numbers of all ages on roll at pre-existing schools that would otherwise be subject to transfer to the new school.
3. Discretion for the relevant Executive Director to consider making adjustments to the funds allocated to schools in exceptional circumstances. Any changes would subsequently be reported to the Schools Forum.

## 2023-24 Funding allocations for significant in-year growth in pupil numbers

Threshold 10 for schools with less than 2 Forms of entry							
Threshold 20 for schools with 2 Forms of entry							
Threshold 25 for schools with 3 and more Forms of entry							
School	No. of Forms of entry - rounded	Total places available- Sept 2023	NOR October 2022 Census	NOR October 2023 Census	Change in NOR	Revised threshold	Amount
Ascot Heath Primary	2	420	392	395	3	20	£0
Binfield CE Aided Primary	2	420	409	412	3	20	£0
Birch Hill Primary	2	420	394	387	-7	20	£0
College Town Primary	3	630	470	450	-20	25	£0
Cranbourne Primary	1	210	202	188	-14	10	£0
Crown Wood Primary	3	630	557	570	13	25	£0
Crowthorne CE Primary	1	210	209	208	-1	10	£0
Fox Hill Primary	1	210	200	195	-5	10	£0
Great Hollands Primary (1)	1 to 2	390	262	253	-9	16	£0
Harmans Water Primary (1)	3 to 2	540	430	412	-18	23	£0
Holly Spring Primary	3	630	594	592	-2	25	£0
Jennetts Park Primary	2	420	378	387	9	20	£0
Kings Academy Primary (2)	1 to 2	210	154	213	59	10	£0
Meadow Vale Primary	3	630	592	572	-20	25	£0
New Scotland Hill Primary	1	210	190	198	8	10	£0
Kings Academy Oakwood	1	210	178	210	32	10	£33,568
Owlsmoor Primary	3	630	508	504	-4	25	£0
The Pines Primary and Nursery (1)	2 to 1	300	300	300	0	14	£0
Sandy Lane Primary	3	630	444	403	-41	25	£0
St Joseph's Catholic Primary	1	210	211	211	0	10	£0
St Margaret Clitherow Catholic Pry	1	210	202	199	-3	10	£0
St Michael's Easthampstead CE	1	240	215	196	-19	10	£0
St Michael's CE Aided Pry (Sand't)	1	210	191	195	4	10	£0
Uplands Primary	1	210	209	210	1	10	£0
Warfield CE Primary	2	420	415	416	1	20	£0
Whitegrove Primary	2	420	420	419	-1	20	£0
Wildmoor Heath	1	210	201	211	10	10	£16,784
Wildridings Primary	2	420	388	395	7	20	£0
Winkfield St Mary's CE Primary	1	210	198	198	0	10	£0
Wooden Hill Primary & Nursery	2	350	371	373	2	20	£0
The Brakenhale	7	1,050	1,043	1,044	1	25	£0
Easthampstead Park	8	1,200	855	896	41	25	£33,568
Edgbarrow	8	1,200	1,114	1,111	-3	25	£0
Garth Hill College	9	1,440	1,264	1,286	22	25	£0
Kings Academy Secondary	7	1,050	866	950	84	25	£100,704
Ranelagh CE	5	750	866	868	2	25	£0
Sandhurst	7	1,050	1,028	1,030	2	25	£0
<b>Total Primary</b>	<b>51</b>	<b>11,060</b>	<b>9,884</b>	<b>9,872</b>	<b>-12</b>	<b>493</b>	<b>£50,352</b>
<b>Total Secondary</b>	<b>51</b>	<b>7,740</b>	<b>7,036</b>	<b>7,185</b>	<b>149</b>	<b>175</b>	<b>£134,272</b>
<b>Total All Schools</b>	<b>102</b>	<b>18,800</b>	<b>16,920</b>	<b>17,057</b>	<b>137</b>	<b>668</b>	<b>£184,624</b>

(1) schools being expanded/contracting have variable funding thresholds relative to the number of new classes available.

