

Schools Forum
Wednesday, 19 October 2016 at 8.00 am
VENUE: Committee Room 1 - City Hall, Bradford

PLEASE NOTE

All meetings will be held in public; the agenda, decision list and minutes will be publicly available on the Council's website and Committee Secretariat, Room 112, City Hall, Bradford.

The taking of photographs, filming and sound recording of the meeting is allowed except if Councillors vote to exclude the public to discuss confidential matters covered by Schedule 12A of the Local Government Act 1972. Recording activity should be respectful to the conduct of the meeting and behaviour that disrupts the meeting (such as oral commentary) will not be permitted. Anyone attending the meeting who wishes to record or film the meeting's proceedings is advised to liaise with the Forum Clerk Asad Shah - 01274 432280 who will provide guidance and ensure that any necessary arrangements are in place. Those present who are invited to make spoken contributions should be aware that they may be filmed or sound recorded

1. APOLOGIES FOR ABSENCE

The City Solicitor will report apologies and the names of alternate Members who are attending the meeting in place of appointed Members.

2. DISCLOSURES OF INTEREST

To receive disclosures of interests from Members on matters to be considered at the meeting. The disclosure must include the nature of the interest.

An interest must also be disclosed in the meeting when it only becomes apparent to the member during the meeting.

3. MINUTES OF 21 SEPTEMBER 2016 AND MATTERS ARISING
(Minutes)

1 - 14

Recommended –

That the minutes of the meeting held on 21 September 2016 be signed as a correct record.



4. MATTERS RAISED BY SCHOOLS

Members will be asked to consider any issues raised by schools.

5. STANDING ITEM - DSG GROWTH FUND ALLOCATIONS (a)

There are no new allocations for consideration at this meeting.

(Sarah North – 01274 434173)

6. STANDING ITEM - BRADFORD EDUCATION IMPROVEMENT COMMISSIONING BOARD (BEICB) (i)

The minutes of the Bradford Education Improvement Commissioning Board (BEICB) meeting, held on 22 September 2016, will be approved by the BEICB on 24 November 2016 and will be presented for information and consideration at the December meeting.

(Andrew Redding – 01274 432678)

7. EDUCATION PERFORMANCE 2016 (i)

15 - 16

A report will be presented, Document GM which outlines the key education results from summer 2016.

Recommended –

The Schools Forum is asked to consider how the position presented should inform the Forum's financial decision making for 2017/18.

(Andrew Redding – 01274 432678)

8. THE LOCAL AUTHORITY'S FINANCIAL POSITION AND BUDGET PROPOSALS (i)

An outline of the key aspects of the Local Authority's financial position for 2017/18 will be presented.

Recommended –

The Forum is asked to consider the presentation and to give feedback.

(Andrew Redding – 01274 432678)



9. NATIONAL FUNDING FORMULA ANNOUNCEMENTS AND CONSULTATION (i)

The Business Advisor (Schools) will give an update verbally on any further announcements on National Funding Formula proposals. At the time of setting the agenda for this meeting the DfE's awaited response to the 1st stage of its consultation, and its 2nd stage consultation document, have not been published.

Recommended –

The Schools Forum is asked to consider and to note the information provided. As the 2nd stage consultation is expected (before the December Schools Forum meeting), Members are also asked consider how the Schools Forum's response is best pulled together and how the implications of the proposals are best analysed and communicated e.g. in an additional single item agenda Schools Forum meeting.

(Andrew Redding – 01274 432678)

10. CONSULTATION OUTCOMES - PRIMARY AND SECONDARY FORMULAE (a)

17 - 28

The Principal Finance Officer (Schools) will present a report, **Document GO**, which asks Members to consider the outcomes of the consultation, which was agreed at the last meeting. The Forum is asked to make final recommendations on the structure of the Primary and Secondary funding formulae, and the criteria for the allocation of Schools Block funds, for the 2017/18 financial year. Please note that an appendix to Document GO will be tabled at the meeting as it contains the outcome of a consultation period, which concludes on 14 October. This report also provides an update on further modelling related to the values of formula factors and the contribution from the Schools Block to High Needs Block pressures in 2017/18.

Recommended –

- (1) **The Forum is asked to consider the outcomes of the consultation. Members are then asked to consider whether the proposals should be changed in the light of responses.**
- (2) **Schools Members are asked to make final recommendations on the structure of the formulae in the indicative pro-forma (Appendix 1) a) Primary and b) Secondary. Appendix 1 has been completed on the basis of the proposals outlined in the consultation document and as agreed by the Forum in the last meeting held on 21 September.**



- (3) **Schools Members are asked to consider the responses and to make recommendations on the criteria for the allocation of Schools Block funds a) Primary and b) Secondary for the 2017/18 financial year.**

(Sarah North – 01274 434173)

11. CONSULTATION ON EARLY YEARS BLOCK FUNDING MATTERS 2017/18 (a) 29 - 60

The Business Advisor (Schools) will present a report, **Document GP**, which provides a further update on Early Years DSG funding matters and the consultation document to be published, which sets out proposals for Bradford's Early Years Single Funding Formula for the 2017/18 financial year.

Recommended –

The Schools Forum is asked to consider the matters raised in the report and agree for the consultation document to be published.

(Andrew Redding – 01274 432678)

12. CONSULTATION ON HIGH NEEDS BLOCK FUNDING MATTERS 2017/18 (a) 61 - 86

The Business Advisor (Schools) will present a report, **Document GQ**, which asks Members to agree the publication of the proposed consultation document on the High Needs Block funding model for 2017/18. This includes first sight of the estimated minimum number of places the Authority expects to commission and the arrangements for paying top up (Plus Element) funding.

Recommended –

The Forum is asked to agree to the publication of the proposed consultation on the High Needs Block funding model for 2017/18.

(Andrew Redding – 01274 432678)

13. DSG CENTRAL ITEMS AND DE-DELEGATED FUNDS 2017/18 (i) 87 - 94

The Business Advisor (Schools) will present a report, **Document GR**, which asks the Forum to consider the position of the funding of Schools and Early Years Block central items and de-delegated items from the DSG in 2017/18.



Recommended –

The Forum is asked to consider the position of the funding of central and de-delegated items, including what further consideration should be given / review work should take place, in advance of making final recommendations for 2017/17 at the January 2017 meeting.

(Andrew Redding – 01274 432678)

14. SCHOOLS FORUM STANDING ITEMS (i)

Updates on the following Forum standing items will be provided verbally where these have not been covered within other agenda items:

- Update on Single Status
- Update from the Schools Financial Performance Group (SFPG)
- Update from the Early Years Working Group (EYWG)
- Update from the Formula Funding Working Group (FFWG)
- Update on Primary School Places
- Update on Academies & Free Schools

(Andrew Redding – 01274 432678)

15. ANY OTHER BUSINESS / FUTURE AGENDA ITEMS

Members will be asked for any additional items of business, for consideration at a future meeting.

16. DATE OF NEXT MEETING

Please see the published schedule of meetings – the next Forum meeting is scheduled for Wednesday 7 December 2016.

17. EXCLUSION OF THE PUBLIC (a)

The Schools Forum will be asked to consider if the item relating to “Not For Publication Minutes of 18 May 2016 (Contract Settlement, Agenda Item *18)” should be considered in the absence of the public and, if so, to approve the following recommendation:



Recommended –

That the public be excluded from the meeting during the discussion of the following item (item *18) on the grounds that it is likely, in view of the nature of the business to be transacted or the nature of the proceedings, that if they were present exempt information within Paragraph 3 (Financial or Business Affairs) of Schedule 12A of the Local Government Act 1972 (as amended) would be disclosed and it is considered that, in all the circumstances, the public interest in allowing the public to remain is outweighed by the public interest in excluding public access to the relevant part of the proceedings for the following reason: “commercial confidentiality”.

(Andrew Redding – 01274 432678)

18. NOT FOR PUBLICATION MINUTES OF 18 MAY 2016 "CONTRACT SETTLEMENT" (*NFP minutes*)

Recommended –

That the NOT FOR PUBLICATION minutes of the meeting held on 18 May 2016 be signed as a correct record.

(a) Denotes an item for action

(i) Denotes an item for information



MINUTES OF THE MEETING OF THE SCHOOLS FORUM HELD ON WEDNESDAY 21 SEPTEMBER 2016 AT CITY HALL, BRADFORD

Commenced 0810, Adjourned 0810
Reconvened 1010, Concluded 1110

PRESENT

SCHOOL MEMBERS

Bev George, Chris Quinn, Dianne Rowbotham, Dominic Wall, Dwayne Saxton, Helen Williams, Ian Morrel, Kevin Holland, Leslie Heathcote, Michele Robinson, Nicky Kilvington, Ray Tate, Sue Haithwaite, Trevor Loft and Wahid Zaman.

NOMINATED SUB SCHOOL MEMBER

Anita Hall, Ian Murch, Irene Docherty and Alison Kaye

NON SCHOOL MEMBERS

Donna Willoughby

EXECUTIVE PORTFOLIO HOLDER – EDUCATION, EMPLOYMENT AND SKILLS

Councillor Imran Khan

LOCAL AUTHORITY (LA) OFFICERS

Andrew Redding	- Business Advisor (Schools)
Angela Spencer-Brooke	- Strategic Manager, SEND and Behaviour
Dawn Haigh	- Principal Finance Officer (Schools)
Jenny Cryer	- Assistant Director Performance, Commissioning and Partnerships
Judith Kirk	- Deputy Director, Education, Employment and Skills
Michael Jameson	- Strategic director, Children's Services
Sarah North	- Principal Finance Officer (Schools)

OBSERVER

Councillor Ward

APOLOGIES

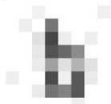
Members: Brent Fitzpatrick, Emma Ockerby, Nigel Cooper, Sir Nick Weller, Tahir Jamil.
Officers: Stuart Mckinnon-Evans, Director of Finance. Regular Observer: Lynn Murphy, Business Manager, Feversham College

DOMINIC WALL IN THE CHAIR

178. DISCLOSURES OF INTEREST

A declaration was received from the Chair for agenda item 12 "High Needs Block – Funding Additional SEND Provision", (minute 188). During the course of the meeting, Ian Morrell also made a declaration for this item.

ACTION: *City Solicitor*



179. MINUTES OF 20 JULY 2016 & MATTERS ARISING

The Business Advisor (Schools) reported on progress made on “Action” items as follows:

- **Social Impact Bond** – the application has been submitted and is progressing.
- **£1.2m DSG unallocated sum** – this had been referred to the Early Years Working Group (EYWG). Members will see from agenda item 11 that the EYWG has met. A final recommendation has not yet been made by this Group on this matter.
- **National Funding Formula Consultation** – an email was sent out to Members on 25 July following the Secretary of State’s announcement earlier that week. A formal update on this announcement is presented in agenda item 10. No further announcements on the Schools or High Needs Blocks have been made. Proposals for Early Years funding reform have been announced and these are to be considered in agenda item 11.
- **Academies Panel and referral of the letter from the Chair of Governors at Oastler School** – an email was sent on 9 September asking for representatives from Forum Members to sit on this panel. Responses have been received from 4 volunteers (Chris Quinn, Brent Fitzpatrick, Nicky Kilvington and Ian Morrell). Oastler School has been contacted to establish a date for a panel meeting, which is expected to take place before the October Schools Forum meeting. The Chair added that he has written to the headteacher of Oastler School regarding the coverage of this item by the Telegraph and Argus following the July meeting.
- **Update on Academy conversions and free schools** – there have been 5 conversions of maintained schools to academy status since the last Forum meeting, all on 1 September (3 secondary and 2 primary schools). It is not expected that any of these schools will hold deficit budgets. The Authority still expects a substantial number of conversions to take place before the end of this financial year. The DfE announced its newest wave of free schools at the end of last week. 3 free school projects have been approved for Bradford; 2 post 16 mainstream provisions (16-19) and 1 new secondary mainstream provision. The Chair added that a workshop has been arranged with the DfE on 22 September on free school provision for high needs and invited all interested in learning more about the development of free schools for high needs provision to attend this.
- **Post 16 Strategic review** – Members have received in their packs a copy of the post 16 provision review document, to ensure that all Members are aware especially of the ‘road map’ to improvement.

Resolved –

- (1) **That progress made on “Matters Arising” be noted.**
- (2) **That the minutes of the meeting held on 20 July 2016 be signed as a correct record.**

ACTION: *City Solicitor*

180. MATTERS RAISED BY SCHOOLS

A Member stated that he is aware that a number of schools have received invoices from the Authority for unbilled payroll costs. He asked that information be provided to the Schools Forum on this matter.

No resolution was passed on this item (please see resolution 13).

181. STANDING ITEM – DSG GROWTH FUND ALLOCATIONS

The Business Advisor (Schools) reported that there are no new allocations for consideration at this meeting but that the Forum is asked to consider, under agenda item 12, matters relating to the allocation of growth funding in the secondary sector.

No resolution was passed on this item.

182. STANDING ITEM – BRADFORD EDUCATION IMPROVEMENT COMMISSIONING BOARD

The Business Advisor (Schools) reported that the BEICB has not met since the last update provided to the Schools Forum at the July meeting.

No resolution was passed on this item.

183. SCHOOLS FORUM MEMBERS – ELECTION OF A CHAIR

The Business Advisor (Schools) asked Members to approve the proposed approach (by email) for the election of Chair of the Schools Forum for 2016/17. A Member asked whether the current Chair is willing to stand for re-election. The Chair confirmed that he is.

Resolved –

That the established approach be followed for the collection of nominations and the election of the Chair of the Schools Forum for 2016/17.

184. SCHOOLS FORUM ADMINISTRATION 2016/17 ACADEMIC YEAR

The Business Advisor (Schools) presented a report, **Document GF**, which asked Members to review the Forum's administrative and membership arrangements for the academic year 2016/17. He explained the basis and purpose of the proposed interim solution, which would be in place for September 2016 to April 2017; to secure effective Schools Forum membership over the critical DSG allocation period whilst also seeking to ensure that membership remains proportionate to the number of maintained schools and academies in the District. He explained that the Schools Forum Regulations were not establish to cope with the volume and speed of transition of maintained schools to academies that is expected in Bradford over the coming months.

Schools Forum Members were supportive of this proposal and did not ask any additional questions on this matter.

Resolved –

- (1) The Forum's Conduct of Meetings & Procedural Matters document be agreed.**
- (2) The interim Schools Forum membership arrangements for the period September 2016 to the end of March 2017, as set out in Document GF, also be agreed.**

Action: *Business Advisor (Schools)*

185. EARLY PROJECTION OF THE 2017/18 DSG POSITION AND COST PRESSURES

The Business Advisor (Schools) presented a report, **Document GG**, which provides an early indicative view of the 2017/18 Dedicated Schools Grant position and which also identifies the cost pressures, which the Forum will have to consider in making final recommendations in January 2017.

The Chair introduce this item by explaining that this is the starting point for the Forum's consideration of the key matters that will pervade its meetings over the coming months. The flow of agenda items is as follows:

- An overview of DSG indicative position for 2017/18 (Document GG item 9).
- Update on announcements made over the summer on the National Funding Formula for the Schools and High Needs Blocks (Document GH item 10).
- Presentation on the DfE's consultation on Early Years National Funding Formula (Document GI item 11).

By this point Forum Members will have an awareness of the scale of the funding challenge we face in 2017/18 and beyond, summarised as:

- Pressure in High Needs and needing to significantly increase the quantity of provision without sufficient additional funding from DfE in the short term (in 2017/18) and then without any certainty at this point about the longer term funding position



(whether the National Funding Formula will give us sufficient funding to expand and sustain our quantity of provision).

- The likely need to take a substantial contribution from the Primary & Secondary formula in 2017/18 to meet High Needs Block pressures. The impact that this may have on delegated budgets and pressures felt by schools and academies.
- Schools Block National Funding Formula probably will be in place at April 2018 but there is still a great deal of uncertainty. The ring-fencing restriction relating to the Schools Block will likely come in at April 2018, with an overall formula result that is probably not good for Bradford. This is suggested by the theme of the Early Years National Funding Formula proposals (an inadequate weighting towards deprivation).
- Reduction in Early Years funding, with very significant potential financial implications for Nursery Schools, at the same time as seeking to continue to raise quality and to deliver the Government's extended 30 hours entitlement.

The Business Advisor (Schools) confirmed that the critical action points for the Forum at this meeting are:

- Agreeing areas of consensus for our response to the DfE's consultation on Early Years Funding reform, which must be submitted tomorrow (Document GI Appendix 1).
- Agreeing the funding of the 1st tranche of 120 additional SEND places, from January 2017 (Document GJ item 12).
- Agreeing to the publication of our consultation on Bradford's 2017/18 primary & secondary school funding formulae and Schools Block centrally managed funds criteria (Document GK item 13).

In responding to the Business Advisor (Schools) presentation of the Document GG Appendix 1, Forum Members asked the following questions and made the following comments:

- That the DfE's proposals for the reform of Early Years funding, which includes a reduction of £3m in the funding available for the delivery of the 3 and 4 year old free entitlement and the introduction of a universal base rate, will have a devastating financial impact on the District's Nursery Schools.
- Clarification was sought on whether the outline suggestion for the Early Years Block to contribute £300,000 for the cost of the Early Years Inclusion Panel budget was based on the current level of contribution this Block makes to High Needs costs? The Business Advisor (Schools) confirmed that this is a correct understanding.
- Clarification was sought on the figure mentioned in the presentation of the document regarding the gap between the funding of mainstream EHCP's / Statements and the cost of provision (salaries of support staff). The Business Advisor (Schools) confirmed that an average gap of £2.65 per hour has been calculated and that this gap has come from, and been increased by, the increased cost of salaries resulting from national changes in employer costs when funding has remained cash flat. He stressed that this was an average calculation.
- A Primary Member reminded the Forum of the view that the primary phase is currently subsidising secondary and he also stated that the time taken for the assessment of children with additional SEND meant that the primary phase is being under funded for the costs of meeting the needs of children with SEND. A Secondary Member disagreed with the statement that the primary phase is subsidising secondary. Further information was asked to be provided on the



number of assessments / referrals for Education Health and Care Plans / SEN Statements by phase.

- That the situation, where expenditure pressures are increasing at the same time as income is reducing, has not been seen since the 1990s. What will happen to school carry forward balances? Members agreed that it would be useful for the Forum to see further information on the cumulative impact on delegated budgets of possible reductions in funding as well as increases in costs (such as salary costs for pay awards). The Business Advisor (Schools) explained that some schools are better placed than others to manage further substantial pressures in 2017/18. He also added that the ability of schools to manage will also be affected by the National Funding Formula going forward e.g. we have already warned that the current value of our lump sum funding is already at risk under national arrangements, which would have clear implications for the budgets of smaller schools

Resolved –

- (1) That the information in Document GG be noted.**
- (2) That information is provided to the next Schools Forum meeting on the number of assessments / referrals for Education Health and Care Plans / SEN Statements by phase.**
- (3) That further information is provided, which will enable Forum Members and schools to understand the cumulative impact on delegated budgets of possible reductions in funding as well as increases in costs (such as salary costs for pay awards).**

186. NATIONAL FUNDING FORMULA SCHOOLS AND HIGH NEEDS BLOCKS

The Business Advisor (Schools) presented a report, **Document GH**, which provided an overview of the latest information from Government, on the introduction of a National Funding Formula for the Schools and High Needs Blocks, in announcements made since the Forum meeting in July.

The Business Advisor (Schools) explained that, due to the delay in the publication of the 2nd stage of consultation by the DfE, there is still significant uncertainty about the timing and implications of a National Funding Formula. It is hoped that announcements will be made in time for the October meeting. He stated that, because of this uncertainty, and because we can only assume that the ring-fencing of the Schools Block restriction will come into place at April 2018 (thus preventing from this point further contributions to the High Needs Block), there is a line of inquiry on whether we should seek to take the maximum contribution we can from the Schools Block in 2017/18 in order to maximise resources for High Needs provisions, as this may be our final opportunity to do so. This was a line of discussion in the Formula Funding Working Group meeting. It was explained that the most that the Schools Block could contribute would be to the point that all primary and secondary schools are funded at their level protected by the DfE's Minimum Funding Guarantee, which is a reduction of 1.5% per pupil. This would go beyond the simple 1.5% reduction in all pupil-led factors, which is shown in the consultation document. The



Business Advisor (Schools) explained that the Forum was not being asked yet to make a decision on this, but that this would need to be further discussed.

The Business Advisor (Schools) explained, following the DfE's current proposals, that 2 out of the 3 DSG Blocks (the Early Years and the High Needs Blocks) would remain locally managed under National Funding Formula arrangements. He also reminded Members that we have previously speculated that the primary and secondary 'hard' National Funding Formula will not favour Bradford, because we speculate that the weighting given to additional educational needs / deprivation may reduce in favour of increasing the basic amount of funding for all authorities. He stated that the proposals for the Early Years Block, which appear to give an inadequate weighting to deprivation, are suggestive that this may be the case.

The Chair clarified for Members that what is shown in the consultation document (Document GK) was not the worst case scenario for primary and secondary schools and academies in 2017/18. Referring back to the earlier discussion on the DfE's proposals for Early Years Funding reform, and the potential significant financial implication for the District's Nursery Schools, he stated that Bradford has a larger number of Nursery Schools than the average of other authorities, with 70% of authorities having fewer than 7 and 30% not having any. The Chair also stated that the need for the Schools Block to contribute to the High Needs Block is not unique to Bradford. 75% of authorities have transferred Schools Block monies to their High Needs Blocks over the last 2 years. 27 authorities have made bigger transfers than we have, up to a 20% increase in High Needs Block spending. He stated that it feels like there is a lack of information coming from Government telling us this.

The Strategic Director, Children Services, emphasised this we do now have sight of the probably movement of funding away from deprivation and that this is not just happening within the DSG and schools budgets. It is critical that we make a substantial volume of noise about this.

Resolved –

That the information in Document GH be noted.

187. REPORT ON EARLY YEARS BLOCK FUNDING MATTERS & DFE CONSULTATION

The Business Advisor (Schools) presented a report, **Document GI**, which provided an update on Early Years DSG funding matters, including the DfE's consultation on the proposals for a National Funding Formula. The report asked for the Forum's view about areas of consensus that should be included in the Authority's response. It was explained that this report was presented in advance of asking the Forum to agree its consultation on Bradford's Early Years Single Funding Formula for the 2017/18 financial year, which it is anticipated would be presented to the 19 October meeting.

The Business Advisor (Schools) presented the key elements of our assessment of the impact of the DfE's proposals on the level of DSG funding into the Bradford District and on



individual types of providers. Many of these had already been presented within earlier agenda items. He emphasised that the proposed reduction in Bradford's Early Years Block rate of funding for the 3 and 4 year old free entitlement, £3m in total, will begin from April 2017 and be largely completed at April 2018 i.e. the impact of this reduction will be felt sooner rather than later. Our rate of DSG funding for the 3 and 4 year old offer will drop from £5.08 per hour to £4.57. In estimated terms, this will mean that the average delegated setting base rate of funding for providers would reduce from £4.41 now to £4.11 at April 2019. This reduction takes place alongside an additional reduction in the value of funding for deprivation and the assumed cessation of additional funding to support the additional cost structure of Nursery Schools. The combined result of the DfE's proposed reform will be the flattening of the distribution of Early Years DSG funding, nationally between authority areas and locally between different types of providers and between providers delivering the free entitlements to children from deprived and less deprived backgrounds.

The Business Advisor (Schools) explained that it was currently unclear whether some of the DfE's proposals for formula change are to be implemented from April 2017 or by April 2019. However, he emphasised that rates of funding for providers will decrease at April 2017. The Early Years Working Group is meeting again to consider proposals for Bradford's Early Years Single Funding Formula for the 2017/18 financial year and to make a recommendation on the £1.2m one off monies. One of the key considerations for the EYWG will be our timetable for implementing change in Bradford in response to the DfE's reforms.

In summarising the Authority's proposed response to the DfE's consultation (shown in Appendix 1), the Business Advisor (Schools) explained that the EYWG has recommended that a clearer statement be added about the impact that funding reduction will have on our ability to sustain the improvements that have been made in the quality of early years provision and workforce.

Members agreed that they are satisfied with the proposed response. A Member asked for the composition of the EYWG and this was provided. Another Member stated that, as Nursery Schools are currently unable to convert to academy status, the option to develop MAT solutions to support future sustainability is not currently available. The Representative of Maintained Nursery Schools stated that the DfE's National Funding Formula proposals for Early Years are contradictory, on one hand stating that Nursery School have different and additional cost bases but, on the other, proposing a set of changes that ignore this.

Resolved –

- 1) That the information in Document GH be noted.**
- 2) The Schools Forum agrees with the Authority's proposed response to the DfE's consultation (shown at Appendix 1) and for this response to be submitted.**

Action: Business Advisor (Schools)



188. HIGH NEEDS BLOCK – FUNDING ADDITIONAL SEND PROVISION

Referring to the reports presented under agenda items 9, 10 and 11, as well as the additional **Document GJ**, the Business Advisor (Schools) explained the planned creation of additional SEND places (an additional 120 places in each of the next 3 academic years), how these were to be funded from the High Needs Block and the wider implications on the DSG.

He explained that it is understood that the Schools Forum will wish to fully consider all implications of what has been presented and would wish to make final recommendations on the allocation of the 2017/18 DSG in the round in January 2017. Members are asked to give their outline agreement now however, for the first set of 120 places to be funded from the High Needs Block, to enable these places to be established for January 2017, at an estimated cost of £0.63m for the period January to March 2017 and then £2.52m for a full year (using an estimated cost of £21,000 per place). He explained that these places would be established in interim satellite provisions managed by special schools.

The Strategic Manager, SEND and Behaviour, emphasised the very pressing need to establish the 1st tranche of 120 places. She also made reference to work taking place to deliver efficiencies within the High Needs Block, which would support the identification of more resource to fund an increased quantity of places. The Chair welcomed this reference to value for money and the work that has been done to enable this firm intention to establish additional places to be presented to the meeting today. The Chair also stated that it was important that we do not lose sight of the need for places in both SEND and behaviour provisions and that the work that is taking place around SEND also be completed for behaviour. The Deputy Director, Education, Employment and Skills, stated that it is expected that review work on behaviour will move quickly.

The Vice Chair suggested that it would be helpful if the Forum knew a bit more about the plans for the establishment of the 120 places. The Strategic Manager explained that much of this was still under negotiation, but that 5 different settings have been identified. Diligent work has been carried out by the Authority to ensure that these places will be established in the correct locations and under secure satellite management arrangements. She added that there has been no shortage of willingness from special schools to co-operate and participate in this work. The Deputy Director added that the schools have been fantastic over this issue.

In the discussion that followed Members asked the following questions and made the following comments:

- Information was presented to the recent DAP meeting stating that the number of referrals for EHCPs had increased in the District by 97% over the last 2 years.
- How will the 120 places be filled; where will the pupils come from; are these currently in mainstream settings? The Chair responded to say that SEN had presented to the DAP the position that 86 children are currently in mainstream provisions with EHCPs identifying the need for special school place, but it was not necessarily the case that all the 120 will come from mainstream. The Chair also offered his analysis of what has happened / is happening across the country regarding special school places; that there has been an historic reduction in the number of special school places (>1,000 places fewer), the numbers have stabilised



over the last 5 years, but now there has been a growth in need, which is driving applications for new special free schools. Bradford needs to move in the direction of developing specialisms within our special school provisions (new free schools) so that our generic special schools can support children currently placed in mainstream settings.

- The budgets of mainstream schools are currently on a knife-edge and there is danger that more funding is removed from mainstream budgets more quickly than pupil transition to specialist places, giving schools a 'double-problem'. The Chair responded to say that there will be a movement of both funding and children out of mainstream following the principle that funding follows the child. However, in terms of the movement of money between the DSG Blocks, we potentially have a final window of opportunity in 2017/18, before National Funding Formula, to move money into the High Needs Block up front to begin to address our sufficiency of provision issues. Any increase in our High Needs Block under NFF is not certain and could possibly be 4 or 5 years away.
- Work needs to take place to address the sufficiency of ESD places; the pressure is not just in SEND. This pressure needs to be included in discussions about the development of new free school provision.
- The transparency of the application of the funding Ranges Model needs to be looked at, where the level of funding of a pupil jumps when placed in a special school from a mainstream setting.
- What is the 120 / 360 places as a % of current numbers? The Business Advisor confirmed that we have currently approximately 2,000 places funded from the High Needs Block, of which 1,000 are in special schools.
- A Member expressed concern that the growth in special school places will lead to a less inclusive model. The Chair respond to say that mainstream has become a very challenging environment and that the growth in special school places is a national priority and phenomenon. Government has not provided any strong policy statement on this. A Member added that data shows that Bradford is not becoming less inclusive; it is the level of need that is growing so that the needs of an increasing number of pupils cannot be met appropriately in a mainstream environment. Mainstream is not becoming a less inclusive environment.
- In considering decisions about funding (and moving further amounts from the Schools Block to the High Needs Block) we must also be mindful of the impact reduced mainstream budgets will have on the life chances of mainstream pupils.
- The Vice Chair reminded Members that the position of the sufficiency of high needs places was presented to the Education Improvement Strategy Board earlier this year. The Strategic Director, Children's Services, stated that this presentation has helped the Authority's political leadership to understand the situation and how we respond.

A Member asked for clarity on the % reduction that would be needed from the Schools Block (primary and secondary school funding formulae) to fund the 120 places and asked whether this decision was committing the Forum to the 1.5% reduction that is shown in the primary and secondary consultation document in 2017/18. The Business Advisor (Schools) stated that the 1.5% reduction is also seeking to finance the 2nd tranche of places from September 2017, as well as other cost pressures within the High Needs Block. As such, the % reduction that is needed specifically to fund the 1st tranche of 120 places is lower than this. We would also be looking to use reserve / one off monies to finance the



proportion of cost relating to the period January to March 2017. However, in taking the decision the Forum would be accepting a level of contribution from the Schools Block to the High Needs Block in 2017/18. The Business Advisor initially estimated that a reduction of 0.95% would be needed to fund the 1st tranche of places in 2017/18, but he revised this down to an estimated 0.69%, stressing that this is a very rough calculation.

The Chair suggested that a final decision on the funding of the 120 places be postponed until after item 13 on the agenda has been presented. Please see the notes of the discussion recorded under the next item.

Resolved –

The Schools Forum agrees for the first tranche of additional SEND places to be funded from the High Needs Block from January 2017 and on an on-going basis as set out in Document GI.

Action: Business Advisor (Schools)

189. CONSULTATION ON THE PRIMARY AND SECONDARY SCHOOL FORMULAE 2017/18

The Principal Finance Officer (schools) presented a report, **Document GK**, which asked the Forum to consider the consultation document, which outlines the proposals for the formulae to be used to calculate budgets for Primary and Secondary schools (and academies) for the 2017/18 financial year and the criteria that will form the basis of the allocation of additional funding to schools (and academies where appropriate) from DSG centrally managed funds.

The Principal Finance Officer summarised the proposals included in the document Appendix 1, stressing that no structural changes to the primary and secondary formula are proposed other than the changes in data use required by the DfE. She explained the amendment to the IDACI bands and that the weighting within the secondary low attainment factor would be adjusted by the DfE in the dataset we will receive in December.

The Principal Finance Officer stressed that a key purpose of the consultation document, and the modelling attached with this, is to give schools and academies early warning of a reduction in formula funding in 2017/18 that is likely to come from the Forum's discussions on how to meet the growth in High Needs Block cost. She stated that these key messages had been presented to primary business managers last week and will be presented to secondary business managers.

The Principal Finance Office also drew Member's attention to the proposal for the clarification of the criteria to be used to calculate and allocate in year growth funding to secondary schools and academies, as growth in this sector is not quite as straightforward as has been in the phase.

In the discussion that followed Members asked the following questions and made the following comments:



- Is the 1.5% shown in the document a reduction on some or all formula factors? It was clarified that this was a reduction only in the pupil-led factors. It was agreed that this will be stated more explicitly in the consultation document.
- Is the assumption, with the cost assessment built into the proposed criteria, that growth funding will not usually be allocated to the secondary phase? The Principal Finance Officer clarified that this won't be the assumption. We would actually assume that growth funding would be allocated, but we feel that it is reasonable, given that how a secondary school can adjust to handle changes in pupil numbers is more complicated than in a primary school, that an assessment is carried out to ensure that an additional allocation from the DSG represents value for money.
- Will secondary growth funding be limited to growth in year 7, not for growth in other year groups during the year? It was confirmed that growth funding would only be applied for year 7 growth within the normal admissions round, where this growth comes from the request by the Local Authority for the school to increase its PAN to meet basic need sufficiency. It would not fund pupils admitted on appeal.
- What will the cost assessment look like within the secondary growth fund criteria? The Business Advisor (Schools) stated that this would be a budget conversation with the school. A Member emphasised that this conversation would need to take place at the point the Authority consults with the school about increasing its PAN. The Business Advisor (Schools) agreed that this would be the case.
- What are the positions of school carry forward balances? How challenging will it be for a reduction of 1.5% to be managed by individual schools? The Business Advisor stated that the picture of carry forward balances becomes clearer from quarter 2 budget monitoring returns in October. Some schools will be better placed than others to manage this reduction. He also emphasised that the figure of 1.5% has been used in the consultation document as this is a way of getting a clear message out to schools as simply as possible. He referred to discussion earlier in the meeting regarding the possibility of taking a contribution at a value greater than 1.5% and also that, on current numbers, 1.5% will not be sufficient to balance the DSG allocation in 2017/18 (Document GG shows that there is still a £1.2m budget gap). The Principal Finance Officer explained that we are also providing schools with a view of their worst case scenario in 2017/18 (the point at which the school is funded on the DfE's Minimum Funding Guarantee). The HCSS Budget Software will also enable schools to model the combined impact of income reductions and expenditure increases.
- This cumulative impact of income reductions, including reductions in early years and post 16, and expenditure increases, needs to be analysed.
- A Member commented that a reduction of 1.5% is probably just the 'tip of the iceberg' where we look at the costs that have already been absorbed by schools over the last 2 years and as we look forward to the implications of National Funding Formula and the further growth of costs in schools.

Resolved –

That the consultation document, as set out in Document GK, but incorporating the amendments agreed by Members that are recorded in the minutes of the meeting, be published.

Action: *Principal Finance Officer (Schools)*



190. WORK PROGRAMME AND SCHEDULE OF MEETINGS 2016/17 ACADEMIC YEAR

The Business Advisor (Schools) presented a report, **Document GL**, which outlined the School Forum's 2016/17 Academic Year work programme.

Resolved –

That the work programme be noted.

Action: Business Advisor (Schools)

191. SCHOOLS FORUM STANDING ITEMS

No further updates were presented on the Forum's standing items.

No resolution was passed on this item.

192. AOB / FUTURE AGENDA ITEMS

Resolved –

That information be provided to the Schools Forum on the charging of payroll costs in response to the matter raised by a Forum Member at the start of the meeting.

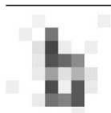
193. DATE OF NEXT MEETING

The next meeting of the Schools Forum is Wednesday 19 October 2016.

Note: These minutes are subject to approval as a correct record at the next meeting of the Schools Forum.

committeesecretariat\minutes\SF21Sep

THESE MINUTES HAVE BEEN PRODUCED, WHEREVER POSSIBLE, ON RECYCLED PAPER



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SCHOOLS FORUM AGENDA ITEM

For Action

For Information



Brief Description of Item (including the purpose / reason for presenting this for consideration by the Forum)

This paper provides the Schools Forum with an overview of the results achieved by Bradford's pupils in the tests and examinations that they completed during the summer term 2016.

Date (s) of any Previous Discussion at the Forum

Summer 2015 results were presented to the Forum in October 2015.

Background / Context

- There is national testing for pupils in the following age groups annually during the summer term
 - At the end of the Early Years Foundation Stage – 5 year olds
 - At the end of Year 1 – Phonics Screening Check – 6 year olds
 - At the end of Key Stage 1 – 7 year olds
 - At the end of Key Stage 2 – 11 year olds
 - At the end of Key Stage 4 – 16 year olds
 - At the end of Key Stage 5 – 18 year olds

- The results are received from the Department for Education (DfE) from July through to January of the following year. Initially provisional results are provided which are checked by schools. The checking involves the possible remarks of test papers and the discounting of pupils that are new to the country.

- Final validated results are received as follows:
 - October – Key Stage 1, Phonics, Early Years Foundation Stage
 - December – Key Stage 2
 - January – Key Stage 4 and Key Stage 5

- This report provides an overview of Bradford's performance in each of the national tests and examinations. A detailed analysis of the data has already been undertaken and is being used by LA officers and the school partnerships to address areas of underperformance and to share good practice.

Details of the Item for Consideration

- Outcomes in Early years have sustained a rising trend over three years. In 2016, the percentage of pupils achieving a good level of development (GLD) has risen by 4% points in Bradford to 66% securing an 11% increase over the last three years. Provisionally, the national average improved by 3% points in 2016 to 69%.

- There is a rising trend in the percentage of Year 1 pupils achieving the required standard in Phonics, with a 5% point increase in Bradford's figures in 2015 and an 8% increase since 2014, more than the national improvement of 7% over the three years.

- In 2016, based on provisional data Bradford's Key Stage 1 (KS1) pupils have performed slightly below national in reading, writing and mathematics on the new expected standard performance measures: 70% in reading (74% nationally), 64% in writing (66%) and 70 in mathematics (73%) . Results are not comparable with those in previous years.
- At the end of Key Stage 2 in 2016, 46% of pupils met the new expected standard in reading, writing and mathematics combined, compared with 53% nationally. This result places Bradford 134th out of 150 local authorities. Results are not comparable with those in previous years.
- Progress from S1 to KS2 is now assessed using a Value Added progress score, which can be positive (above average), zero (average) or negative (below average) VA score. The VA score for Bradford's pupils was positive for writing (+0.9) and mathematics (+0.2), meaning the outcomes were better than average, and negative for reading (-0.8), meaning below average.
- Based on the provisional data, the indications are that the number of schools below floor standards will reduce to seven, or 5% of schools, from 15 (10%) in 2015. This demonstrates a significant improvement in 2016.
- On the new performance measures at the end of Key Stage 4, the Attainment 8 score, i.e. average grade achieved by Bradford pupils was 4.5 and the Progress 8 score was positive, at +0.05. Bradford's percentage of students achieving 5 A*-C GCSEs including English and maths was 48.0%. This represents an improvement of 2.5 percentage points on Bradford's 2015 validated result of 45.5%.
- The average grade per academic entry for Bradford is C- in 2016; although A Level reporting uses a new scoring system in 2016, e.g. A* = 60 points, A = 50, etc., Bradford students also attained a grade C- on average in 2015. These very provisional data suggest that grades per entry for the two vocational cohorts indicate a good spread of results. However, there are concerns that Bradford's results are not improving over time.