(2) new schools are separately funded for pupil growth and the totals exclude any amounts.

**Criteria for in-year budget allocations to schools to meet unavoidable costs arising from the Key Stage 1 class size regulations that limit classes to no more than 30 pupils per teacher**

**Policy for 2023-24**

The Growth Fund shall include funding for an allocation to those schools that experience unavoidable costs arising from the Key Stage 1 class size regulations that are not resourced through the Funding Formula.

Numbers in reception, Year 1 and Year 2 will be collected termly from the relevant school census to determine the total number of pupils in each school affected by the relevant Regulations. Where the aggregate number of pupils does not equate to a multiple of 30, additional resources will be added at the amount required to cover the cost of appointing a teacher on Main scale Point 6 – salary and employer on-costs - for the relevant period, after taking account of the minimum funding delivered through the Funding Formula. The minimum amount of per pupil funding delivered through the BF Funding Formula is based on the Minimum Per Pupil Funding amount (MPPFL) as determined by the Department for Education. The MPPFL calculation includes all funding delegated to schools through the BF Funding Formula with the exception of business rates. Funding will be added on a “missing pupil” basis.

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

An illustration of the funding calculation is as follows which would need to be updated each year to reflect budget decisions and the cost of employing a teacher (all units of resource are based on values at the start of 2022-23 financial year):

- a. The per pupil funding rate is assumed to be the Minimum per pupil funding rate for 2022-23 this is £4,265 (A)
- b. The cost of a teacher on Main scale Point 6 – salary and employer on-costs - is £54,000 (B)
- c. To have sufficient income from the Funding Formula to employ a teacher, a school needs  $\text{£54,000 (B) / £4,265 (A) = 13 pupils (C)}$
- d. The Funding Formula therefore provides sufficient funding to appoint a teacher provided there are 13 pupils. The maximum top-up funding a school can receive is for 12 ‘missing’ pupils (C).
- e. Therefore where the actual number on roll exceeds a multiple of 30 compared to the number on roll funded in the original budget the school would be entitled to top-up funding if this is below 13.
- f. Funding will be added, pro rata per term, for each missing pupil

The attached Annex sets out funding top-up rates, based on the cost of employing a teacher at £54,000 and the BF Funding Formula delivers sufficient funding to appoint a teacher provided there are 13 or more pupils above the 30 multiples. These factors and amounts are subject to annual re-calculation.

Children admitted **in-year** as an “excepted pupil” in accordance with The School Admissions (Infant Class Sizes) (England) Regulations 2012, or other relevant legislative requirement will not be included in the calculation for top up funding as they will not impact on the need to

recruit a teacher. The exclusion will apply for the full period the child is on roll at the school to the end of Key Stage 1.

“Excepted pupils” currently include those that are admitted to the school outside a normal admission round:

- as a result of the local authority specifying the school in the child’s statement;
- are looked after;
- were in error initially refused admission;
- are from a service family.

“Excepted pupils” on the roll of a school at the October census will generate per pupil funding for a school in the next budget. These funds will be taken into account in any top up funding calculations.

Separate calculations will be made each term, based on data obtained from the relevant census.

Exceptions:

There are two exceptions to the general rule set out above:

1. In order to avoid double funding, a school will not be eligible for Key Stage 1 class size funding in the autumn and spring terms where the school has qualified of an in-year growth allowance for these pupils.
2. When a school is funded on the basis of estimated actual costs, which is ordinarily a new school or one that opens additional forms of entry during a financial year, it will not be entitled to any top up funding from the Key Stage 1 class size contingency, provided funds for the additional costs that will arise are allocated from an alternative source.

Pupils on roll at a Special Resource Provision are excluded from the calculation.

**Approved by the Schools Forum on 23 June 2022.**

**Policy to be withdrawn. No funding in future to be allocated to support Key Stage 1 class size regulations.**

**2023-24 Funding allocations to support schools needing to meet the  
Key Stage 1 Class Size Funding regulations**

School	Total KS1 pupils funded October 2022 Census	K.S 1 Allocation summer term 2023	K.S 1 Allocation autumn term 2023	K.S 1 Allocation spring term 2024	Total
Ascot Heath Primary	161	£3,670	£2,940	£2,200	£8,810
Binfield CE Primary	171	£0	£0	£0	£0
Birch Hill Primary	159	£7,340	£5,870	£4,410	£17,620
College Town Primary	206	£0	£0	£0	£0
Cranbourne Primary	88	£0	£0	£0	£0
Crown Wood Primary	249	£7,340	£5,870	£4,410	£17,620
Crowthorne CE Primary	89	£0	£0	£0	£0
Fox Hill Primary	88	£0	£0	£0	£0
Great Hollands Primary	87	£0	£0	£0	£0
Harmans Water Primary	171	£0	£0	£0	£0
Holly Spring Primary	243	£18,350	£14,680	£11,010	£44,040
Jennetts Park CE Primary	148	£0	£0	£0	£0
Meadow Vale Primary	236	£0	£0	£0	£0
New Scotland Hill Primary	80	£0	£0	£0	£0
Oakwood Primary	90	£0	£0	£0	£0
Owlsmoor Primary	203	£0	£0	£0	£0
Pines (The)	84	£0	£0	£0	£0
Sandy Lane Primary	147	£0	£0	£0	£0
St. Joseph's Catholic Primary	90	£0	£0	£0	£0
St. Margaret Clitherow Catholic Pry	85	£0	£0	£0	£0
St. Michael's E'stead CE Aided Pry	81	£0	£0	£0	£0
St. Michael's CE Primary, Sandhurst	87	£0	£0	£0	£0
Uplands Primary	90	£0	£0	£0	£0
Warfield CE Primary	175	£0	£0	£0	£0
Whitegrove Primary	180	£0	£0	£0	£0
Wildmoor Heath	85	£0	£0	£0	£0
Wildridings Primary School	154	£16,520	£13,220	£9,910	£39,650
Winkfield St. Mary's CE Primary	82	£0	£0	£0	£0
Wooden Hill Primary & Nursery	165	£0	£0	£0	£0
<b>Total Allocation</b>	<b>3,974</b>	<b>£53,220</b>	<b>£42,580</b>	<b>£31,940</b>	<b>£127,740</b>