Implications for the Dedicated Schools Grant (DSG) (if any)

It is important that financial resources are targeted on the schools and pupils where the greatest levels of improvement are required.

How does this item support the achievement of the District's Education Priorities

This paper provides information on the priority outcome focus 'Good Schools and a Great Start for All Our Children':

- Ensuring that children are school ready
- Accelerating educational attainment and achievement
- Ensuring young people are life and work ready

Recommendations

The Schools Forum is asked to consider how the position presented should inform the Forum's financial decision making for 2017/18.

List of Supporting Appendices / Papers (where applicable)

None

Contact Officer

Judith Kirk
Deputy Director Education, Employment and Skills
Tel: 01274 431078
Judith.kirk@bradford.gov.uk

SCHOOLS FORUM AGENDA ITEM

For Action



For Information



Brief Description of Item (including the purpose / reason for presenting this for consideration by the Forum)

This report asks Members to consider the outcomes of the consultation on the 2017/18 Primary and Secondary funding formulae. Schools Members of the relevant phases are then asked to make final recommendations on the structure of the formulae, and the criteria for the allocation of Schools Block funds, for the 2017/18 financial year. This report also provides an update on further illustrative modelling related to the values of formula factors, as discussed at the last meeting.

Date (s) of any Previous Discussion at the Forum

The consultation document and appendices were discussed and approved at the last Forum meeting held on 21 September 2016.

Background / Context

In March 2012, the Government announced significant changes to the education funding system. These changes were implemented by all local authorities at 1 April 2013 and included simplified formula arrangements for the calculation of delegated budgets and significant new restrictions on the central management of funds within the Dedicated Schools Grant (DSG).

On 4 June 2013, the Government published a document entitled “2014-15 Revenue Funding Arrangements: Operational Information for local authorities”, which set out further changes to funding arrangements for the 2014/15 financial year, which were designed to continue progress towards a national fair funding formula.

On 17 July 2014, the Government confirmed that authorities and Schools Forums would continue to be required to set local formula funding arrangements for the 2015/16 financial year. The [2015-16 Operational Guide](#) confirmed that the arrangements in place for 2014/15 would continue for 2015/16, but with a small number of changes, which included the requirement for the Authority to calculate funding for all academies (including former non-recoupment academies) and free schools through our local formulae, including funding for in year growth. The Government also confirmed that £390 million would be allocated to the least fairly funded authorities in England to ensure that every local authority attracts a minimum funding level for the pupils and schools in its area; as our funding was already above the minimum funding levels, this did not affect Bradford’s DSG.

On 16 July 2015, the Schools Block per pupil funding rates for each local authority for 2016/17 were confirmed to be the same as in 2015/16, including the additional money allocated to the least fairly funded authorities as a result of minimum funding levels. The [“School revenue funding 2016 to 2017: Operational guide”](#) confirmed that the regulations in place for 2015/16 would be unchanged for 2016/17. We therefore. made no changes to our primary and secondary formula funding structures for 2016/17.

On 7 March 2016, the Government published the first stage of a two part consultation, which concentrated on the principles and building blocks of the National Funding Formula (NFF). The initial proposal was for the school-level NFF for Primary and Secondary schools and academies to be implemented from April 2019, but for transition to this, as well as changes to move to a formularised High Needs Block, to begin from April 2017. The full consultation and accompanying documents can be viewed on the DfE’s [“Schools national funding formula”](#) webpage.

On 21 July 2016, the Education Secretary made a statement, which confirmed that the Government is still committed to the introduction of the National Funding Formula (NFF), but that the start of the implementation of this would be postponed. The Government’s response to the first stage of consultation is expected to be published shortly along with a second stage consultation. We still expect that this second stage will provide more detailed information to enable modelling of the impact of the NFF on individual schools and academies, as well as on the Local Authority. We now expect the transition to a NFF to begin for mainstream primary and secondary funding, and high needs, from April 2018.

The [“Schools revenue funding 2017 to 2018: operational guide”](#) was also published on 21 July 2016, and confirmed that the school funding arrangements for 2017/18 are broadly similar to those of 2016/17, with no required changes to formula structures. The guide does, however, confirm some national directed changes to the data to be used to calculate funding allocations under the secondary low attainment and the deprivation IDACI factors.

Details of the Item for Consideration (continued)

At the last Forum meeting, members discussed and approved the consultation document which outlines the proposals for the formulae to be used to calculate budgets for Primary and Secondary schools and academies in 2017/18.

The main consultation document (incorporating the amendments agreed by Members that are recorded in the minutes of the last meeting), and accompanying appendices were subsequently published on Bradford Schools Online (BSO) [here](#) on 21 September 2016. The key messages have been presented to Primary School Business Managers and will be presented shortly to Secondary School Business Managers. Notification of the publication of the consultation document was emailed to both primary and secondary School Business Managers. Representative Head teachers of the Schools Forum presented the key messages from the September Schools Forum meeting to the BPIP Conference.

Stakeholders have been invited to respond to the consultation by providing comments on the proposals and answering the specific questions within the paper by Friday 14 October 2016; this means that the analysis of responses will not be available prior to the Forum meeting, but will be tabled for discussion at the meeting.

Although the consultation was primarily concerned with setting the formulae structures for 2017/18, it gave early warning of the implications of a further contribution from the primary and secondary school formulae to resource an increased number of places for children and young people with high needs. It also gave schools and academies some guidance on what they should be doing with this information. Schools will be aware that a reduction of 0.42% was applied to all pupil-led factors in the primary and secondary formulae in this current financial year. As discussed at the last meeting, indicative DSG modelling suggests that a greater % reduction will be needed in order to balance the DSG in 2017/18. The financial modelling in Appendix 1 to the consultation showed the estimated impact (using an estimate of October 2016 Census numbers on roll), on 2017/18 school and academy budgets, of an indicative 1.5% reduction in the values of all pupil-led formulae variables. The indicative pro-forma (shown in Appendix 1) is also currently based on reducing pupil-led factor values by 1.5%, but it is possible that further reductions in formula variables may be needed to balance the overall DSG allocation. Reductions to individual schools block allocations are limited by the Minimum Funding Guarantee (MFG), which is set at -1.5% for 2017/18; this means that the worst case scenario for any school or academy will be where the Schools Block (Reception – Year 11) funding per pupil reduces by 1.5% on the 2016/17 funding per pupil. A worst case scenario funding ready reckoner has been made available on BSO, and allows primary and secondary schools and academies to input their own estimate of October 2016 Census numbers on roll, to more accurately assess the possible impact of formula reductions for their school in 2017/18.

At the last meeting it was agreed that the cumulative impact of income reductions, including reductions in early years and post-16, and expenditure increases, would need to be analysed. Using indicative income reductions likely to be needed in 2017/18, alongside the latest available benchmarking information, and making simple assumptions about expenditure (1% increase on pay awards, 1% increase for incremental drift, 3% increase on prices), we can estimate the average cumulative cost pressure on school budgets to be around 4% in 2017/18.

At this stage, we do not have sufficient information to include post-16 funding, but the modelling shown in Appendices 2a and 2b shows the total cash and per pupil funding impact for individual schools and academies, using the estimated worst case position for the Schools Block (Reception – Year 11), and the current indicative Early Years Block allocations for funding the free entitlement for three and four year olds. This is shown for illustrative purposes to inform the Forum's discussions on 2017/18 DSG arrangements. These positions will be updated in the December meeting using early October 2016 Census pupil numbers, and then again in the January meeting once final data is available.

The Formula Funding Working Group (FFWG) plans to reconvene following the publication of the National Funding Formula 2nd stage consultation to explore further the implications of NFF proposals, and to model the impact on individual schools and academies.

The final pro-forma detailing our formulae structures and factor values must be submitted to the EFA by 20 January 2017; further discussion on the factor values will continue this term, and final recommendations will be made in the January 2017 Schools Forum meeting.

Schools Members of the relevant phases are asked to make final decisions on the structure of the formulae in the indicative pro-forma (Appendix 1) for a) Primary and b) Secondary. Appendix 1 has been completed on the basis of the proposals outlined in the consultation document and as agreed by the Forum in the last meeting held on 21 September.

Details of the Item for Consideration (continued)

Contingency Criteria

The Schools Forum made final decisions on the 2016/17 contingency funds to be held within the Schools Block of the DSG in the meeting held in January 2016. The proposed criteria for 2017/18 contingency funds are broadly the same as in 2016/17, with the exception of the growth fund for secondary schools and academies, where we propose a set of clearer criteria for the allocation of additional in year funding, as set out below:

The following Schools Block funds and criteria were proposed in section 5 of the consultation document:

- School Re-Organisation Costs - as for 2016/17
- Exceptional Costs and Schools in Financial Difficulty - as for 2016/17
- The Growth Fund - as for 2016/17, but with additional criteria proposed for Secondary growth, as follows:
 - The school or academy must have admitted additional pupils (either via a permanent expansion or a one off bulge class) at the request of the Local Authority to meet basic-need sufficiency and only numbers associated with basic need sufficiency will be eligible for funding.
 - The request for additional places from the Authority has come within the normal admissions round and relates to the school's year 7 intake.
 - Funding in the first year is calculated on actual numbers and allocated only once actual October Census numbers are confirmed.
 - Funding is allocated only after an assessment of the actual cost implications of the additional pupils on the school's budget for the lifetime of the process of expansion. This assessment would be carried out at the time of the initial discussion / consultation between the Local Authority and the school or academy, and would take the form of a budget discussion with the Head teacher and Business Manager.

The consultation document asks for a view whether, for 2017/18, sums should continue to be held in contingency for the above items, and whether the criteria included in section 5 should be used to allocate funding. Any responses from stakeholders will be included in Appendix 3 which will be tabled at the meeting.

Schools Members of the relevant phases are asked to consider the responses and make a recommendation on the continuation of the above existing funds for a) Primary and b) Secondary in 2017/18. The values of funding held for contingency items will be set in the January meeting.

De-Delegated Funds

The Schools Forum made decisions relating to de-delegated funding for the current financial year in the meeting held in January 2016.

The consultation document asked maintained schools for their views directly on whether, for 2017/18, sums should continue to be de-delegated from maintained school budgets for the purposes outlined. Responses from stakeholders on the future position of de-delegated funds will be included in the presentation of Document GO.

Implications for the Dedicated Schools Grant (DSG) (if any)

Recommendations will have direct implications for the distribution of the Schools Block of the DSG in 2017/18. Final implications will not be known until factor values are confirmed in the Schools Forum meeting to be held in January 2017.

How does this item support the achievement of the District's Education Priorities

The District's key strategic aims are to:

- Secure high quality leadership and governance in all schools
- Improve the school readiness of children and early years outcomes
- Improving teaching and learning (including raising the levels of literacy across all phases)
- Raise the attainment of vulnerable groups and narrow the attainment gap.

The fair funding of schools and academies across the Bradford District is vital to enable individual schools / academies to achieve their key educational priorities, and to best support the pupils attending Bradford schools and academies. Continuing to use the deprivation, attainment, English as an additional language and mobility factors allows our funding formulae to recognise the varying needs of pupils and schools / academies across the District, and supports one of our key aims which is to narrow the gap.

Overall continuity in our funding model for primary and secondary schools and academies in 2017/18 will provide a stable platform for schools / academies to continue to meet their educational priorities.

Recommendations

Prior to taking final decisions, the Forum is asked to consider the outcomes of the consultation. Members are then asked to consider whether the proposals should be changed in light of the responses. These responses will be tabled at the meeting, following the conclusion of the consultation period on Friday 14 October.

- 1) Schools Members are asked to make final recommendations on the structure of the formulae in the indicative pro-forma (Appendix 1) for 2017/18 for a) Primary and b) Secondary.** Appendix 1 has been completed on the basis of the proposals outlined in the consultation document and as agreed by the Forum in the last meeting held on 21 September.
- 2) Schools Members are asked to consider the responses and to make recommendations on the criteria for the allocation of Schools Block funds for a) Primary and b) Secondary for the 2017/18 financial year.**

List of Supporting Appendices / Papers (where applicable)

- Appendix 1 - Indicative Primary and Secondary Pro-forma for 2017/18
- Appendix 2a - 2017/18 Illustrative Worst Case Scenario Modelling - Primary
- Appendix 2b - 2017/18 Illustrative Worst Case Scenario Modelling - Secondary
- Appendix 3 - Analysis of Consultation Responses (*this will be tabled at the meeting*)

Contact Officer (name, telephone number and email address)

Sarah North, Principal Finance Officer
01274 434173
sarah.north@bradford.gov.uk

Local Authority Funding Reform Proforma 2017/18 (DRAFT)

LA Name:	Bradford
LA Number:	380

Pupil Led Factors

1) Basic Entitlement Age Weighted Pupil Unit (AWPU)	Reception uplift	Yes	Pupil Units			104.00						
	Description	Amount per pupil		Pupil Units		Sub Total	Total	Proportion of total pre MFG funding (%)	Notional SEN (%)			
	Primary (Years R-6)	£2,839.74		55,285.00		£156,995,076	£285,086,217	38.77%	7.51%			
	Key Stage 3 (Years 7-9)	£4,081.74		19,041.83		£77,723,834		19.20%	6.28%			
	Key Stage 4 (Years 10-11)	£4,197.98		11,998.00		£50,367,307		12.44%	6.28%			
		Description	Primary amount per pupil	Secondary amount per pupil	Eligible proportion of primary NOR	Eligible proportion of secondary NOR	Sub Total	Total	Proportion of total pre MFG funding (%)	Primary Notional SEN (%)	Secondary Notional SEN (%)	
2) Deprivation	FSM6 % Primary	£1,038.91		18,169.55		£18,876,483	£63,590,295	15.70%	23.08%			
	FSM6 % Secondary		£942.06		12,033.28	£11,336,079			10.16%			
	IDACI Band F	£329.98	£433.14	7,344.24	4,224.90	£4,253,450			22.45%	19.18%		
	IDACI Band E	£412.48	£541.42	9,460.42	5,459.62	£6,858,203			22.45%	19.18%		
	IDACI Band D	£494.98	£649.71	7,697.95	4,370.05	£6,649,565			22.45%	19.18%		
	IDACI Band C	£577.47	£757.99	3,653.75	2,039.55	£3,655,901			22.45%	19.18%		
	IDACI Band B	£742.47	£974.56	7,133.54	3,832.41	£9,031,327			22.45%	19.18%		
	IDACI Band A	£907.46	£1,191.13	1,919.29	997.05	£2,929,287			22.45%	19.18%		
		Description	Primary amount per pupil	Secondary amount per pupil	Eligible proportion of primary NOR	Eligible proportion of secondary NOR	Sub Total	Total	Proportion of total pre MFG funding (%)	Primary Notional SEN (%)	Secondary Notional SEN (%)	
3) Looked After Children (LAC)	LAC X March 16	£0.00		495.83		£0	£4,562,599	0.00%	0.00%			
4) English as an Additional Language (EAL)	EAL 3 Primary	£195.02		12,710.47		£2,478,840		0.96%	0.00%			
	EAL 3 Secondary		£1,174.60		1,190.59	£1,398,466		0.00%		0.00%		
5) Mobility	Pupils starting school outside of normal entry dates	£1,584.07	£1,887.13	410.87	18.25	£685,293		0.17%	0.00%	0.00%		
		Description	Weighting	Amount per pupil	Percentage of eligible Y1-2 and Y3-6 NOR respectively	Eligible proportion of primary and secondary NOR respectively	Sub Total	Total	Proportion of total pre MFG funding (%)	Primary Notional SEN (%)	Secondary Notional SEN (%)	
6) Prior attainment	Low Attainment % new EFSP	47.34%			21.81%		£2,722,844	£7,076,242	1.75%	100.00%		
	Low Attainment % old FSP 73		£237.69		21.81%	11,455.45						
	Secondary pupils not achieving (KS2 level 4 English or Maths)		£486.99			8,939.46				£4,353,398		

Other Factors

Factor	Lump Sum per Primary School (£)	Lump Sum per Secondary School (£)	Lump Sum per Middle School (£)	Lump Sum per All-through School (£)	Total (£)	Proportion of total pre MFG funding (%)	Notional SEN (%)	
7) Lump Sum	£175,000.00	£175,000.00			£33,250,000	8.21%	0.00%	0.00%

8) Sparsity factor	£0.00	£0.00	£0.00	£0.00	£0	0.00%	0.00%	0.00%	
Please provide alternative distance and pupil number thresholds for the sparsity factor below. Please leave blank if you want to use the default thresholds. Also specify whether you want to use a tapered lump sum for one or both of the phases.									
Primary distance threshold (miles)		Primary pupil number average year group threshold		Fixed or tapered sparsity primary lump sum?	Fixed				
Secondary distance threshold (miles)		Secondary pupil number average year group threshold		Fixed or tapered sparsity secondary lump sum?	Fixed				
Middle schools distance threshold (miles)		Middle school pupil number average year group threshold		Fixed or tapered sparsity middle school lump sum?	Fixed				
All-through schools distance threshold (miles)		All-through pupil number average year group threshold		Fixed or tapered sparsity all-through lump sum?	Fixed				
9) Fringe Payments					£0	0.00%			
10) Split Sites					£375,405	0.09%	0.00%		
11) Rates					£5,157,092	1.27%	0.00%		
12) PFI funding					£5,809,920	1.43%	0.00%		
14) Exceptional circumstances (can only be used with prior agreement of EFA)									
Circumstance					Total (£)	Proportion of total pre MFG funding (%)	Notional SEN (%)		
Additional lump sum for schools amalgamated during FY16-17					£0	0.00%	0.00%	0.00%	
Additional sparsity lump sum for small schools					£0	0.00%	0.00%		
Exceptional Circumstance3					£0	0.00%	0.00%		
Exceptional Circumstance4					£0	0.00%	0.00%		
Exceptional Circumstance5					£0	0.00%	0.00%		
Exceptional Circumstance6					£0	0.00%	0.00%		
Total Funding for Schools Block Formula (excluding MFG Funding Total) (£)					£404,907,771	100.00%	£39,447,397		
15) Minimum Funding Guarantee (MFG is set at -1.5%)					£2,525,882				
Apply capping and scaling factors? (gains may be capped above a specific ceiling and/or scaled)					Yes				
Capping Factor (%)	0.00%	Scaling Factor (%)	100.00%						
Total deduction if capping and scaling factors are applied					-£1,019,048				
					Total (£)	Proportion of Total funding(%)			
MFG Net Total Funding (MFG + deduction from capping and scaling)					£1,506,834	0.37%			
High Needs threshold (only fill in if, exceptionally, a high needs threshold different from £6,000 has been approved)									
Additional funding from the high needs budget					£687,243.10				
Growth fund (if applicable)					£1,937,901.07				
Falling rolls fund (if applicable)					£0.00				
Total Funding For Schools Block Formula					£406,414,605				
% Distributed through Basic Entitlement					70.41%				
% Pupil Led Funding					88.99%				
Primary: Secondary Ratio					1 :	1.33			