## 2023-24 termly allocation detail for Key Stage 1 Class Size Funding

Ref	School	Data used for original budget			Summer Term data					Autumn Term data					Spring budget data					Ref
		KS1 pupils as at October 2022	Number of classes that can be funded	Number of pupils above multiple of 30	KS1 pupils as at May 2023	Number of classes needed	Additional classes needed	Number of 'missing pupils' needed to fund extra class	KS1 Allocation summer term	KS1 pupils as at October 2023	Number of classes needed	Additional classes needed	Number of 'missing pupils' needed to fund extra class	KS1 Allocation autumn term	KS1 pupils as at January 2024	Number of classes needed	Additional classes needed	Number of 'missing pupils' needed to fund required classes	KS1 Allocation spring term	
1	Ascot Heath Primary	161	6	11	164	6	0	2	£3,670	170	6	0	2	£2,940	170	6	0	2	£2,200	1
2	Binfield CE Primary	171	6	21	171	6	0	0	£0	173	6	0	0	£0	172	6	0	0	£0	2
3	Birch Hill Primary	159	6	9	156	6	0	4	£7,340	156	6	0	4	£5,870	154	6	0	4	£4,410	3
4	College Town Primary	206	7	26	208	7	0	0	£0	197	7	0	0	£0	193	7	0	0	£0	4
5	Cranbourne Primary	88	3	28	90	3	0	0	£0	78	3	0	0	£0	77	3	0	0	£0	5
6	Crown Wood Primary (1)	249	9	9	261	9	0	4	£7,340	249	9	0	4	£5,870	260	9	0	4	£4,410	6
7	Crowthorne CE Primary	89	3	29	90	3	0	0	£0	88	3	0	0	£0	90	3	0	0	£0	7
8	Fox Hill Primary	88	3	28	88	3	0	0	£0	82	3	0	0	£0	81	3	0	0	£0	8
9	Great Hollands Primary	87	3	27	87	3	0	0	£0	87	3	0	0	£0	86	3	0	0	£0	9
10	Harmans Water Primary	171	6	21	171	6	0	0	£0	169	6	0	0	£0	169	6	0	0	£0	10
11	Holly Spring Primary	243	9	3	254	9	0	10	£18,350	250	9	0	10	£14,680	256	9	0	10	£11,010	11
12	Jennetts Park CE Primary	148	5	28	155	6	1	0	£0	164	6	1	0	£0	168	6	1	0	£0	12
13	Meadow Vale Primary	236	8	26	238	8	0	0	£0	231	8	0	0	£0	232	8	0	0	£0	13
14	New Scotland Hill Primary	80	3	20	84	3	0	0	£0	86	3	0	0	£0	86	3	0	0	£0	14
15	Oakwood Primary	90	3	0	90	3	0	0	£0	90	3	0	0	£0	90	3	0	0	£0	15
16	Owlsmoor Primary	203	7	23	204	7	0	0	£0	197	7	0	0	£0	202	7	0	0	£0	16
17	Pines (The)	84	3	24	84	3	0	0	£0	90	3	0	0	£0	92	4	1	0	£0	17
18	Sandy Lane Primary	147	5	27	142	5	0	0	£0	131	5	0	0	£0	135	5	0	0	£0	18
19	St. Joseph's Catholic Primary	90	3	0	90	3	0	0	£0	90	3	0	0	£0	88	3	0	0	£0	19
20	St. Margaret Clitherow Catholic Pry	85	3	25	89	3	0	0	£0	81	3	0	0	£0	80	3	0	0	£0	20
21	St. Michael's E'stead CE Aided Pry	81	3	21	84	3	0	0	£0	83	3	0	0	£0	86	3	0	0	£0	21
22	St. Michael's CE Primary, Sandhurst	87	3	27	83	3	0	0	£0	79	3	0	0	£0	79	3	0	0	£0	22
23	Uplands Primary	90	3	0	90	3	0	0	£0	90	3	0	0	£0	90	3	0	0	£0	23
24	Warfield CE Primary	175	6	25	177	6	0	0	£0	179	6	0	0	£0	180	6	0	0	£0	24
25	Whitegrove Primary	180	6	0	179	6	0	0	£0	180	6	0	0	£0	180	6	0	0	£0	25
26	Wildmoor Heath	85	3	25	85	3	0	0	£0	79	3	0	0	£0	79	3	0	0	£0	26
27	Wildridings Primary School	154	6	4	156	6	0	9	£16,520	159	6	0	9	£13,220	155	6	0	9	£9,910	27
28	Winkfield St. Mary's CE Primary	82	3	22	80	3	0	0	£0	77	3	0	0	£0	79	3	0	0	£0	28
29	Wooden Hill Primary & Nursery(1)	165	6	15	166	6	0	0	£0	158	6	0	0	£0	154	6	0	0	£0	29
<b>TOTAL Primary</b>		<b>3,974</b>	<b>140</b>	<b>524</b>	<b>4,016</b>	<b>141</b>	<b>1</b>	<b>29</b>	<b>£53,220</b>	<b>3,943</b>	<b>141</b>	<b>1</b>	<b>29</b>	<b>£42,580</b>	<b>3,963</b>	<b>142</b>	<b>2</b>	<b>29</b>	<b>£31,940</b>	



## Criteria for in-year budget allocations to schools admitting a disproportionate number of SEND pupils numbers

Text proposed to be deleted is bold and ~~stuck through~~

New text is **bold and shaded yellow**

The DfE encourages LAs to allocate additional resources to schools that admit a disproportionate number of pupils with SEN with a clear expectation that this will affect only a minority of schools. The rationale of the contingency is that the normal operation of the simplified Funding Formula does not adequately resource schools for all costs when there is a large concentration of high needs pupils and inclusion of pupils into mainstream schools rather than specialist providers should be encouraged.

There is no prescribed methodology on how such a fund should **work but the distribution methodology should be simple and transparent, and devised so that additional funds are targeted only to a minority of schools which have particular challenges because of their disproportionate number of pupils with SEND or high needs, or their characteristics.** ~~and the scheme agreed by the Forum following consultation requires schools to meet both of the following criteria:~~ The criteria to be applied is as follows:

- 1. Where the proportion of pupils on roll receiving top up funding exceeds 4% of total pupil numbers (current average in BF is circa 3%)**
- 2. Where the number of qualifying schools is capped to no more than 15% in both primary (5 schools) and secondary (1 school). Where more than 15% of schools qualify under 1. above, schools to receive funding will be those with the highest proportion of pupils with an EHCP, up to the 15% limit.**
- 3. Where the total funds allocated will be capped to total approved budget for the year by scaling the amount of funding support to be paid for each pupil in receipt of an EHCP**
- ~~2. Where the proportion that top up funding paid to support High Needs pupils compared to the total budget allocated via the BF Funding Formula exceeds 2% in a primary school and 1% in a secondary school.~~

Data source and method of calculation to be as follows:

1. Statutory aged pupils only i.e. 5 to 16 year olds to be used in the calculation, including other LA pupils.
  2. Census point for pupil numbers to be the same as that used to calculate the main school budget statement, currently the October prior to the commencement of the relevant financial year
  3. The number of pupils on roll receiving top up funding and the total value to be as included in the original main school budget statement provided by the council, ordinarily the February or March prior to the commencement of the relevant financial year
  4. All pupils receiving top up funding counted as 1 FTE, irrespective of actual attendance.
  5. All per pupil top up funding to be based on a full year allocation, irrespective of actual **Pupils on roll at a Special Resource Provision are excluded from the calculation.**
- Data source relating to other LA pupils will need to reflect availability to BF, its accuracy and completeness and therefore may be different from above where appropriate.**

Approved by the Schools Forum on 22 June 2023.

The council is proposing the changes set out above be applied from April 2024.