Schools Block Illustrative Formula Funding							EY's Illustrative Funding for 3 / 4 year olds			TOTAL SB & EYB (3 + 4 year olds) FORMULA FUNDING ILLUSTRATIVE VARIANCE		
Phase	DfE	School	Schools Block Illustrative Formula Funding Variance from 2016/17 £	Illustrative Variance from 2016/17 as an amount per pupil £	Pupil Number Difference (Est Oct 16 - Oct 15)	Illustrative Variance as a % of Total R - Y6 Funding	Illustrative Variance as a % of Per Pupil Funding	2017/18 No.s (Estimate of October 2016 + Reception Uplift)	Early Years Single Funding Formula Illustrative Variance (based on 17/18 estimated hours)		Illustrative Variance in Hourly Rate in 2017/18	Illustrative Variance as a % of Hourly Rate Funding
PRIMARY	2173	Addingham Primary School	301	-36	2	0.04%	-0.93%	207				301
PRIMARY	2146	Aire View Infant School	61,107	-126	24	6.24%	-3.17%	271	-3,012	-0.07	-1.55%	58,095
PRIMARY	3000	All Saints' CE Primary School (Bradford)	83,992	-53	27	3.20%	-1.21%	631	-10,309	-0.31	-5.86%	73,683
PRIMARY	3026	All Saints' CE Primary School (Ilkley)	-13,063	-18	-2	-1.13%	-0.51%	320				-13,063
RECOUPMENT ACADEMY	2001	Beckfoot Allerton Primary Academy	-19,082	-65	2	-1.09%	-1.56%	421	-6,359	-0.24	-4.97%	-25,440
PRIMARY	2150	Ashlands Primary School	-28,379	-32	-4	-1.79%	-0.92%	447	-962	-0.05	-1.25%	-29,341
PRIMARY	2184	Atlas Community Primary School	-15,583	-75	0	-1.53%	-1.53%	208	-4,683	-0.32	-6.09%	-20,267
PRIMARY	3360	Baldon CE Primary School	-16,057	-47	1	-1.10%	-1.33%	416	-2,218	-0.08	-1.75%	-18,274
PRIMARY	2102	Bankfoot Primary School	-118,783	8	-27	-9.94%	0.19%	240	-8,398	-0.23	-4.59%	-127,181
RECOUPMENT ACADEMY	2020	Barkerend Academy	98,944	-81	30	5.24%	-1.80%	449	-14,643	-0.43	-7.82%	84,301
PRIMARY	2166	Ben Rhydding Primary School	-11,469	-55	0	-1.40%	-1.40%	210				-11,469
PRIMARY	2062	Blakehill Primary School	-16,091	-64	3	-1.03%	-1.72%	426				-16,091
PRIMARY	2075	Bowling Park Primary School	-14,172	-83	9	-0.49%	-1.85%	656	-7,774	-0.26	-4.98%	-21,946
PRIMARY	2107	Brackenhill Primary School	-42,160	-37	-6	-2.27%	-0.83%	407	-5,138	-0.17	-3.55%	-47,299
PRIMARY	3031	Burley & Woodhead CE Primary School	-11,933	-55	0	-1.44%	-1.44%	216				-11,933
PRIMARY	2203	Burley Oaks Primary School	-30,036	-38	-4	-2.02%	-1.10%	428				-30,036
PRIMARY	2036	Byron Primary School	-65,592	-100	-1	-2.45%	-2.29%	614	-14,261	-0.32	-6.20%	-79,853
PRIMARY	2087	Carrwood Primary School	-22,677	-51	-1	-1.27%	-0.98%	344	-6,610	-0.36	-6.47%	-29,286
PRIMARY	2094	Cavendish Primary School	-27,741	-54	-1	-1.49%	-1.27%	439	-7,219	-0.23	-4.70%	-34,960
RECOUPMENT ACADEMY	2013	Christ Church Primary Academy	-26,500	-117	-1	-2.92%	-2.39%	184	-3,142	-0.19	-4.00%	-29,641
PRIMARY	3024	Clayton CE Primary School	-6,332	-51	4	-0.40%	-1.35%	421	-4,322	-0.11	-2.46%	-10,654
PRIMARY	2015	Clayton Village Primary School	11,374	-102	7	1.23%	-2.21%	206				11,374
PRIMARY	2186	Copthorne Primary School	-37,112	-58	-3	-2.06%	-1.36%	423	-7,537	-0.18	-3.67%	-44,650
PRIMARY	2110	Cottingley Village Primary School	-16,363	-48	1	-1.04%	-1.28%	418	-2,279	-0.12	-2.68%	-18,643
PRIMARY	2111	Crossflatts Primary School	-42,815	-35	-8	-2.89%	-1.00%	410	-2,852	-0.09	-2.00%	-45,666
PRIMARY	2024	Crossley Hall Primary School	-65,695	-69	-6	-2.63%	-1.64%	590	-5,027	-0.17	-3.61%	-70,722
PRIMARY	2112	Cullingworth Village Primary School	46,633	-106	18	4.86%	-2.60%	253				46,633
PRIMARY	2167	Denholme Primary School	10,591	-77	6	1.25%	-1.77%	201	-2,120	-0.12	-2.65%	8,471
RECOUPMENT ACADEMY	2018	Dixons Marchbank Academy	-26,204	-62	0	-1.35%	-1.35%	426	-11,880	-0.30	-5.87%	-38,084
RECOUPMENT FREE SCH	2008	Dixons Music Primary	197,867	-202	60	18.67%	-4.67%	305				197,867
PRIMARY	3028	East Morton CE Primary School	-11,976	-39	-1	-1.47%	-1.00%	208				-11,976
PRIMARY	2147	Eastburn Junior and Infant School	-2,586	-52	2	-0.32%	-1.30%	204				-2,586
PRIMARY	2120	Eastwood Primary School	-3,146	-29	2	-0.18%	-0.67%	407	-10,978	-0.28	-5.50%	-14,124
PRIMARY	2113	Eldwick Primary School	19,300	-47	12	1.23%	-1.37%	467	-1,129	-0.04	-0.90%	18,172
PRIMARY	2103	Fagley Primary School	-11,876	-57	0	-1.12%	-1.12%	208	-8,659	-0.29	-5.67%	-20,535
PRIMARY	2084	Farfield Primary	4,618	-56	6	0.25%	-1.22%	408	-6,625	-0.23	-4.63%	-2,007
PRIMARY	2183	Farnham Primary School	-50,006	-87	-3	-2.66%	-1.97%	424	-9,190	-0.21	-4.29%	-59,196
PRIMARY	2065	Fearnville Primary School	-852	-94	7	-0.05%	-1.95%	368	-7,736	-0.28	-5.52%	-8,588
RECOUPMENT ACADEMY	2007	Feversham Primary Academy	-59,410	-43	-10	-3.32%	-0.97%	391	-13,403	-0.36	-6.91%	-72,812
PRIMARY	5201	Foxhill Primary School	-3,617	-53	2	-0.43%	-1.36%	215	-1,039	-0.07	-1.59%	-4,656
PRIMARY	2027	Frizinghall Primary School	-10,790	-58	3	-0.63%	-1.37%	406	-4,014	-0.16	-3.34%	-14,804
PRIMARY	2182	Girlington Primary School	-22,585	-77	2	-1.25%	-1.73%	410	-8,601	-0.25	-4.99%	-31,186
PRIMARY	2157	Glenaire Primary School	-10,807	-77	1	-1.15%	-1.64%	202	-2,315	-0.16	-3.39%	-13,121
PRIMARY	2034	Green Lane Primary School	-53,431	-59	-4	-1.95%	-1.30%	600	-12,344	-0.32	-6.06%	-65,775
PRIMARY	2033	Greengates Primary School	-3,107	-57	2	-0.34%	-1.29%	210	-3,509	-0.17	-3.52%	-6,616
PRIMARY	2093	Grove House Primary School	-13,100	-51	2	-0.82%	-1.30%	408	-2,747	-0.10	-2.26%	-15,847
RECOUPMENT ACADEMY	2114	Harden Primary Academy	2,769	-81	5	0.35%	-2.05%	209				2,769
RECOUPMENT ACADEMY	2121	Haworth Primary Academy	-2,535	-129	7	-0.27%	-3.21%	238	-2,734	-0.10	-2.15%	-5,269
PRIMARY	2038	Heaton Primary School	-70,355	-51	-9	-2.59%	-1.19%	624	-7,286	-0.13	-2.71%	-77,641
PRIMARY	3308	Heaton St Barnabas' CE Primary School	-54,964	-44	-9	-3.29%	-1.06%	391				-54,964
RECOUPMENT ACADEMY	2026	High Crags Primary Academy	-10,230	-93	6	-0.60%	-2.11%	394	-6,790	-0.25	-5.05%	-17,020
PRIMARY	5203	Hill Top CE Primary School	-10,119	-49	0	-1.17%	-1.17%	208	-3,411	-0.12	-2.69%	-13,530
PRIMARY	5204	Hollingwood Primary School	-22,147	-53	0	-1.31%	-1.31%	420	-2,731	-0.12	-2.60%	-24,878
PRIMARY	2196	Holybrook Primary School	-55,319	7	-11	-4.99%	0.13%	204	-8,732	-0.35	-6.55%	-64,051
PRIMARY	2123	Holycroft Primary School	20,776	-82	12	1.20%	-1.84%	400	-6,965	-0.26	-5.11%	13,811
PRIMARY	3379	Home Farm Primary School	11,337	-73	10	0.67%	-1.75%	415	-3,896	-0.13	-2.77%	7,441
PRIMARY	2029	Horton Grange Primary School	-24,586	-53	2	-0.92%	-1.23%	627	-9,195	-0.22	-4.45%	-33,781
PRIMARY	2180	Horton Park Primary School	-18,065	-66	2	-0.85%	-1.32%	424				-18,065
PRIMARY	2169	Hothfield Junior School	15,667	-68	9	1.45%	-1.74%	286				15,667
PRIMARY	2168	Hoyle Court Primary School	42,257	-88	17	3.78%	-2.18%	296				42,257

		Schools Block Illustrative Formula Funding					EY's Illustrative Funding for 3 / 4 year olds			TOTAL SB & EYB (3 + 4 year olds) FORMULA FUNDING ILLUSTRATIVE VARIANCE		
Phase	DfE	School	Schools Block Illustrative Formula Funding Variance from 2016/17 £	Illustrative Variance from 2016/17 as an amount per pupil £	Pupil Number Difference (Est Oct 16 - Oct 15)	Illustrative Variance as a % of Total R - Y6 Funding	Illustrative Variance as a % of Per Pupil Funding	2017/18 No.s (Estimate of October 2016 + Reception Uplift)	Early Years Single Funding Formula Illustrative Variance (based on 17/18 estimated hours)	Illustrative Variance in Hourly Rate in 2017/18	Illustrative Variance as a % of Hourly Rate Funding	
PRIMARY	3304	Idle CE Primary School	79,256	-111	30	7.78%	-2.96%	301				79,256
PRIMARY	2124	Ingrow Primary School	105,425	-114	31	7.28%	-2.45%	342	-5,987	-0.19	-3.98%	99,438
RECOUPMENT ACADEMY	2195	Iqra Primary Academy	82,144	-74	30	3.45%	-1.76%	595	-9,519	-0.32	-6.07%	72,624
PRIMARY	5207	Keelham Primary School	-4,642	-45	0	-0.94%	-0.94%	104	-869	-0.12	-2.62%	-5,511
PRIMARY	3363	Keighley St Andrew's CE Primary School	-42,309	-52	-5	-2.41%	-1.19%	401	-6,911	-0.30	-5.76%	-49,220
PRIMARY	5200	Killinghall Primary School	76,767	-70	29	3.02%	-1.68%	636	-11,095	-0.26	-5.04%	65,672
PRIMARY	2198	Knowleswood Primary School	-21,089	-77	2	-1.07%	-1.56%	403	-10,946	-0.34	-6.31%	-32,034
PRIMARY	2041	Lapage Primary School and Nursery	-40,087	-56	-1	-1.45%	-1.30%	636	-17,221	-0.32	-6.11%	-57,308
PRIMARY	2126	Laycock Primary School	-1,470	-15	0	-0.25%	-0.25%	100				-1,470
RECOUPMENT ACADEMY	2127	Lees Primary Academy	-9,574	-45	0	-1.14%	-1.14%	212				-9,574
PRIMARY	2090	Ley Top Primary School	-34,340	-82	-2	-2.37%	-1.73%	306	-5,233	-0.31	-6.03%	-39,574
PRIMARY	2043	Lidget Green Primary School	32,372	-44	13	1.41%	-1.01%	546	-9,304	-0.23	-4.61%	23,068
PRIMARY	2044	Lilycroft Primary School	-140,138	4	-33	-7.12%	0.10%	424				-140,138
PRIMARY	2002	Lister Primary School	-47,361	-33	-8	-2.76%	-0.77%	391	-5,894	-0.23	-4.74%	-53,255
PRIMARY	2128	Long Lee Primary School	44,666	-89	19	3.22%	-2.20%	362	-3,588	-0.13	-2.92%	41,078
PRIMARY	2145	Low Ash Primary School	-16,516	-49	1	-1.03%	-1.27%	416	-4,506	-0.14	-3.00%	-21,022
PRIMARY	3023	Low Moor CE Primary School	164	-55	6	0.01%	-1.44%	413				164
PRIMARY	2199	Lower Fields Primary School	-22,893	-56	0	-1.22%	-1.22%	409	-6,082	-0.23	-4.56%	-28,975
PRIMARY	2179	Margaret McMillan Primary School	81,404	-65	29	3.36%	-1.56%	610	-7,109	-0.20	-4.13%	74,295
PRIMARY	2048	Marshfield Primary School	-18,932	-95	5	-1.08%	-2.25%	421	-5,997	-0.25	-4.98%	-24,929
PRIMARY	2192	Menston Primary School	-9,027	-30	1	-0.63%	-0.87%	418				-9,027
RECOUPMENT ACADEMY	2014	Merlin Top Primary Academy	-16,508	-65	1	-1.04%	-1.34%	329	-6,331	-0.27	-5.29%	-22,839
PRIMARY	2185	Miriam Lord Community Primary School	-50,929	-20	-10	-3.03%	-0.46%	378	-7,500	-0.29	-5.60%	-58,429
PRIMARY	5206	Myrtle Park Primary School	-3,561	-53	2	-0.43%	-1.35%	215	-1,214	-0.08	-1.90%	-4,775
PRIMARY	2170	Nessfield Primary School	-20,145	-77	3	-1.24%	-1.95%	417	-4,133	-0.14	-3.14%	-24,278
PRIMARY	2054	Newby Primary School	-22,696	-54	0	-1.25%	-1.25%	422	-10,909	-0.32	-6.06%	-33,605
PRIMARY	2197	Newhall Park Primary School	16,241	-55	9	0.97%	-1.29%	402	-4,239	-0.20	-4.13%	12,003
RECOUPMENT ACADEMY	5205	Oakworth Primary Academy	-6,769	-50	4	-0.46%	-1.42%	415	-2,025	-0.07	-1.68%	-8,794
PRIMARY	2130	Oldfield Primary School	18,267	-391	6	5.00%	-5.68%	59				18,267
PRIMARY	3353	Our Lady & St Brendan's Catholic Primary School	-10,833	-52	0	-1.20%	-1.20%	207				-10,833
RECOUPMENT ACADEMY	3372	Our Lady of Victories Catholic Primary Academy	-8,199	-80	2	-0.84%	-1.76%	216	-5,717	-0.23	-4.66%	-13,916
RECOUPMENT ACADEMY	3375	Oxenhope CE Primary Academy	-6,329	-49	1	-0.79%	-1.27%	207				-6,329
PRIMARY	2064	Parkland Primary School	-9,835	-42	0	-0.84%	-0.84%	232	-4,533	-0.25	-5.09%	-14,368
PRIMARY	2132	Parkwood Primary School	-8,314	-126	3	-0.78%	-2.29%	197	-2,374	-0.23	-4.76%	-10,688
PRIMARY	3377	Peel Park Primary School	-108,329	-19	-22	-4.18%	-0.42%	561	-6,871	-0.24	-4.71%	-115,199
PRIMARY	2101	Poplars Farm Primary School	-13,880	-45	-1	-1.49%	-1.03%	213	-1,655	-0.08	-1.78%	-15,535
PRIMARY	2115	Priesthorpe Primary School	-21,399	21	-6	-2.71%	0.50%	182	-1,023	-0.10	-2.30%	-22,422
PRIMARY	2086	Princeville Primary School and Children's Centre	35,776	-82	19	1.46%	-1.87%	579	-7,608	-0.22	-4.41%	28,168
RECOUPMENT FREE SCH	2000	Rainbow Primary Free School	90,396	-166	31	6.26%	-3.51%	337				90,396
PRIMARY	2052	Reevy Hill Primary School	-1,551	-34	1	-0.15%	-0.67%	195	-3,539	-0.25	-5.03%	-5,089
PRIMARY	3365	Riddlesden St Mary's CE Primary	-37,796	-47	-5	-2.46%	-1.15%	373	-2,338	-0.12	-2.62%	-40,134
PRIMARY	5202	Russell Hall Primary School	-13,509	-45	-1	-1.55%	-1.07%	208	-2,426	-0.10	-2.23%	-15,935
RECOUPMENT ACADEMY	2003	Ryecroft Primary Academy	106,818	-106	27	7.15%	-2.04%	315	-6,558	-0.36	-6.55%	100,260
PRIMARY	2140	Saltaire Primary School	-16,007	-38	0	-1.01%	-1.01%	424				-16,007
PRIMARY	2174	Sandal Primary School and Nursery	-15,257	-46	1	-1.04%	-1.28%	407	-1,661	-0.07	-1.57%	-16,918
PRIMARY	2055	Sandy Lane Primary School	-25,856	-43	-3	-2.00%	-1.05%	310				-25,856
RECOUPMENT ACADEMY	2178	Shibden Head Primary Academy	-879	-44	5	-0.06%	-1.24%	422				-879
PRIMARY	3366	Shipleigh CE Primary School	-10,788	-51	0	-1.19%	-1.19%	210	-2,280	-0.12	-2.71%	-13,067
RECOUPMENT ACADEMY	2077	Shirley Manor Primary Academy	-30,500	20	-7	-3.34%	0.42%	180	-2,838	-0.18	-3.69%	-33,338
RECOUPMENT ACADEMY	2023	Southmere Primary Academy	14,914	-111	12	0.94%	-2.43%	359	-5,302	-0.22	-4.49%	9,612
RECOUPMENT ACADEMY	2025	Dixons Manningsham Primary Academy	-19,543	-61	1	-1.11%	-1.36%	394	-4,325	-0.32	-6.12%	-23,868
RECOUPMENT ACADEMY	3369	St Anne's Catholic Primary Academy	-87,487	13	-22	-7.48%	0.32%	261	-3,170	-0.23	-4.70%	-90,657
PRIMARY	3333	St Anthony's Catholic Primary School (Clayton)	-13,938	-66	0	-1.56%	-1.56%	211	-2,938	-0.14	-3.05%	-16,876
PRIMARY	3373	St Anthony's Catholic Primary School (Shipleigh)	-6,343	-51	0	-1.05%	-1.05%	125				-6,343
PRIMARY	3334	St Clare's Catholic Primary School	3,887	-80	4	0.43%	-1.67%	191				3,887
PRIMARY	3335	St Columba's Catholic Primary School	-41,263	-63	-4	-2.49%	-1.44%	373	-9,863	-0.30	-5.80%	-51,126
PRIMARY	3354	St Cuthbert & the First Martyrs' Catholic Primary	-10,545	-50	0	-1.19%	-1.19%	209	-2,479	-0.22	-4.54%	-13,025
PRIMARY	3351	St Francis' Catholic Primary School	-3,513	-76	3	-0.41%	-1.84%	209	-2,514	-0.13	-2.82%	-6,026
PRIMARY	3016	St James' Church Primary School	51,812	-54	15	3.17%	-1.13%	360	-5,241	-0.25	-4.98%	46,571
RECOUPMENT ACADEMY	3352	St John The Evangelist Catholic Primary	-3,522	-57	2	-0.42%	-1.38%	207				-3,522
PRIMARY	5208	St John's CE Primary School	-26,887	-54	-1	-1.53%	-1.29%	419	-10,233	-0.26	-5.18%	-37,120
PRIMARY	3367	St Joseph's Catholic Primary School (Bingley)	-6,294	-49	1	-0.78%	-1.25%	208				-6,294