## 2023-24 allocations from the SEN Specific Contingency plus illustrative 2024-25 allocations

School	Per pupil allocation										Allocation				Per pupil allocation	
	£1,100	£1,100									£1,100			£942	£683	
	2023-24		2024-25										Limit qualifying schools		Capping spend to budget	
	2023-24 Actual funding%	2023-24 allocation with 2024-25 policy	EHCP headcount February 2024 BFC & OLA	NOR Statutory Pupils Oct 23 Census	Top-up pupils % (1)	Total value of top-up for full year OLA + BFC (Pre-16 only)	2024-25 Gross Mainstream Budget before de-delegation	Top-up as % of school budget (2)	Qualify under both criteria?	2024-25 funding on proposed criteria	15% with highest % EHCPs	25% with highest % EHCPs	15% with highest % EHCPs	25% with highest % EHCPs		
Ascot Heath Primary School			4	395	1.01%	£38,179	£1,869,159	2.04%	No							
Binfield Primary School			9	412	2.18%	£90,885	£1,906,891	4.77%	No							
Birch Hill Primary School			8	389	2.06%	£122,429	£1,883,491	6.50%	No							
College Town Primary School			7	450	1.56%	£98,242	£2,134,510	4.60%	No							
Cranbourne Primary School			4	188	2.13%	£51,044	£958,765	5.32%	No							
Crown Wood Primary School			21	578	3.63%	£293,221	£2,671,950	10.97%	No							
Crowthorne Primary School			3	208	1.44%	£34,449	£1,019,097	3.38%	No							
Fox Hill Primary School		£8,800	7	195	3.59%	£93,732	£1,073,070	8.73%	No							
Great Hollands Primary School	£15,744	£19,800	17	253	6.72%	£179,197	£1,392,931	12.86%	Yes	£18,700	£18,700	£18,700	£18,700			
Harmans Water Primary School			8	412	1.94%	£83,995	£2,038,938	4.12%	No							
Holly Spring Primary School			20	592	3.38%	£197,664	£2,948,354	6.70%	No							
Jennett's Park CoFE Primary School	£17,222	£19,800	20	388	5.15%	£255,255	£1,851,997	13.78%	Yes	£22,000	£22,000	£22,000	£22,000			
Meadow Vale Primary School			13	574	2.26%	£108,757	£2,775,773	3.92%	No							
New Scotland Hill Primary School			3	198	1.52%	£18,410	£1,004,648	1.83%	No							
King's Academy Binfield - Primary			9	231	3.90%	£96,703	£994,559	9.72%	No							
King's Academy Oakwood			6	210	2.86%	£33,814	£1,055,668	3.20%	No							
Owlsmoor Primary School			10	504	1.98%	£71,861	£2,369,874	3.03%	No							
The Pines School			11	300	3.67%	£112,210	£1,554,443	7.22%	No							
Sandy Lane Primary School			4	403	0.99%	£41,613	£1,991,463	2.09%	No							
St Joseph's Primary School			10	211	4.74%	£120,144	£1,037,015	11.59%	Yes	£11,000	£11,000	£11,000	£11,000			
St Margaret Clitherow Primary School			3	199	1.51%	£32,403	£1,001,686	3.23%	No							
St Michael's Easthampstead Primary School			8	196	4.08%	£83,128	£982,565	8.46%	Yes	£8,800		£8,800				
St Michael's Primary School, Sandhurst		£9,900	8	195	4.10%	£65,211	£963,165	6.77%	Yes	£8,800	£8,800	£8,800	£8,800			
Uplands Primary School and Nursery			5	210	2.38%	£37,496	£1,004,545	3.73%	No							
Warfield Primary School			9	416	2.16%	£60,850	£2,069,422	2.94%	No							
Whitegrove Primary School			12	419	2.86%	£90,048	£1,980,391	4.55%	No							
Wildmoor Heath School			10	211	4.74%	£115,967	£1,033,938	11.22%	Yes	£11,000	£11,000	£11,000	£11,000			
Wildridings Primary School			9	395	2.28%	£131,976	£2,023,345	6.52%	No							
Winkfield St Mary's CoFE Primary School			6	198	3.03%	£56,966	£976,436	5.83%	No							
Wooden Hill Primary and Nursery School			10	373	2.68%	£104,435	£1,842,119	5.67%	No							
The Brakenhale School	£29,700	£30,800	36	1,044	3.45%	£326,742	£6,961,632	4.69%	Yes	£39,600						
King's Academy Easthampstead Park	£25,300	£27,500	30	896	3.35%	£216,239	£6,096,368	3.55%	Yes	£33,000						
Edgbarrow School		£42,900	46	1,111	4.14%	£457,785	£6,779,817	6.75%	Yes	£50,600	£50,600	£50,600	£50,600			
Garth Hill College			31	1,286	2.41%	£275,430	£9,208,550	2.99%	Yes	£34,100						
Ranelagh School			25	868	2.88%	£202,783	£5,367,568	3.78%	Yes	£27,500						
Sandhurst School		£25,300	32	1,030	3.11%	£279,004	£6,646,098	4.20%	Yes	£35,200						
King's Academy Binfield	£26,400	£26,400	34	950	3.58%	£299,868	£5,990,764	5.01%	Yes	£37,400			£23,220			
<b>Total Primary</b>	<b>£32,966</b>	<b>£58,300</b>	<b>274</b>	<b>9,903</b>	<b>2.77%</b>	<b>£2,920,284</b>	<b>£48,410,208</b>			<b>£80,300</b>	<b>£71,500</b>	<b>£80,300</b>	<b>£61,210</b>	<b>£49,850</b>		
<b>Total Secondary</b>	<b>£81,400</b>	<b>£152,900</b>	<b>234</b>	<b>7,185</b>	<b>3.26%</b>	<b>£2,054,851</b>	<b>£47,050,797</b>			<b>£257,400</b>	<b>£50,600</b>	<b>£88,000</b>	<b>£43,310</b>	<b>£54,640</b>		
<b>Total ALL</b>	<b>£114,366</b>	<b>£211,200</b>	<b>508</b>	<b>17,088</b>	<b>2.97%</b>	<b>£4,975,135</b>	<b>£95,461,005</b>			<b>£337,700</b>	<b>£122,100</b>	<b>£168,300</b>	<b>£104,520</b>	<b>£104,490</b>		
Total Primary	2	4								6	5	6	5	6		
Total Secondary	3	5								7	1	2	1	2		
Total number of qualifying schools	5	9								13	6	8	6	8		

## Criteria for the allocation of additional funds to support schools facing financial difficulties

Text proposed to be deleted is bold and ~~stuck through~~

New text is **bold and shaded yellow**

### Outline of the scheme

School Funding Regulations allow for additional funds outside the normal operation of the Funding Formula to be provided to schools considered to be in financial difficulty. In agreement with the Schools Forum, de-delegated funding has been set aside in the School's Budget for this purpose. The criteria to be used to allocate this funding has also previously been agreed, and a school would qualify for additional financial support if, in the opinion of the Council's Director responsible for schools and the Council's Director responsible for finance, they:

1. were unable to set a balanced budget and were in need of a licensed deficit arrangement at the start of the relevant financial year, and/or
2. were in or likely to fall into one of the Ofsted categories of causing concern, including serious weaknesses or special measures.
3. Were a 1 form of entry school judged good or better that have more than 5% empty places

Where additional funding is agreed, it is on condition that the senior managers and relevant governors of each school attend regular monitoring meetings with officers of the Council, provide such financial and other information that is requested, and do not make any significant deviations in spending, either in magnitude or by type without the approval of the Council's Director responsible for schools.

Before any proposed allocation of such funds is passed on to relevant schools, they are reported to and agreed by the Schools Forum. However, this can cause uncertainty and result in a delay in releasing resources to meet an immediate need.

### Powers delegated to the Director responsible for schools

In order to allow funds to be allocated within an appropriate time scale it is recommended that a set of principles be agreed by the School Forum which allows the Council's Director responsible for schools discretion to allocate funds up to but not exceeding a set level dependent on the Ofsted category of the school. Any such allocations would subsequently be reported to the Schools Forum.

The level of allocation of funds would be:

1. schools judged to have serious weaknesses (up to £20k per year)
2. schools deemed to be in need of special measures (up to £50k per year)
3. schools at risk of being **judged to require improvement**, have serious weaknesses or entering special measures (up to £30k per year)
4. 1 form of entry schools judged good or better that have more than 5% empty places (up to £20k per year per school and £40k in total)

With a maximum value of aggregate allocations of £150k in any one financial year without the express approval of the Schools Forum.

Allocations will only be agreed where the relevant school has demonstrated insufficient funds exist within the budget to fund the required actions or activities.

Arrangements to support and monitor schools also includes:

1. a Declaration of Concern (DoC) where a school is at risk of being judged as Requiring Improvement or inadequate at its next inspection.
2. where effective action is being taken this is then monitored through a Standards Monitoring Board (SMB) on a termly basis this a Rapid Response Board is established for the first 12 weeks.. Where required there is an independent chair.
3. the SMB reviews evidence provided by school leaders and LA staff after 12 weeks and a decision made as to whether leadership are taking effective action following the DoC.
4. an SMB is also established where schools enter an Ofsted category of concern (judged to have serious weaknesses or placed into Special Measures)
5. the processes are clearly shared within the Learning and Improvement Strategy / Annex A School Improvement

Where the school is unable to fund these actions from its own delegated budget the SMB can request that additional resources be sought. Any such requests are approved by the Council's Director responsible for schools. Funds would be allocated to the school from those held for schools in financial difficulty Where schools enter an Ofsted category of concern (judged to have serious weaknesses)