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PRIMARY	3338	St Joseph's Catholic Primary School (Bradford)	-54,500	-57	-8	-3.68%	-1.27%	320	-6,297	-0.33	-6.31%	-60,798
RECOUPMENT ACADEMY	3370	St Joseph's Catholic Primary, Keighley	-121,461	2	-29	-10.00%	0.04%	260	-3,729	-0.17	-3.48%	-125,190
PRIMARY	3021	St Luke's CE Primary School	-10,542	-50	0	-1.14%	-1.14%	212				-10,542
PRIMARY	3347	St Mary's and St Peter's Catholic	-12,320	-60	0	-1.22%	-1.22%	207	-6,729	-0.39	-7.27%	-19,049
PRIMARY	3355	St Matthew's Catholic Primary School	-23,258	-44	-3	-2.36%	-0.95%	207	-5,343	-0.26	-5.23%	-28,601
PRIMARY	3013	St Matthew's CE Primary School	-74,448	-55	-12	-4.08%	-1.29%	412	-4,593	-0.21	-4.31%	-79,041
RECOUPMENT ACADEMY	2010	St Oswald's CE Primary Academy	-45,644	-45	-6	-2.49%	-0.97%	383	-5,678	-0.28	-5.38%	-51,322
PRIMARY	3301	St Paul's CE Primary School	-10,400	-50	0	-1.18%	-1.18%	208				-10,400
RECOUPMENT ACADEMY	2022	St Philip's CE Primary Academy	-3,227	-61	2	-0.33%	-1.29%	208	-3,895	-0.25	-4.98%	-7,122
PRIMARY	3313	St Stephen's CE Primary School	85,546	-100	29	5.08%	-2.28%	414	-9,628	-0.31	-5.99%	75,918
PRIMARY	3371	St Walburga's Catholic Primary School	-9,483	-45	0	-1.14%	-1.14%	209	-1,850	-0.13	-2.78%	-11,333
PRIMARY	3349	St William's Catholic Primary School	4,202	-75	4	0.47%	-1.59%	195				4,202
RECOUPMENT ACADEMY	3350	St Winefride's Catholic Primary	-17,771	-52	1	-1.11%	-1.35%	419	-3,427	-0.16	-3.46%	-21,198
PRIMARY	2134	Stanbury Village School	-3,492	78	-2	-0.78%	1.53%	86	-948	-0.12	-2.66%	-4,439
PRIMARY	2148	Steeton Primary School	18,855	-95	12	1.61%	-2.39%	305				18,855
PRIMARY	2081	Stocks Lane Primary School	44,951	-296	18	7.86%	-6.21%	138				44,951
PRIMARY	2057	Swain House Primary School	-42,253	-41	-6	-2.40%	-0.99%	415	-5,477	-0.14	-2.95%	-47,731
PRIMARY	2058	Thackley Primary School	25,408	-69	15	1.72%	-1.91%	420	-3,363	-0.09	-1.95%	22,045
RECOUPMENT ACADEMY	3368	The Sacred Heart Catholic Primary Academy	-32,560	8	-9	-4.09%	0.20%	201				-32,560
RECOUPMENT ACADEMY	2060	Thornbury Academy	-158,562	-177	-12	-5.96%	-4.08%	599	-10,530	-0.29	-5.50%	-169,092
PRIMARY	2061	Thornton Primary School	-14,531	-56	5	-0.65%	-1.49%	594	-2,570	-0.09	-1.90%	-17,101
PRIMARY	2200	Thorpe Primary School	-10,761	-51	0	-1.17%	-1.17%	210				-10,761
PRIMARY	3362	Trinity All Saints CE Primary School	-39,044	-24	-8	-3.04%	-0.62%	321	-1,907	-0.12	-2.62%	-40,950
PRIMARY	2135	Victoria Primary School	51,576	-30	13	4.78%	-0.67%	250	-4,181	-0.23	-4.65%	47,396
PRIMARY	2071	Wellington Primary School	-23,548	-46	-1	-1.42%	-1.19%	424	-5,396	-0.13	-2.75%	-28,944
PRIMARY	2193	Westbourne Primary School	-29,651	-52	-2	-1.67%	-1.18%	397	-8,407	-0.32	-6.09%	-38,058
RECOUPMENT ACADEMY	2028	Westminster CE Primary Academy	-7,735	-168	21	-0.29%	-3.75%	606	-9,518	-0.29	-5.59%	-17,253
RECOUPMENT ACADEMY	2012	Whetley Primary Academy	-144,572	-3	-33	-6.02%	-0.07%	521	-7,354	-0.27	-5.32%	-151,925
PRIMARY	2074	Wibsey Primary School	-18,182	-54	4	-0.74%	-1.37%	631	-6,251	-0.15	-3.15%	-24,433
PRIMARY	2117	Wilsden Primary School	-2,749	-49	5	-0.19%	-1.39%	416				-2,749
PRIMARY	3035	Woodlands CE Primary School	-4,377	-43	0	-0.88%	-0.88%	101				-4,377
RECOUPMENT ACADEMY	2078	Woodside Academy	93,398	-94	29	5.37%	-2.06%	411	-5,999	-0.18	-3.76%	87,399
PRIMARY	2202	Worth Valley Primary School	-3,154	-66	2	-0.34%	-1.36%	195	-4,504	-0.21	-4.23%	-7,659
PRIMARY	2100	Worthinghead Primary School	-17,191	-65	-1	-1.95%	-1.45%	197				-17,191
PRIMARY	3036	Wycliffe CE Primary School	62,631	-98	23	5.54%	-2.44%	304				62,631
	Min		-158,562	-391	-33	-10.00%	-6.21%	59	-17,221	-42.55%	-7.82%	-169,092
	Max		197,867	78	60	18.67%	1.53%	656	-869	-3.81%	-0.90%	197,867
	Median		-10,833	-54	1	-1.04%	-1.30%	362	-5,302	-21.93%	-4.49%	-14,124

Notes

2017/18 illustrative Schools Block formula funding is based on an ESTIMATE of OCTOBER 2016 CENSUS NUMBERS - the October 2016 census numbers will not be available until later this term.
 2017/18 illustrative Schools Block formula funding includes an estimate for rates.

The EYSFF Variance does not take into account any changes in pupil numbers between 2016/17 and 2017/18.
 The EYSFF Variance does not include the impact for some schools of the indicative increase for 2 year old funding (for these schools the loss in 3 / 4 year old funding will be somewhat offset by the gain in 2 year old funding)

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Schools Block Illustrative Formula Funding								
Phase	DfE	School	Schools Block Illustrative Formula Funding Variance from 2016/17 £	Illustrative Variance as an amount per pupil £	Pupil Number Difference (Est Oct 16 - Oct 15)	Illustrative Variance as a % of Total Y7 - Y11 Funding	Illustrative Variance as a % of Per Pupil Funding	2017/18 No.s (Estimate of October 2016 Y7 -Y11 pupils)
RECOUPMENT ACADEMY	4064	Beckfoot Academy	-119,619	-77	-3	-1.63%	-1.41%	1,334
RECOUPMENT ACADEMY	4025	Beckfoot Upper Heaton Academy	17,296	-102	8	0.78%	-1.55%	346
RECOUPMENT ACADEMY	4041	Belle Vue Girls' Academy	-71,421	-80	0	-1.42%	-1.42%	894
SECONDARY	5400	Bingley Grammar School	-79,293	-69	5	-1.10%	-1.43%	1,493
RECOUPMENT ACADEMY	4001	Buttershaw Business & Enterprise College Academy	-116,068	-123	8	-1.46%	-2.05%	1,337
SECONDARY	4100	Carlton Bolling College	-128,265	-80	-6	-1.85%	-1.34%	1,157
RECOUPMENT ACADEMY	6905	Dixons City Academy	-76,874	-73	-3	-1.73%	-1.37%	830
RECOUPMENT FREE SCH	4024	Dixons McMillan Academy	549,343	-267	112	32.39%	-4.56%	401
RECOUPMENT FREE SCH	4010	Dixons Trinity Academy	188,107	-108	45	6.56%	-1.94%	560
RECOUPMENT ACADEMY	4021	Bradford Forster Academy	553,264	-298	105	29.94%	-4.65%	394
RECOUPMENT ACADEMY	4613	Feversham College	90,593	-97	25	2.76%	-1.65%	583
RECOUPMENT ACADEMY	4101	Grange Technology College	-155,114	-92	-3	-1.62%	-1.42%	1,480
SECONDARY	5401	Hanson School	-102,709	-86	2	-1.29%	-1.44%	1,336
RECOUPMENT ACADEMY	4502	Ilkley Grammar School	-87,730	-64	-2	-1.58%	-1.42%	1,220
RECOUPMENT ACADEMY	4616	Immanuel College Academy	-43,183	-74	9	-0.71%	-1.46%	1,199
RECOUPMENT FREE SCH	4004	Dixons Kings Academy	-80,483	-76	-3	-1.74%	-1.39%	838
RECOUPMENT ACADEMY	5404	Laisterdyke Leadership Academy	-179,587	-119	-13	-3.46%	-2.01%	868
RECOUPMENT ACADEMY	5402	Beckfoot Oakbank Academy	-92,589	-96	7	-1.31%	-1.83%	1,343
RECOUPMENT ACADEMY	4019	Oasis Academy Lister Park	-39,932	-85	4	-0.90%	-1.43%	750
RECOUPMENT FREE SCH	4013	One In A Million (Free School)	311,035	-263	60	22.76%	-4.12%	274
SECONDARY	4112	Parkside School	-4,448	-72	12	-0.10%	-1.47%	880
RECOUPMENT ACADEMY	4069	Queensbury Academy	26,960	-214	41	0.57%	-3.95%	912
RECOUPMENT ACADEMY	4006	Samuel Lister Academy	-104,526	-77	-10	-2.96%	-1.29%	583
SECONDARY	4023	St Bede's & St Joseph's Catholic College	-380,784	-73	-50	-4.44%	-1.36%	1,551
SECONDARY	4610	The Holy Family Catholic School	-6,167	-79	10	-0.16%	-1.48%	756
RECOUPMENT ACADEMY	5403	Beckfoot Thornton Academy	-37,835	-75	11	-0.58%	-1.44%	1,264
SECONDARY	4074	Titus Salt School	-153,244	-73	-11	-2.12%	-1.22%	1,201
SECONDARY	4036	Tong High School	-591,894	-80	-77	-7.65%	-1.22%	1,106
RECOUPMENT ACADEMY	6909	University Academy Keighley	-215,487	-86	-23	-5.00%	-1.19%	574
		Min	-591,894	-298	-77	-7.65%	-4.65%	274
		Max	553,264	-64	112	32.39%	-1.19%	1,551
		Median	-79,293	-80	4	-1.31%	-1.44%	894

Notes

2017/18 estimated Schools Block formula funding is based on an ESTIMATE of OCTOBER 2016 CENSUS NUMBERS - the October 2016 census numbers will not be available until later this term.

2017/18 estimated Schools Block formula funding includes an estimate for rates.

Appendix 2b - 2017/18 Indicative Worst Case Scenario Modelling - All-through schools

			Schools Block Illustrative Formula Funding					
Phase	DfE	School	Schools Block Illustrative Formula Funding Variance from 2016/17 £	Illustrative Variance as an amount per pupil £	Pupil Number Difference (Est Oct 16 - Oct 15)	Illustrative Variance as a % of Total R - Y11 Funding	Illustrative Variance as a % of Per Pupil Funding	2017/18 No.s (Estimate of October 2016 R -Y11 pupils)
RECOUPMENT ACADEMY	6907	Appleton Academy	117,443	-78	42	1.98%	-1.54%	1,216
RECOUPMENT ACADEMY	6906	Bradford Academy	165,307	-81	55	2.14%	-1.54%	1,528
RECOUPMENT FREE SCH	6102	Bradford Girls Grammar (Free School)	47,849	-72	23	1.28%	-1.55%	823
RECOUPMENT ACADEMY	6908	Dixons Allerton Academy	258,550	-120	81	3.48%	-2.24%	1,464
		<i>Min</i>	47,849	-120	23	1.28%	-2.24%	823
		<i>Max</i>	258,550	-72	81	3.48%	-1.54%	1,528
		<i>Median</i>	141,375	-80	49	2.06%	-1.55%	1,340

Notes

2017/18 illustrative Schools Block formula funding is based on an ESTIMATE of OCTOBER 2016 CENSUS NUMBERS - the October 2016 census numbers will not be available until later this term.

2017/18 illustrative Schools Block formula funding includes an estimate for rates.

SCHOOLS FORUM AGENDA ITEM

For Action



For Information



Brief Description of Item (including the purpose / reason for presenting this for consideration by the Forum)

This report provides a further update on Early Years DSG funding matters and the consultation document to be published, which sets out proposals for Bradford's Early Years Single Funding Formula for the 2017/18 financial year.

Date (s) of any Previous Discussion at the Forum

A report on the DfE's consultation on Early Years Funding reform was presented to the School Forum on 21 September 2016. This included the Authority's response to the DfE's consultation. This response was submitted on 21 September.

Background / Context

At the Schools Forum meeting 20 July 2016 it was reported that a further £1.2m of unspent resource is available from the DSG's earmarked funding previously allocated for the development of the 2 Year Old Offer. It was reported that the total under spending in this budget at 31 March 2016 was £1.95m, with £0.75m having already been committed by the Forum to continuing the development and take up of 2 year old places. The Business Advisor (Schools) recommended at the meeting, having discussed this with lead officers, that the £1.2m is released back to the DSG to support the significant financial pressures in the High Needs Block in 2016/17. The Forum asked that this be referred to the Early Years Working Group (EYWG) for consideration.

The Government's new 30 hours free entitlement for 3 and 4 years olds of working parents is to be implemented from September 2017. Bradford is an 'early innovator' authority. A project board is overseeing our development work, including the development of pilot delivery from September 2016. Funding will begin in and from the DSG for this additional offer from September 2017 (7/12ths in 2017/18). The DfE estimates an additional 2,398 PTE to be funded in Bradford, with DSG funding of £6.25m on a full year on-going basis.

Further explanation of the DfE's proposals for Early Years Funding reform, and the implications for early years providers in the Bradford District, is included in the consultation document at Appendix 1.

Details of the Item for Consideration

Please see Appendix 1, which is our consultation and information document proposed to be published. This document sets out our understanding of the implications of the DfE's reform of Early Years Funding (a new National Funding Formula) on Bradford's early years funding levels, our immediate proposed response for the 2017/18 financial year to the DfE's changes and then how we propose to move to new funding arrangements, which the DfE proposes to be in place from 1 April 2019 at the latest. The Technical Statement and Timetable in Appendix 1 explains in detail how funding for the early years free entitlements is proposed to be calculated and delegated for individual early years providers.

The consultation focuses on proposals for the structure of our Early Years Single Funding Formula for the 2017/18 financial year; how we calculate and allocate funding for the free entitlements. As with the Primary and Secondary formulae consultation, we stress that the Schools Forum will continue to discuss the rates of funding before making final recommendations on these, in the round, on 11 January 2017.

However, the consultation document does give indicative sight of potential setting base rates for the 2017/18 financial year, as well as a view about how these rates may reduce over the period 2017-2019 if the DfE's proposals for Early Years Funding reform are implemented. The estimated trajectory of funding rates is shown in the table on page 5. The Early Years Working Group (EYWG) considered this consultation document, and these rates, at its meeting on 3 October. This Group's feedback is set out below.

There are 2 aspects of the DfE's proposals, where it is still currently unclear whether these are to be implemented at April 2017 or April 2019:

Details of the Item for Consideration (continued)

- The restrictions around the type of formula supplements, meaning that our current supplement for nursery schools would not be permitted. We assume in our proposals for 2017/18 that we can continue this supplement as this appears to follow the spirit of the DfE's proposals, which aim for stability for nursery schools over the 2017-2019 transition period. However, if we cannot, we will need to revise our proposals e.g. by converting this supplement to base rate funding for the nursery schools.
- The capping of total spending on supplements, including deprivation, to 10% of budget. Our consultation document proposes to move our deprivation spending to 10% of budget at April 2017 so that we are not 'caught out' where this restriction comes into place at April 2017 and is announced after the Schools Forum has made its recommendations on the 2017/18 DSG in January 2017. It is currently unclear when the DfE will publish its response to its consultation and confirm arrangements for 2017/18.

Feedback from the EYWG on 2017/18 Proposal and Arrangements

In considering the proposals set out in Appendix 1, the EYWG emphasised the need to provide for as much continuity as possible in 2017/18, to give as much time as possible for providers to respond to funding change. The EYWG was generally supportive of the technical structural proposals set out in the consultation document, but wishes in particular to further analyse:

- The impact of the reduction of spending on deprivation from 13.2% to 10% of budget.
- The implications for fully spending / not fully spending the value of the DfE's Nursery School Supplement on our nursery schools.
- The comparability of the level of reduction in funding in 2017/18 for the 3 types of provider (Nursery schools, nursery classes and PVI providers).

A further meeting of the EYWG is planned for November. A further report will be presented to the Schools Forum in December, alongside the response to the consultation.

One of the key matters the EYWG discussed was the funding of provision in early years for children with SEND. The EYWG agreed the need to take forward further work to analyse and look at options to enable providers to be better supported for meeting the costs of provision. The EYWG has asked the Local Authority to progress this.

Recommendation from the EYWG on the £1.2m One off Monies

The Forum asked back in July 2016 that the options for the use of the £1.2m be referred to the Early Years Working Group for consideration. The EYWG recommends that the £1.2m is earmarked for 2 purposes:

- To help in the response to ensure that sufficient funding is available to support early years providers with the cost of meeting the needs of children with SEND going forward.
- To provide short-term protection to ameliorate against the full impact of the reduction in setting base rates for the 3 and 4 year old offer in 2017/18 that comes from the reduction in the Early Years Block allocated by DfE.

The use of the £1.2m in these ways will be further considered by the EYWG at its next meeting. The Schools Forum will be asked to make a recommendation in January 2017. This will need to be considered 'in the round' and in the context of the overall DSG spending position in 2016/17 (how much one off monies are available in total, including the balances of established reserves).

Implications for the Dedicated Schools Grant (DSG) (if any)

Direct implications – as outlined in Appendix 1

Recommendations

The Schools Forum is asked to consider the matters raised in the report and agree for the consultation document to be published.

List of Supporting Appendices / Papers (where applicable)

Appendix 1 – Consultation – Bradford District's Early Years Single Funding Formula 2017/18.

Contact Officer (name, telephone number and email address)

Andrew Redding, Business Advisor (Schools)

01274 432678

andrew.redding@bradford.gov.uk

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Consultation - Bradford District Early Years Single Funding Formula 2017/18

1) Introduction

1.1 Attached with this introduction is the full Technical Statement, which sets out the proposed methodology and timetable for the calculation of funding allocations for individual providers delivering the 2, 3 and 4 year old free entitlements in 2017/18. This Statement includes direction on the funding of the extended 30 hours free entitlement for eligible 3 and 4 years olds from September 2017.

1.2 Our proposals also incorporate our immediate response to the changes set out by Government in its consultation on national funding formula and early years funding reform, which can be accessed [here](#). These reforms will have significant implications for the funding of early years provisions in Bradford. There are some aspects of the Government's reforms where it is currently unclear when change is required to be implemented from, April 2017 or April 2019, especially in changes to the funding of nursery schools. In pulling our proposals together, we have assumed that we can continue in 2017/18 to fund nursery schools as we currently do now. If it is confirmed by Government that this is not possible, we will need to revisit some of our proposals.

1.3 Please note that the values of funding rates quoted in this consultation document, including the Setting Base Rates, are indicative only at this stage and should be viewed with caution. These indicative rates are highlighted in yellow. It is expected that rates of funding for 2017/18 will be set following the Schools Forum meeting on 11 January 2017. The rates presented in this document do however, incorporate our initial estimate of the impact of the reduction in Bradford's Early Years Block funding at April 2017 that is set out in the Government's funding reform consultation document. Therefore, these do give providers some sight of the scale of reduction in the funding that they will receive from the Local Authority in 2017/18. Further reductions will take place in 2018/19, as set out in the impact assessment paragraph below.

1.4 We have briefed previously on our expectation that, because we currently fund our early years provision within the Dedicated Schools Grant (DSG) at a rate that is significantly higher than the national average, and in most other authorities, we are likely to lose from national formula funding arrangements. For reference (as a starting point for understanding and for comparison):

Bradford's 2016/17 DSG Early Years Block currently is £39.18m. This is 7.8% of the total DSG. It is made up of the following elements:

- 3 and 4 Year Old Offer £29.91m (76%)
- 2 Year Old Offer £8.93m (23%)
- Early Years Pupil Premium £0.34m (1%)

Our current 2016/17 Early Years Single Funding Formula allocates funding to providers as follows:

- A 2 Year Old Offer universal setting rate £4.83 per hour
- 3 and 4 Year Old setting base rates x3:
 - Nursery schools £5.70 per hour
 - PVI providers £4.62 per hour
 - Nursery classes £4.13 per hour
- An additional individual setting 3 and 4 year old deprivation rate, calculated using a 3 year rolling IDACI average. 13.2% of the total 3 and 4 year old budget is allocated via this factor. The mean average rate is £0.68 per hour.
- An additional sustainability lump sum, incorporating catering costs, for nursery schools; total allocation of £0.38m.
- An additional allocation, £333 per term, for Looked After Children in all settings.
- The Early Years Pupil Premium to the formula and conditions set by the DfE (£0.53 per hour for eligible children).

The distribution between settings of children taking up the free entitlement offers (based on 2016/17 indicative numbers) is as follows:

- 2 Year Old: 11% nursery schools; 18% nursery classes; 71% PVI providers
- 3 and 4 Year Old: 7% nursery schools; 37% PVI providers; 57% nursery classes

1.5 A detailed report was presented to the Schools Forum on 21 September 2016 on the Government's planned early years funding reform and the implications for the Bradford District. To summarise our initial view of the impact of the Government's plans:

- A quite substantial (7%) increase in funding for the 2 year old offer from April 2017 (a £0.6m gain to Bradford on January 2016 numbers), with the rate of funding per hour for providers possibly increasing from £4.83 to £5.20.
- A substantial (10%) reduction in funding for the 3 and 4 year old offer, of £3.01m in the DSG on January 2016 numbers, meaning funding rates for 3 and 4 year old free entitlement provision will need to reduce, especially for nursery schools and PVI providers, starting from April 2017. This is funding lost from the District; it is not retained to be recycled into another part of the Dedicated Schools Grant.
- Nationally, 112 authorities are gaining from the Government's proposals; 38 are losing (a number of London authorities are particularly negatively affected; Bradford's position is the worst of Yorkshire regional authorities).
- A significant alteration in the distribution of funding between providers within Bradford. A flattening of this distribution as a result of the proposal for a universal base rate.
- Very significant implications for the levels of DSG funding to nursery schools. The DfE indicates that there will be further consultation on this, with transitional protection in place "for at least" 2 years.
- A weakening of the proportion of funding allocated to deprivation (so a further flattening of the distribution on top of that from the universal base rate).
- Transitional protections in place 2017-19 meaning the full value of loss is not felt immediately, but substantial losses will still need to be managed in these transitional years (especially in 2018/19).
- Some lack of clarity on whether various restrictions come into place at April 2017 or April 2019.

1.6 A summary of the Government's structural proposals behind these points, as these affect provider-level allocations (*with Bradford's context shown in italics*):

- The calculation of allocations to early years providers will remain under the management of local authorities but under tight national statutory restrictions.
- 2 year old funding and the Early Years Pupil Premium, on their existing formulae, will continue.
- Authorities must have established a single universal base rate of funding for all providers by April 2019 at the latest (with encouragement for earlier implementation). *We currently have 3 different Setting Base Rates for different types of providers.*
- The amount by which the Early Years Block can be 'topsliced' for centrally managed funds is restricted to 5% of the total budget. *We currently topslice 1%.*
- Authorities must have a deprivation factor and can continue to set their own method for allocating this to providers, but the total of spending on all supplements is limited to 10% of the budget. *We currently spend 13.2% on deprivation.*
- The types of supplements authorities can use will be restricted to: deprivation (mandatory), rurality (optional), key policy objectives e.g. flexibility (optional). *We have not previously employed any of these supplements. However, this means that our current lump sum funding (to nursery schools) and sustainability mechanisms would not be permitted. Unclear whether this restriction applies from April 2017 or April 2019.*
- Authorities are encouraged to introduce (if not in place already) funds for inclusion for SEND children. These can be funded from the Early Years Block. *We have these funds in place already.*
- The Minimum Funding Guarantee will no longer be applied in the Early Years Block. *Currently, this MFG restricts the value of reduction in the setting base rate to a maximum of 1.5% on the rate in the previous financial year.*
- A new grant stream within the DSG, which will allocate funding on an annual basis for children in receipt of Disability Living Allowance (DLA).

2) Bradford's Early Years Single Funding Formula – Proposals for 2017/18 in Response to Government Funding Reform

2.1 Our proposals for amendment to Bradford's Early Years Single Funding Formula (EYSFF) for the 2017/18 financial year, in response to the Government's announcement, are based on the following guiding principles:

- The Early Years Block (EYB) must be self contained and must not require contributions from the other 2 DSG Blocks in 2017/18 and in the future.
- The DfE's Nursery School Supplement should be spent on Nursery Schools, not diverted to any other purpose, so long as this funding continues. There are options for how this supplement (or an element of this supplement can be used).
- The EYB should continue to contribute to High Needs Block (HNB) pressures, especially HNB funds that directly support early years activities. However, the value of this contribution must be controlled and assessed in the context of the reduction in EYB funding that will need to be managed 2017-19.
- The values of funding rates for the 3 and 4 year old entitlement for settings will reduce in 2017/18 because the Early Years Block is reducing. It will also be helpful to start to make change towards a new required funding approach in 2017/18. However, it is unrealistic, in the time we have before the 2017/18 DSG allocation is set at the beginning of January 2017, for the Authority with the Schools Forum, to develop, test, properly consult on and communicate significant formula change, such as the introduction of a universal base rate, in time for providers to react and amend their business models for April 2017. It is also the case that we may not know the final outcomes of the DfE's consultation until late in the autumn term or early in the new year, giving even less time to react to establish arrangements for 2017/18 on a certain basis.
- In assessing what we do for 2017/18, the trajectory and final expected position of the EYB at April 2019 must be followed to avoid making a change in 2017/18, for example, that is then reversed in 2018/19 or in 2019/20 because the Government's funding reform is going in the opposite direction.

Question 1 – Do you agree with the guiding principles? If not, please can you explain why not.

2.2 The Government has outlined its expectation that local authorities will be 'on formula' according to reformed arrangements by April 2019 at the latest, with encouragement to implement earlier if possible. Our proposal for the outline timetable for the amendment of Bradford's EYSFF in response the Government's funding reform, across the 2017-2019 period, is as follows:

- For 2017/18 – continuity - by maintaining the overall structure of Bradford's current EYSFF, which includes continuing different setting base rate values and additional nursery school funding, but with some adjustments to follow the expected trajectory for / in:
 - Deprivation & SEN Funding rates with the reduction to 10% maximum spend
 - The Nursery School Supplement
 - Overall affordability (responding the DSG EYB reduction)
- For 2018/19 – adoption of new arrangements under protection - the adoption of new formula arrangements, including a universal base rate and reviewed supplements under an additional transitional protection mechanism but incorporating the necessary response to the expected further reduction in EYB funding. This will include transferring the full spending of the Nursery School Supplement to a separate sustainability factor, to enable a universal base rate to be established.
- 2019/20: full adoption of new formula arrangements - including a universal base rate and reviewed supplements, without any protections, incorporating the necessary response to the expected further reduction in EYB funding. This may or may not include the removal of the Nursery School Supplement, which the Government has indicated it will consult further on.

2.3 Following this timetable, the Authority expects to complete review work and to publish a consultation on new formula arrangements in Bradford, which would be implemented at April 2018, in June or July 2017.

Question 2 – Do you agree with proposed timetable for implementing early years formula funding change in Bradford across 2017-2019? If not, please can you explain why not.

2.4 In summary, we propose to calculate allocations for early years providers in the 2017/18 financial as follows:

- Using the technical, administrative, payment and counting arrangements, and timetable, that are already established and have been used to calculate and pay allocations in the current 2016/17 financial year. The full details of these arrangements are set out in the Technical Statement. The administration of the extended 30 hours offer from September 2017 will be brought into these existing administrative arrangements. Specific guidance, where necessary, on the 30 hours has been written into the Statement (some guidance has still to be confirmed in later iterations of the Technical Statement). There are some small technical adjustments needed with the implementation of the extended 30 hours entitlement.

Question 3 – Do you agree with the proposal to continue the existing technical, administrative, payment and counting arrangements in 2017/18, and to extend these arrangements to the funding of the extended 30 hours entitlement for 3 and 4 years olds? If not, please can you explain why not.

- The 2 Year Old Offer:
 - The simple universal rate of funding per hour for all types of provider, without supplement, will be retained.
 - This rate will be set at the value of the rate the Government funds the Early Years Block (EYB) i.e. 100% pass through of the Government's rate to providers. Currently, the EYB funded rate is £4.85 per hour and providers are funded at £4.83 per hour. The DfE indicates that our rate of funding for 2017/18 will be increased to £5.20 (this still to be confirmed). On this indicative basis, we would fund providers at the £5.20 rate.

Question 4 – Do you agree with the proposed approach to funding the 2 year old free entitlement in 2017/18? If not, please can you explain why not.

- The 3 and 4 Year Old Offer, incorporating the extended 30 hours entitlement, we propose to:
 - Continue to use 3 different Setting Base Rates (nursery classes, nursery schools and PVI providers). The same rates will be used to fund the 15 and the 30 hour entitlements in each type of setting.
 - Continue our current Deprivation and SEN Supplement, using the 3 year average of IDACI data. However, we will reduce our total spending from 13.2% of budget currently to 10% of budget (which is a reduction of about £1m), which will reduce the values of Deprivation & SEN funding rates for providers. There is some uncertainty about the 10% restriction will be in place 2017, but there is rationale for making this change now, in particular as it helps protect the value of the base rate especially for PVI providers.
 - Cease the separate (and additional) formula funding for looked after children, currently funded at £333 per term (a total spend of £21,600 in 2015/16). Looked After Children will continue to receive additional funding through the Early Years Pupil Premium.
 - Bring the catering supplement for nursery schools into the nursery school setting base rate and deprivation rate funding (this is a technical change that does not change levels of funding allocated to individual schools).
 - Continue the nursery school sustainability supplement, without reduction, but bring the extended 30 hours into the calculation of this from September 2017. There is uncertainty about whether this supplement will be permitted at April 2017. If it is not permitted, we would need to look to transfer this supplement into the nursery school base rate.
 - Amend nursery school funding to ensure the full value of spend of the DfE's Nursery School Supplement. There are options that will be discussed directly with the Nursery

schools e.g. enhance the lump sum for all 7 schools; enhance the value of the sliding scale protection; establish a cash protection factor; or establish a pot from which to pay for the costs of change.

- o Reduce all of the 3 setting base rates according to the needs of affordability (so that the overall EYB balances for 2017/18) with reference to the expected trajectory of the Government's funding reform. This trajectory is set out below. This means that the reduction to the nursery classes base rate is likely to be lower than schools and PVI providers, because the classes rate is already close to what the universal setting base rate is expected to be at April 2019. The 2017/18 reduction will also need to take account of the additional one off pressure created by the difference between the DfE funding the extended 30 hours at DSG level on a 7/12ths basis for September 2017 to March 2018 and Bradford being required to fund 26 weeks for the same period (26/38ths is greater than 7/12ths).

Question 5 – Do you agree with the proposed approach to funding the 3 and 4 year old free entitlement in 2017/18? If not, please can you explain why not.

Question 6 – Are there any changes that you would like to see made to the Early Years Single Funding Formula in 2017/18 that have not been proposed?

3) Estimated Provider Funding Rates 2017/18 to 2019/20

3.1 The table below sets out our estimate of the changes in rates of funding for providers that will be brought about by the Government's early years funding reforms across the 2017-2019 period, based on the broad proposals set out in this document. These estimates come from analysis of the modelling presented in the Government's consultation. As such, they are very indicative and should be viewed with caution.

3.2 These estimates simple factor the estimated impact of the Government's proposed reduction in Bradford's Early Years Block, the requirement for a universal setting base rate for the 3 and 4 year old entitlement, the restriction of supplements spending to 10% of the total budget, and our response to this. It assumes that Bradford's formula will not include any additional supplements e.g. supporting flexibility in the future and that our deprivation measure will continue to work in the same way and be based on IDACI. It also assumes a continued very low value of central retention within the Early Years Block. The construct of Bradford's future formula is to be reviewed, with proposals anticipated to be published in summer 2017. As such, we would emphasise that providers view these rates with caution. Our rates of funding will also be affected by annual data changes. The new funding stream for Disability Living Allowance has not been included in the analysis below and will be added once confirmed.

ESTIMATED Rate Per Hour	2016/17	2017/18	2018/19	2019/20
2 YO Offer - Universal Base Rate	£4.83	£5.20	£5.20	£5.20
3 & 4 Year Old Entitlement				
Setting Base Rate – Nursery Schools	£5.70	£5.45	£4.12	£4.11
Setting Base Rate – Nursery Classes	£4.13	£4.11	£4.11	£4.11
Setting Base Rate – PVI Providers	£4.62	£4.42	£4.12	£4.11
Mean Deprivation & SEN Rate	£0.68	£0.50	£0.49	£0.47
Nursery Schools Supplement	£1.07	£1.87	£3.16	*
Looked After Children Additional	£1.75			
Early Years Pupil Premium	£0.53	£0.53	£0.53	£0.53

* the continuation of the Nursery Schools Supplement at April 2019 is uncertain

Question 7 – Do you have any comments on these estimated rates of funding?

Question 8 – Do you have any other comments that you have not made elsewhere in your response?

4) Responses to this Consultation and Next Steps

4.1 Please use the responses form attached at the end of this document to submit your views on the proposals outlined in the consultation. There is space on this form for you to comment on any aspect of the proposals. If you wish to discuss these proposals in more detail, or have any specific questions, please contact either Andrew Redding andrew.redding@bradford.gov.uk 01274 432678, Dawn Haigh dawn.haigh@bradford.gov.uk 01274 433775 or Jaclyn McManus jaclyn.mcmanus@bradford.gov.uk 01274 431965

4.2 Please ensure that your response is submitted by the deadline of **Monday 28 November 2016**. Any responses received after this deadline date may not be included in the overall analysis presented to the Schools Forum.

4.3 It is anticipated that the Schools Forum will make its final recommendations on 2017/18 arrangements on Wednesday 11 January 2017. A confirmed Technical Statement, giving sight of the final Early Years Single Funding Formula, and rates of funding, for the 2017/18 financial year will be published very shortly after.

Bradford District Early Years Single Funding Formula 2017/18

(VERSION 1 PUBLISHED FOR CONSULTATION)

INTRODUCTION AND SUMMARY

1) The Basic Early Years Single Funding Formula (EYSFF) for the 3 and 4 year olds free entitlement in 2017/18 is:

$$(a + b) \times c + d = \text{Total EYSFF Funding 2017/18}$$

a) *Setting Base Rate (£ per child per hour)*

b) *Setting Deprivation & SEN Rate (£ per child per hour)*

$$(a + b) = \text{Setting's Total Funding Rate}$$

c) *No. of Free Entitlement Hours delivered at the setting (per year)*

d) *Funding for Sustainability (where applicable)*

For example, assuming that all children at a setting take 15 hours entitlement per week for 38 weeks per year, funding using the EYSFF in 2017/18 will look like:

a) *Setting Base Rate* **£4.11** *** Classes Base Rate*

b) *Setting Deprivation & SEN Rate* **£0.37** *** illustrative only*

$$\text{The setting's funding rate per hour} = (\mathbf{£4.11} + \mathbf{£0.37}) = \mathbf{£4.48}$$

c) *No. of Free Entitlement Hours delivered at the setting (per year) = 39,660 calculated as follows:*

	Children	Hours Delivered	
i Summer Term	78	14,040	(78 x 15 hpw x 12 weeks)
ii Autumn Term	62	13,020	(62 x 15 hpw x 14 weeks)
iii Spring Term	70	12,600	(70 x 15 hpw x 12 weeks)

$$\text{Sub Total EYSFF Funding} = \mathbf{£4.48} \times 39,660 = \mathbf{£177,677}$$

2) The Basic Early Years Single Funding Formula (EYSFF) for the extended 30 hours entitlement for eligible 3 & 4 Year Olds, from September 2017, will operate within the framework that has already been established for the original 15 hours entitlement as this is set out in this Technical Statement.

Timetabling and counting arrangements will be the same. Specific guidance about the funding of the 30 hours entitlement, where necessary, is incorporated into this Statement.

3) The 2 year old free entitlement in 2017/18 will be funded via a simple flat rate per child per hour for all settings. The value of rate for all providers is set at £5.20. Funding will be calculated on a termly count of children, in the same way that participation is calculated for 3 and 4 year olds, but incorporating a 2nd headcount date.