**Approved by the Schools Forum on 22 June 2023.**

**Clarification changes only proposed by the council.**

## 2023-24 funding allocations to schools in financial difficulties

### Allocations agreed under the Director's delegated powers

Arrangements to support and monitor schools includes a Declaration of Concern (DoC). A DoC is called where a school is at risk of being judged as Requiring Improvement or inadequate at its next inspection. Following this a Rapid Response Board is established for the first 12 weeks. Where effective action is being taken this is then monitored through a Standards Monitoring Board (SMB) on a termly basis. Where required there is an independent chair. The SMB reviews evidence provided by school leaders and LA staff after 12 weeks and a decision made as to whether leadership are taking effective action following the DoC. The processes are clearly shared within the Learning and Improvement Strategy / Annex A School Improvement.

Taking account of proposals from the SMB meetings at relevant schools and 1 FE primary schools with over 5% empty places, funding allocations totalling £0.52m were agreed during the year as follows:

1. £2,180 to St Michael's Easthampstead. External coaching for 7 leaders across the school, 4-5 coaching sessions, plus handwriting training.
2. £9,650 to Woodenhill Primary in respect of
  - CPD programme for staff needed to improve the quality of teaching.
  - Teaching and learning training to improve writing outcomes.
  - Coaching and leadership support to develop distributed leadership and improve the quality of education.
  - Essential support to build capacity and improve staff skills and expertise in the early years.
3. £3,810 to Winkfield St Marys as a 1 FE with low pupil numbers. There were 188 on roll at October 2023 which results in 10% of empty places.
4. £17,143 to St Michael's CE Aided Primary Schools (Sandhurst) as a 1 FE with low pupil numbers. There were 193 on roll at October 2023 which results in 8% of empty places
5. £19,047 to New Scotland Hill Primary School as a 1 FE with low pupil numbers. There were 189 on roll at October 2023 which results in 10% of empty places.

### LA expenditure

In addition to these school allocations, the Forum has also agreed that up to £60,000 of School Adviser and other professional staff support time, such as HR and Finance can be funded from this budget to support the SMBs and other additional arrangements provided directly by the council.

## **Eligible expenditure against the schools contingency**

### **Background**

**The School and Early Years Finance (England) Regulations** define “expenditure on the schools specific contingency” as:

“Central expenditure deducted for the purpose of ensuring that monies are available to enable an increase in a school’s budget share after it has been allocated, and where it subsequently becomes apparent that a governing body has incurred expenditure which it would be unreasonable to expect them to meet from the school’s budget share, which may include expenditure in relation to:

- schools in financial difficulty;
- the writing-off of deficits of schools which are discontinued, excluding any associated costs and overheads;
- new, amalgamating or closing schools;
- circumstances which were unforeseen when the school’s budget share was initially determined.”

In order to provide greater clarity, and to be able to fund all of the circumstances permitted by the DfE, which takes account of comments received from schools to the consultation on the school loan scheme, the following text is proposed to be approved.

### **Eligible expenditure from the BF schools’ contingency fund (de-delegated)**

- Unexpected and unavoidable costs in schools, which it would be unreasonable to expect governing bodies to meet from their delegated budget, and where the amount required and the circumstances giving rise to the additional costs were unknown at the time of setting the budget. These would ordinarily need to exceed £5,000.

Claims will be considered on a case by case basis by the Heads of Service covering Finance, Human Resources and Property before formal presentation to the Forum for a decision. Where relevant, this consideration will take account of whether any advice was sought from the council, the appropriateness of that advice and the actions then taken by schools and their impact.

- Correction of formula errors
- Where a school is closing and a deficit is likely, every effort should be taken to achieve break-even. Where a school is becoming an academy, they should also ensure costs are only incurred that relate to the school, and for the period it is a maintained school. However, where a school closes with a deficit, where the EFA does not reimburse for this, the cost must be picked up by the Dedicated School Grant (DSG).
- Funding for schools in financial difficulties where this is not the result of poor local management decisions. [Note a separate policy is in place for this category].

**Approved by the Schools Forum on 22 June 2023.**

**No changes proposed by the council.**