SECTION 1

a) There are 3 'Setting Base Rates' for the 3 and 4 year old free entitlement offer in 2017/18:

Type of Setting	Base Rate Value
Maintained Nursery Schools	£5.45
Maintained Nursery Classes in Primary Schools Nursery Classes in Academies	£4.11
Private, Voluntary & Independent (PVI) Settings, including Childminders	£4.42

- The Base Rates are expressed as values of funding per child per hour. These rates reflect the actual costs of delivery of the free entitlement and that these costs are different for different types of setting. They have been adjusted in 2017/18 for overall affordability pressures. The adjustments are explained in the reports on which the Schools Forum has made its recommendations for the allocation of the Early Years Block in 2017/18; primarily in response to the introduction of the Early Years National Funding Formula and the reduction in the value of DSG funding into the Bradford District.
- All settings of the same type are funded on the same Base Rate.
- The same rates by type of provider are used to fund the original 15 hours entitlement and, from 1 September 2017, the additional 15 hours, up to a maximum of 30 hours per child, for eligible children.
- The Base Rates are fixed at the point the 1st draft of Indicative Budgets are published, which for 2017/18 is in February 2017 (please see the [timetable](#)).
- For Primary schools with Nursery classes, funding allocated to support whole school costs remains fully within the Primary school funding formula (e.g. rates).

b) The value of a setting's 'Deprivation & Special Educational Needs (SEN) Rate' for 3 and 4 year olds is based on the measured level of deprivation of children taking the free entitlement at that setting

- All Local Authorities are required by the Department for Education (DfE) to have a deprivation factor within their EYSFF. This funding is allocated, in addition to the Base Rates, specifically to:
 - Support raising the educational outcomes and life chances of children from more deprived backgrounds
 - Support the reduction of the attainment gap that currently exists between children from more deprived and children from more affluent backgrounds
 - Support settings for the additional costs associated with the delivery of the free entitlement to children from more deprived backgrounds and to children that have additional lower level educational needs (Early Years Action, Early Years Action +).
 - Please note that this funding does not replace the provision and processes in place within the Bradford District to support children with higher level special educational needs.
- As with the Base Rates:
 - A setting's 'Deprivation & SEN Rate' is expressed as a value per child per hour,

- These rates are fixed at the point the 1st draft of Indicative Budgets are published, which for 2017/18 is in February 2017,
 - All hours, including the 30 hours offer from September 2017, delivered at a setting are funded at the same Deprivation and SEN Rate.
- Unlike the Setting Base Rates, Deprivation and SEN Rates vary according to the measured level of deprivation of children attending each setting. Each setting's Deprivation and SEN Rate is calculated using the Index of Multiple Deprivation and the postcodes of children taking up the free entitlement at the setting, recorded in the January 2017, January 2016 and January 2015 censuses (3 year rolling average). Because of the time lag in data, the Local Authority appreciates that using this approach may produce some anomalous funding results, especially for smaller settings. We will keep this approach under review.
 - Rates of funding have been calculated, based on the estimates of funded hours delivered used to calculate the Indicative Budgets, using the Index of Multiple Deprivation (IMD) scores linked to individual children's postcodes. Where this data for an individual setting cannot be properly determined or is not available, and for settings that newly establish during the year, the setting's deprivation rate will be calculated using the average IMD scores for all providers of this type. This is especially applicable for Childminders.

c) Each setting is funded on the number of 3 and 4 year old free entitlement hours recorded as delivered in a single census taken each term

- Each setting's no. of funded free entitlement hours delivered for the 2017/18 financial year is the sum of:
 - Summer term (beginning 1 April 2017): the total of free entitlement hours delivered per week recorded in the census taken on 18 May 2017, x 12 weeks
 - Autumn term (beginning 1 September 2017): the total of free entitlement hours delivered per week recorded in the census taken on 5 October 2017, x 14 weeks. The delivery of the 30 hours entitlement will begin to be recorded from this Census.
 - Spring term (beginning 1 January 2018): the total of free entitlement hours delivered per week recorded in the census taken on 18 January 2018, x 12 weeks. The delivery of the 30 hours entitlement will be recorded in this Census.
- 'Hours delivered' are the free entitlement hours children are registered to take at that setting, taken from the contracts signed with parents for that term. 'Hours delivered' is not affected by the actual attendance of children at the time the censuses are taken.
- The dates for the censuses are the same for both maintained and PVI settings. The dates are those set by the DfE for the maintained termly censuses. One of the reasons for this is so that the census data for each setting can be cross checked to identify duplicate children.
- For maintained schools, the free entitlement hours information will be taken by the Local Authority from the data recorded in the "funded hours" field in the censuses, which schools submit to the DfE via the COLLECT website. PVI settings will be required, as is the process now, to complete a pre-populated form and to return this directly to Bradford Council EYCP via Bradford Schools Online.
- Adjustments will be made to the funding of settings that open or close (or cease to deliver free entitlement hours) mid-term, to reflect the proportion of the term applicable.
- No adjustment will automatically be made to funded free entitlement hours for starters or leavers after the census date in each term. However, exceptional circumstances can be considered where a setting admits a significant number of children after the census has been taken that term. Please see paragraph i below.

- An adjustment to funded hours delivered will be made specifically for the autumn term only, recognising that in this term the intake of children into nursery provision is often staggered into maintained settings and that eligible children may start the term at a PVI setting and then move to a maintained setting before the October census. Where a child started the autumn term at a PVI setting and has moved to a maintained setting prior to the October census, an adjustment will be made to split the funding for the autumn term, based on the number of weeks that a child has attended each setting. This adjustment applies for the autumn term only.
- For the purposes of calculating Indicative Budgets for all settings before the start of the financial year, estimates of the funded free entitlement hours that will be recorded in each of the censuses will be used. Adjustments will then be made in year, where actual numbers are different from these estimates. Please see paragraph e below.
- Please note however, that, as the 30 hours extended entitlement is introduced for the first time from 1 September 2017, the Authority does not have a census database on which to calculate estimates of numbers for the autumn 2016 and spring 2017 terms. The Authority could estimate the numbers for each setting, but using unguided estimates may result in settings, especially, being over funded and being required to repay large amounts. In seeking to avoid this, the numbers of funded 30 hours children will not be included in the calculation of Confirmed Indicative Budgets and will be added into funding on an actual basis as the censuses are collected. The Authority is aware that this may create cashflow issues for PVI settings as funding for the 30 hours would be allocated after the provision has begun. Our funding approach currently includes the provision for PVI settings to request their initial payments for autumn and spring to be adjusted to take account of a more up to date estimate of likely numbers. We would see then that PVI providers should use this provision to ask the Authority to increase payments from the start of the autumn term so that their additional funding for their 30 hours children is allocated in real time. Having now moved to monthly payments for PVI settings also gives flexibility to adjust payments quickly in response to cash flow pressures.
- PVI settings, please note that, due to the very tight timescale for processing information, the count of funded free entitlement hours from the January 2017 census, which will be used to calculate 1st draft Indicative Budgets, will be taken from the census summary each setting provides, rather than from the full census return. If this summary is obviously incomplete or incorrect, the Local Authority will use the count from the January 2016 census. Settings will of course be able to revise the estimates before the Confirmed Indicative Budgets are published. Providers are required to complete the 'Update to Termly Estimates Form' issued by Bradford Council in order to revise the estimates used in the indicative budget. Providers must provide a valid reason for the amendment in order for the revision to be considered and applied.

d) Only children eligible for the 3 and 4 year old free entitlement will be funded

- The EYSFF for 3 and 4 year olds will only allocate funding for children in settings that are accessing the free entitlement from the term after their 3rd birthday. The 1 September, 1 January and 1 April are taken as start dates for each of the terms. The offer has been extended to eligible 2 year olds, but this does not mean all children accessing provision under aged 3 are eligible for EYSFF funding.
- The maximum number of hours any child will be funded for, for the period 1 April to 31 August 2017, is 15 hours per week (for 12 weeks) or the equivalent of this total. This is the same for any child regardless of their age, so a four or five year old child staying in nursery (rather than starting Reception) will only be funded for 15 hours per week, unless funding for the additional 10 hours is specifically agreed with the Local Authority.
- From 1 September 2017, some eligible children will be entitled to 30 hours per week (for 38 weeks per year) and, for these children, 30 hours x 38 is the maximum number of hours that will be funded by the EYSFF. Children that are not eligible for the 30 hours extended entitlement will continue to be entitled to 15 hours per week (38 weeks per year) and the maximum that will be funded is 15 hours x 38. Four or five year old child staying in nursery (rather than starting Reception) will only be funded for 15 hours per week, unless they are eligible for the extended 30 hours or they are continued to be placed at the request of the Local Authority (e.g. children with SEND), where they will be funded for 30 hours.

- Although a child can take up their entitlement over two settings, the maximum entitlement is still the equivalent of either 15 or 30 hours per week over 38 weeks per year. Where a child attends two settings, the Local Authority will fund each setting on a pro-rata basis only up to a maximum of 15 or 30 hours. Where a child attends two settings, the individual settings should ensure they are aware of the free entitlement hours being accessed by that child at another setting; this should help to avoid funding discrepancies regarding duplicate pupils. This may involve discussion with the settings involved where the pro-rata split is not clear from the census returns.
- Maintained schools and academies will only be funded up to the maximum of their published admission number on a termly basis, expressed in hours e.g. a 52 place nursery's maximum number of hours per week will be, assuming the continuation only of the 15 hours entitlement, $52 \times 15 = 780$, so in 2017/18 for the summer term the maximum will be $780 \times 12 \text{ weeks} = 9,360$; for the autumn term $780 \times 14 \text{ weeks} = 10,920$; for the spring term $780 \times 12 \text{ weeks} = 9,360$. These maximums will be adjusted on a termly basis to take account of the actual number of children accessing the 30 hours entitlement e.g. a 52 place nursery, that has 30 children taking to 30 hours, would have a maximum in the autumn term of $(30 \times 30) + (22 \times 15) \times 14 \text{ weeks} = 17,220$.
- Although a child can stretch their entitlement over more than 38 weeks, the Local Authority will fund settings on the basis that all children are taking their entitlement over 38 weeks. It is for the individual setting to then manage funding. To ensure settings are funded correctly, these children should still be recorded in the censuses as accessing 15 hours or 30 hours, where they access an annual total of 570 hours (equivalent to 15 hours \times 38 weeks) or 1,140 hours (equivalent to 30 hours \times 38 weeks).
- Regarding the extended 30 hours entitlement, at this stage, the eligibility checking process and the requirement for the Local Authority to verifying eligibility are proposed in the DfE's draft statutory guidance and supporting documents:

<https://consult.education.gov.uk/early-years-funding/childcare-free-entitlement>

It is proposed by the DfE that:

- Parents will apply online or by phone and will receive a code, this will be a quarterly declaration.
- The parents will give their chosen provider/s the code.
- The provider will do a check on the online checker, which should be available in February 2017.
- The provider will claim the child's hours through the Local Authority's systems
- The Local Authority will then verify the eligibility of the children it is funding with each provider using the Department for Education's Eligibility Checking System.
- DfE 'expect that local authorities will need to check which children are eligible for a place at key points – e.g. at the start, mid-way through and at the end of the term or quarter' parents that are no longer eligible after a check the 'grace period' will kick in for those children who are no longer eligible for the extended entitlement'.

The role of the Local Authority will be to:

- Support providers to understand the online checker process and the claiming process.
- Provide an appropriate system to submit the child's hours to be funded.
- Verify eligibility in line with the DfE proposed requirements.
- Instigate grace period and make changes to payments.

A 30 eligibility and payments Task and Finish Group within the Local Authority will look to the existing systems and what adaptations will be required to facilitate the census recording, verification, and the link to payments and termly adjustments.

e) The Confirmed Indicative Budget published in March 2017 only gives an estimate of funding

- A 1st draft Indicative Budget for 2017/18 for all settings will be published at the end of February 2017. This budget will:

- Show a setting's Base Rate and Deprivation and SEN Funding Rate, which are fixed for 2017/18
- Be calculated on hours at setting information taken from the previous 3 termly censuses i.e. estimating that a setting's numbers to be recorded in the following 3 censuses will be the same as the previous 3 censuses
 - May 2016 for an estimate of the May 2017 census
 - October 2016 for an estimate of the October 2017 census
 - January 2017 for an estimate of the January 2018 census
- As the 30 hours extended entitlement is introduced for the first time from 1 September 2017, the Authority does not have a census database on which to calculate estimates of numbers for the autumn 2016 and spring 2017 terms. The Authority could estimate the numbers for each setting, but using unguided estimates may result in settings, especially, being over funded and being required to repay large amounts. In seeking to avoid this, the numbers of funded 30 hours children will not be included in the calculation of Confirmed Indicative Budgets and will be added into funding on an actual basis as the censuses are collected.
- Settings will then have the opportunity to revise their estimates, should they wish, to incorporate their latest information on admissions for the coming financial year, including anticipated numbers of children taking up the extended 30 hours offer. PVI providers must complete and submit the 'Update to Termly Estimates Form' to inform the LA of the revisions required. This form can be downloaded from Bradford Schools Online.
- A Confirmed Indicative Budget for 2017/18 will then be published in March 2017. This budget will be used to begin payments to maintained schools and PVI providers (see paragraph g below)
- To accompany the Confirmed Indicative Budget, a ready reckoner will be provided by the Local Authority in March 2017 for settings to use to anticipate the value of potential adjustments to funding and to plan their provision and cash flow accordingly.

f) A setting's actual funding will be adjusted from the Confirmed Indicative Budget to reflect differences between estimated and actual free entitlement hours delivered

- Adjustments to funding will be calculated following each of the termly censuses:
 - Please see the [timetable](#) for when adjustments will be published and actioned in 2017/18. These adjustments will alter the amounts of funding physically paid to settings.
 - The adjustments will reflect the differences between the estimated and actual funded hours delivered,
 - A ready reckoner will be provided by the Local Authority, alongside the Confirmed Indicative Budget in March, which settings can use to anticipate these funding adjustments and plan their provision and spending accordingly,
 - A statement of the value of adjustments will be published in advance of the adjustments being actioned. Please see the [timetable](#).
- Additional notes on the calculation of funding adjustments:
 - The value of adjustments is influenced by the accuracy of the estimates of funded hours in the Confirmed Indicative Budgets published in March,
 - These adjustments can be both positive and negative,
 - All adjustments for the 2017/18 financial year will be actioned before 31 March 2018 i.e. in year,
 - Funding adjustments will take account of any sustainability funding; the ready reckoner provided by the Local Authority will incorporate this.
 - Because of the very tight timescale for processing the data after the January 2018 census, the adjustments for the spring term 2018 for PVI settings will be based on the summary information. Where amendments to funding are subsequently identified e.g. for duplicate children, following the processing of the more accurate individual child level census data, these amendments will be incorporated into the adjustments made for the funding for the summer term 2018 following the May 2018 census. Where a setting does not pay back any

money owed to the Local Authority at year end via cheque the value of funding owed will be taken from the setting's summer term payment,

- Where closed or closing settings owe funding to the Local Authority that cannot be recovered through the adjustment of advances the setting will be asked to pay the funding back via cheque.

g) In 2017/18 the way in which funding is physically paid, and the timing of adjustments to payments, will be on a monthly basis for both Maintained & PVI settings

- Maintained schools already have a well-established monthly advances payment system and EYSFF funding will be allocated using this. Schools are already familiar with the way in which these advances are set at the start of the financial year, but are then adjusted to take account of changes in funding (e.g. for statemented SEN) during the course of the year; in June, September, December and March. The adjustments to EYSFF funding will be incorporated into the September 2017, December 2017 and March 2018 advances adjustments. Please see the [timetable](#).
- We moved to monthly payments for PVI providers at April 2016 2016/17. 2017/18 arrangements are the same:
 - Summer Term:
 - Funding from the Confirmed Indicative Budget will be divided by 5 (no. of months in the term) for 5 equal payments to be made between April and July.
 - 2 payments will be made in April, firstly for April and then for May. Payments for the remaining 3 months of summer term will be paid in May, June and July respectively.
 - Any positive or negative adjustment following the re-calculation of funding using May Census actual numbers will be added to or deducted from the July advance.
 - Where the July advance is insufficient to recoup the full value of any negative adjustment, the August advance will also be reduced. Where a negative balance is still outstanding after this, a deduction will be made from September advance.
 - Autumn Term:
 - Funding (either from the Confirmed Indicative Budget or from a revised calculation where the Authority has been notified of a change in numbers) will be divided by 4 (no. of months in the term) for 4 equal payments to be made each month between August and November.
 - The payment for September will be made in August, with payments for the remaining 3 months of the term made in September, October and November.
 - Any positive or negative adjustment following the re-calculation of funding using the October Census actual numbers will be added to or deducted from the November advance.
 - Where the November advance is insufficient to recoup the full value of any negative adjustment, the December advance will also be reduced. Where a negative balance is still outstanding after this, a deduction will be made from the January advance.
 - Spring Term:
 - 80% of spring term's funding (either from the Confirmed Indicative Budget or from a revised calculation where the Authority has been notified of a change in numbers) will be divided by 3 (no. of months in the term) for 3 equal payments to be made each month between December and February.
 - The payment for January will be made in December, with payments for the remaining 2 months of the term made in January and February.
 - Any positive adjustment following the re-calculation of funding using the January Census actual numbers will be paid in a single additional payment at the end of March. This payment will include any funds owed from 20% of the termly amount being withheld from the initial advances calculation.
 - A setting that has still been overpaid, after the 20% that was withheld from the initial calculation has been taken into account, must repay the value of overpayment by cheque by 30 April 2018. Where a cheque is not received by 30 April 2018, the Local Authority will deduct the value of the outstanding overpayment from the next available monthly advance in the summer term. This is likely to be in May 2018.

- Where a PVI setting experiences exceptional cash flow difficulties, they should contact the Local Authority to discuss the matter further. Contact details can be found in Section 3 of this document.
- Monthly payments will incorporate payments for 2 Year Olds, 3 & 4 Year Olds, Early Years Pupil Premium, and any other applicable funding due from Bradford Council to providers.
- Funding of Early Years Pupil Premium will be calculated on a retrospective basis and will be added to monthly advances as a lump sum in September, December and March.
- Settings will receive one single payment each month combining all the funding and grants applicable for that month. A breakdown of the values paid for each section of funding and/or grants will be shown on the advances (payments) update schedules. This will be updated and published on Bradford Schools Online monthly. We strongly recommend providers download this schedule every month.

h) Funding for Children who are Looked After in 2017/18

- Please note that the additional funding for Looked After Children, at £333 per term, has ceased to be allocated from 1 April 2017. This is part of our response to the movement to the Early Years National Funding Formula.
- The Early Years Pupil Premium will continue.

i) Approach to funding Sustainability Issues in 2017/18

- The EYSFF in 2017/18 continues to include a “sustainability” factor, which works on a sliding scale basis to allocate funding specifically to Nursery schools in addition to the funding per children per hour*. This factor ensures that funding allocations continue to reflect specific:
 - Site related costs: buildings and grounds maintenance costs, rates and insurance,
 - Costs relating to supporting Newly Qualified Teachers and safeguard as a result of re-deployment,
 - Fixed type costs incurred by maintained settings in leadership and management and administration and premises staffing.
- We propose to amend nursery school funding to ensure the full value of spend of the DfE’s Nursery School Supplement on Nursery Schools. There are options for this that will be discussed directly with the Nursery schools e.g. enhance the lump sum for all 7 schools; enhance the value of the sliding scale protection; establish a cash protection factor; or establish a pot from which to pay for the costs of change.

* There is uncertainty about whether this supplement will be permitted at April 2017. If it is not permitted, we would need to look to transfer this supplement into the nursery school base rate.

- Both maintained and PVI providers can access dedicated business support, provided by Bradford Council EYCP, for advice on any budget or sustainability issues.
- The Schools Forum has established a process, which is currently used to consider the allocation of additional funding, on a one off basis, to Primary schools facing exceptional cost pressures during the financial year. Requests for funding, submitted by schools, are reviewed on an individual case basis against set criteria. The most common reason for requests is a significant increase in pupil numbers during the financial year, where the school has had to make additional provision, such as setting up a new class. This established process will be used in 2017/18 as the basis on which to consider the allocation of additional funding to any maintained or PVI setting that may face

exceptional cost pressures. A likely common reason for setting's asking for exceptional funding will be where a setting has admitted a significant number of children after the census has been collected for that term. In such cases, exceptional circumstances will always be measured in terms of the level of additional cost pressure faced by the setting in admitting these children, rather than simply measured by the number of additional children not counted in the census.

j) Resourced SEN provision in Early Years settings – Children's Centres Plus

- Resourced SEN provision for 2, 3 and 4 year olds, Children's Centre Plus will be funded through the High Needs Place-Plus mechanism. This means that all funding relating to these resourced provisions is excluded from the operation of the Early Years Single Funding Formula. Settings will not receive EYSFF funding for children placed in resourced provision. Instead settings will receive funding via the High Needs Place-Plus model. *Please note however, that how this funding is allocated is currently being reviewed (this review will determine how much is allocated at the start of the year and / or during the year for the movement of children).*

k) The Early Years Pupil Premium (EYPP) in 2017/18

- Providers will receive up to **£300** per year, or **£0.53** per child per hour, for each eligible child.
- Early Childhood Services have access to the DfE's Eligibility Checking Service which will be used to check whether a child is eligible for the Pupil Premium. Providers will then be funded on a termly basis, along with their main Early Years Single Funding Formula, through the established termly adjustments process. The first allocation of the Early Years Pupil Premium will be from data collected from the May 2017 Census.
- The eligible groups for the Early Years Pupil Premium will be as follows:
 - children from low income families (defined as meeting the criteria for free school meals);
 - children that have been looked after by the local authority for at least one day;
 - children that have been adopted from care; have left care through special guardianship;
 - and children subject to a child arrangement order setting out with whom the child is to live (formerly known as residence orders)
- As with the school-age Pupil Premium, the Government believes providers are best placed to know how to support their disadvantaged pupils with the Early Years Pupil Premium. Restrictions will therefore not be imposed on how providers spend the Early Years Pupil Premium. Instead, Ofsted will hold providers to account for how they've used their Early Years Pupil Premium to support their disadvantaged children through the regular inspection process.
- The DfE's consultation web-page gives further information on the Early Years Pupil Premium:
<https://www.gov.uk/guidance/early-years-pupil-premium-guide-for-local-authorities>

l) Disability Access Funding (New Funding Stream in 2017/18)

- The Government proposes in its consultation to introduce a targeted Disability Access Funding, which would be paid to all providers for each child in receipt of Disability Living Allowance (DLA) taking up a place in their setting.
- We cannot provide firm that this new funding stream will be in place in 2017/18 or provide guidance at this stage on how this funding stream will operate if it is. We will be able to do so in later iterations of this Statement as further details are published. The Government has indicated that:
 - This would be paid to the provider as a total annual sum rather than an increase on the hourly rate.

- To ensure that this new approach is implemented as simply as possible, it would build on the existing model of the Early Years Pupil Premium. This would mean that the Local Authority would receive the additional targeted Disability Access Funding as a ring fenced amount and are then responsible for passing a total amount directly through to providers for each eligible child.
- Once the additional funding is allocated to an early years setting, the provider will be responsible for making decisions about how the funding should be deployed, for example to target one child's specific needs, to improve the setting for a cohort of children or to increase the setting's capacity to take more disabled children.

m) SEN Inclusion (EYIP) funding

- Providers are able to apply for additional funding for support for children with SEND. The resource and requests are managed by the Early Years Inclusion Panel (EYIP). Further guidance on the EYIP can be found [here](#).
- Providers are also able to request support from their area's Equity and Access Officer (please see Bradford Schools Online via the link given in the paragraph above).

SECTION 2

n) The Free Entitlement for Eligible 2 year olds

- Free early education became a statutory entitlement for eligible 2 year olds from 1 September 2013. Eligible children are defined as children who are looked after and children who meet the Free School Meals eligibility criteria. The programme was extended from September 2014 to include around 40% of 2 year olds.
- The EYWG and Schools Forum have previously considered various options to fund the free entitlement for 2 year olds. In 2016/17 these places were funded on a flat rate of £4.83 per hour, with no differentiation for different types of provision. Child numbers were counted and funded in the same way as for 3 / 4 year olds – based on participation recorded at individual settings in the termly censuses, but incorporating a second headcount each term. This second headcount identifies the most vulnerable children that don't arrive neatly at the start of term (especially the autumn term when the census is taken early in October) and also has supported the adequate funding of settings where there has been some slippage in the timescales of capital buildings programmes. The second headcount supports meeting the key outcome, which is to secure sufficient places on a participation-led funding basis.
- This approach is continued in 2017/18 at a single flat rate per hour, **£5.20** for all children. The Funding Regulations only permit a single flat rate to be used to allocate funding for the 2 year old offer.
- The second head count will be taken on the following dates:
 - Summer term: 15 June 2017
 - Autumn term: 2 November 2017
 - Spring Term: 22 February 2018
- The Local Authority now holds a database of delivery numbers. This data will be used to calculate initial 2 Year Old funding allocations as part of the Confirmed Indicative Budget publication process.

SECTION 3

o) Who do I contact?

- The key Local Authority contacts for any queries about the EYSFF are:

Maintained settings: Dawn Haigh, School Funding Team, City of Bradford Metropolitan District Council, 01274 433775, dawn.haigh@bradford.gov.uk

Private, Voluntary & Independent settings: Jaclyn McManus, Early Years Childhood Services, City of Bradford Metropolitan District Council, 01274 431965, jaclyn.mcmanus@bradford.gov.uk

- Key contact details will be included in all correspondence relating to Indicative Budgets and adjustments to funding

Appendix: Bradford District Early Years Single Funding Formula 2017/18 Timetable

Please read this timetable alongside the separate '[Technical Statement](#)', which explains how the Early Years Single Funding Formula (EYSFF) will be applied across the Bradford District for the 2017/18 financial year.

Date	Key Activity
January 2017	<p>a) Department for Education (DfE) January Census 19 January</p>
February 2017	<p>a) 1st draft of Indicative Budgets for 2017/18 Published week commencing 20 February</p> <ul style="list-style-type: none"> • <u>Maintained settings</u> will be able to access these budgets on the Bradford Schools Online (BSO) website. • <u>PVI settings</u> will be able to access these budgets on the Bradford Schools Online (BSO) website. Please note budget information is longer sent by post. • The 1st draft of Indicative Budgets for 2017/18 will be based on each setting's hours delivered recorded in the May 2016, October 2016 and January 2017 censuses i.e. assuming that each setting will be funded for the same number of hours delivered in 2017/18 as in 2016/17. • Settings will then have approximately 3 weeks to review these estimates of funded hours, with the opportunity to change these up or down, prior to the publication of confirmed Indicative Budgets. PVI settings will need to complete the 'Update to Termly Estimates Form' and submit this to the LA. Further details of the checking process will be published with the budgets.
February / March 2017	<p>a) Spring Term 2017 Adjustments Statement Published week commencing 27 February</p> <ul style="list-style-type: none"> • A reconciliation statement for all settings will be published, which will show the differences between estimated and actual spring term funded hours delivered and the value of adjustments due. • <u>Maintained settings</u> and <u>PVI settings</u> will be able to access this statement on the BSO website. <p>b) Confirmed Indicative Budgets for 2017/18 Published week commencing 13 March</p> <ul style="list-style-type: none"> • The Confirmed Indicative Budgets will establish the starting point for funding for the 2017/18 financial year. These budgets will be different from the 1st draft, where settings have asked for their estimates of funded numbers to be altered. Where a setting has not asked for their estimates to be altered, their confirmed Indicative Budget will be the same as their 1st draft. They will not include 30 hours delivery. • The Confirmed Indicative Budgets will be published with a warning that these budgets are subject to change, for differences between estimates of and actual funded hours delivered recorded in the termly censuses. • The Confirmed Indicative Budgets will be published in the same way as the 1st draft Indicative Budgets.

	<ul style="list-style-type: none"> At the same time Confirmed Indicative Budgets are published, the LA will provide a 'ready reckoner', which settings can use to anticipate likely adjustments to funding for actual funded hours delivered. <p>c) Monthly Advances for <u>Maintained and PVI settings</u> amended to incorporate Spring Term 2017 adjustment</p> <ul style="list-style-type: none"> For <u>Maintained settings</u>, the value of LA I01 funding used to calculate the monthly advances will be amended in the final advances update in March 2017 to take account of the adjustment due from the January census. This adjustment will impact on each school's March 2017 carry forward balances position. Schools should use the ready reckoner provided by the LA to ensure that this adjustment is incorporated by schools in their forecast of their year end balances position. For <u>PVI settings</u>, any positive adjustment following the re-calculation of funding using the January Census actual numbers will be paid in a single additional payment. A setting that has been overpaid, must repay the value of overpayment by cheque by 30 April 2017. Where a cheque is not received by 30 April 2017, the Local Authority will deduct the value of the outstanding overpayment from the next available monthly advance in the summer term. This is likely to be in May 2017.
<p>April 2017</p>	<p>a) Calculation and Publication of Monthly Bank Account Advances for 2017/18 for <u>Maintained settings and PVI Providers</u></p> <ul style="list-style-type: none"> For Maintained Primary schools with Nursery classes, Nursery Schools and PVI providers, the Early Years Confirmed Indicative Budget will make up part of the school's Section 251 Budget Statement. Monthly advances for 2017/18 will be calculated from the Section 251 Budget Statements and a schedule & breakdown of payments will be published at the beginning of April. Monthly payments for <u>PVI settings</u> for 2017/18 will begin. Settings should consult advances statement published on Bradford Schools Online at the beginning of April.
<p>May 2017</p>	<p>a) May (Summer Term) Census 18 May 2017</p> <ul style="list-style-type: none"> <u>Maintained settings</u> will submit their termly census to the DfE via COLLECT. <u>PVI settings</u> will submit their census directly to Bradford Council ECS via the Bradford Provider Gateway on Bradford Schools Online (BSO). The Gateway will be open to do this from the beginning of term and will close after headcount day.
<p>June / July 2017</p>	<p>a) Summer Term Adjustments Statement Published week commencing 26 June and payment adjustments PVI settings</p> <ul style="list-style-type: none"> A second head count for 2 year olds will be taken on Thursday 15 June 2017 A reconciliation statement for all settings will be published, which will show the differences between estimated and actual summer term funded hours delivered and the value of adjustments due. The adjustment will be a positive value (meaning that the LA owes the setting more funding), where the number of hours delivered actually recorded in the May census is greater than the estimate used in the confirmed Indicative Budget. The adjustment will be a negative value (meaning the setting must repay funding back to the LA) where the number of hours delivered recorded in the May census is lower than the estimate used in the confirmed Indicative Budget.

	<ul style="list-style-type: none"> • <u>Both Maintained and PVI settings</u> will be able to access this statement on the BSO website. • Adjustments will be made to the July 2017 payment for <u>PVI Settings</u> (both positive and negative) for the recalculation of summer term funding from the May Census. The August payment may also be adjusted, where the value of the July advance is not sufficient to enable full recovery of a negative adjustment.
August 2017	<p>a) Deadline for <u>PVI settings</u> to notify the Local Authority of changes to estimates of autumn term funded hours Monday 7 August</p> <ul style="list-style-type: none"> • Where a PVI setting forecasts that their numbers of hours delivered in the autumn term will be significantly different from the estimate used to calculate the confirmed Indicative Budget, including 30 hours delivery, the LA can make an adjustment to payments from September to reflect this difference. The PVI setting must inform the LA prior to the deadline date by completing and returning the 'Update to Termly Estimates Form'. The LA would not expect to need to make such adjustments for maintained schools.
September 2017	<p>a) Monthly Advances for <u>Maintained settings</u> amended to incorporate Summer Term adjustments</p> <ul style="list-style-type: none"> • For Maintained settings, the value of LA I01 funding used to calculate the monthly advances will be amended in September to take account of the adjustment due for the summer term. • For PVI settings, the September monthly payment will be amended only where, following adjustments to the July and August payments, there is still an outstanding overpayment to recover relating to the summer term.
October 2017	<p>a) October (Autumn Term) Census 5 October 2017</p> <ul style="list-style-type: none"> • <u>Maintained settings</u> will submit their termly census to the DfE via COLLECT. • <u>PVI settings</u> will submit their census directly to Bradford Council ECS via the Bradford Provider Gateway on Bradford Schools Online (BSO). The Gateway will be open to do this from the beginning of term and will close after headcount day.
November 2017	<p>a) Autumn Term Adjustments Statement Published week commencing 13 November and payment adjustments PVI settings</p> <ul style="list-style-type: none"> • A second headcount of 2 year olds will be taken on 2 November 2017. • A reconciliation statement for all settings will be published, which will show the differences between estimated and actual autumn term funded hours delivered and the value of adjustments due. • <u>Maintained settings</u> and <u>PVI settings</u> will be able to access this statement on the BSO website. • Adjustments will be made to the November 2017 payment for <u>PVI Settings</u> (both positive and negative) for the recalculation of autumn term funding from the October Census. The December payment may also be adjusted, where the value of the November advance is not sufficient to enable full recovery of a negative adjustment.

<p>December 2017</p>	<p>a) Monthly Advances for <u>Maintained settings</u> amended to incorporate Autumn Term adjustments</p> <ul style="list-style-type: none"> For <u>Maintained settings</u>, the value of LA I01 funding used to calculate the monthly advances will be amended in December to take account of the adjustment due for the autumn term. <p>b) Deadline for <u>PVI settings</u> to notify the Local Authority of changes to estimates of spring term funded hours Friday 8 December</p> <ul style="list-style-type: none"> Where a <u>PVI setting</u> forecasts that their numbers of hours delivered in the spring term 2018 will be significantly different from the estimate used to calculate the confirmed Indicative Budget, including 30 hours delivery, the LA can make an adjustment to the initial spring term payment to reflect this difference. The setting must notify the LA before the deadline date by completing and returning the 'Update to Termly Estimates Form'. The LA would not expect to need to make such adjustments for maintained schools.
<p>January 2018</p>	<p>a) DfE January (annual) Census 18 January 2018</p> <ul style="list-style-type: none"> <u>Maintained settings</u> will submit their termly census to the DfE via COLLECT. <u>PVI settings</u> will submit their census directly to Bradford Council ECS via the Bradford Provider Gateway on Bradford Provider Gateway on Bradford Schools Online (BSO). The Gateway will be open to do this from the beginning of term and will close after headcount day.
<p>February 2018</p>	<p>a) 1st Draft of Indicative Budgets for 2018/19 Published (see notes for February 2017)</p> <ul style="list-style-type: none"> A second head count of 2 year olds will be taken on Thursday 22 February 2018.
<p>March 2018</p>	<p>a) Spring Term 2018 Adjustments Statement Published week commencing 26 February</p> <ul style="list-style-type: none"> A reconciliation statement for all settings will be published, which will show the differences between estimated and actual spring term funded hours delivered and the value of adjustments due. <u>Maintained settings</u> and <u>PVI settings</u> will be able to access this statement on the BSO website. <p>b) Monthly Advances for <u>Maintained and PVI settings</u> amended to incorporate Spring Term 2018 adjustment</p> <ul style="list-style-type: none"> For <u>Maintained settings</u>, the value of LA I01 funding used to calculate the monthly advances will be amended in the final advances update in March 2018 to take account of the adjustment due from the January census. This adjustment will impact on each school's March 2018 carry forward balances position. Schools should use the ready reckoner provided by the LA to ensure that this adjustment is incorporated by schools in their forecast of their year end balances position. For <u>PVI settings</u>, any positive adjustment following the re-calculation of funding using the January Census actual numbers will be paid in a single additional payment. A setting that has been overpaid, must repay the value of overpayment

	<p>by cheque by 30 April 2018. Where a cheque is not received by 30 April 2018, the Local Authority will deduct the value of the outstanding overpayment from the next available monthly advance in the summer term. This is likely to be in May 2018.</p> <p>c) Confirmed Indicative Budgets for 2018/19 Published for all settings</p>
April 2018	<p>a) Calculation and Publication of Monthly Bank Account Advances for 2018/19 for <u>Maintained and PVI settings</u></p>

The Local Authority has sought to plan this timetable as comprehensively as possible. Please note however, that all dates in this timetable are provisional and subject to change. Where we anticipate that any dates will significantly change, the Local Authority will do its best to notify all providers as soon as possible.

If you have any queries, please contact:

- Maintained settings: Dawn Haigh, 01274 433775 dawn.haigh@bradford.gov.uk
- PVI settings: Jaclyn McManus, 01274 431965, jaclyn.mcmanus@bradford.gov.uk

RESPONSES FORM

Consultation on the Early Years Single Funding Formula 2017/18

Name _____ Setting Name _____

THE DEADLINE FOR RESPONSES TO THIS CONSULTATION IS MONDAY 28 NOVEMBER 2016

Please send completed questionnaire responses to:

School Funding Team
City of Bradford Metropolitan District Council
1st Floor, Britannia House,
Hall Ings
Bradford
BD1 1HX

Tel: 01274 432678

Fax: 01274 435054

Email: andrew.redding@bradford.gov.uk

Please complete the questionnaire by marking the appropriate boxes. There is a space below each question for you to record comments.

Question 1 – Do you agree with the guiding principles? If not, please can you explain why not.

Strongly Agree **On Balance Agree (some reservations)** **Strongly Disagree**

If not, please provide further explanation here:

Question 2 – Do you agree with proposed timetable for implementing early years formula funding change in Bradford across 2017-2019? If not, please can you explain why not.

Strongly Agree **On Balance Agree (some reservations)** **Strongly Disagree**

If not, please provide further explanation here:

Question 3 – Do you agree with the proposal to continue the existing technical, administrative, payment and counting arrangements in 2017/18, and to extend these arrangements to the funding of the extended 30 hours entitlement for 3 and 4 years olds? If not, please can you explain why not.

Strongly Agree **On Balance Agree (some reservations)** **Strongly Disagree**

If not, please provide further explanation here:

Question 4 – Do you agree with the proposed approach to funding the 2 year old free entitlement in 2017/18? If not, please can you explain why not.

Strongly Agree **On Balance Agree (some reservations)** **Strongly Disagree**

If not, please provide further explanation here:

Question 5 – Do you agree with the proposed approach to funding the 3 and 4 year old free entitlement in 2017/18? If not, please can you explain why not.

	Strongly Agree	On Balance Agree	Strongly Disagree
Continue with 3 Setting Base Rates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Continue the current Deprivation Rate formula	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reduce Deprivation spending to 10% (from 13.2%)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cease the separate Looked After Children Factor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transfer the Nursery School Catering Supplement into the Nursery School Base Rate / Deprivation Rate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Continue the Nursery School Sustainability Factor, bringing the 30 hours into the calculation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Amend the Nursery School Sustainability Factor so that the full value of the DfE's Supplement is spent on Nursery Schools

Reduce provider base rates to balance the EYB in 2017/18 in line with the expected trajectory of the DfE's national funding formula

If not, please provide further explanation here:

Question 6 – Are there any changes that you would like to see made to the Early Years Single Funding Formula in 2017/18 that have not been proposed?

Question 7 – Do you have any comments on the estimated rates of funding?

Question 8 – Do you have any other comments that you have not made elsewhere in your response?

A large, empty rectangular box with a thin blue border, intended for the user to provide additional comments or responses to the question above.

SCHOOLS FORUM AGENDA ITEM

For Action



For Information



Brief Description of Item (including the purpose / reason for presenting this for consideration by the Forum)

This report asks Members to agree the publication of the proposed consultation document on the High Needs Block funding model for 2017/18. This includes first sight of the estimated minimum number of places the Authority expects to commission and the arrangements for paying top up (Plus Element) funding.

Date (s) of any Previous Discussion at the Forum

The Forum considered the consultation on the 2016/17 high needs funding model on 21 October 2015 and set the High Needs Block budget in January 2016. High needs funding is regularly discussed by Members.

Background / Context

Please see Appendix 1 (the proposed consultation document itself) for the background to the proposals for the 2017/18 funding model.

This report, and the consultation appendix, focuses on High Needs Block technical and formula structure matters; how delegated budgets for individual providers are calculated and allocated in the 2017/18 financial.

Members are reminded that the DfE has announced that 2017/18 is a 'stand-still' year and no major technical changes are being made to the funding framework in so far as this affects high needs providers. The Minimum Funding Guarantee, including for special school funding, is set again at minus 1.5%.

Members are also reminded that size and continuing growth of the cost pressure within the High Needs Block is one of key issues the Forum must manage. The High Needs Block continues to be under significant financial pressure; overspending in 2016/17 in total by £5.6m (10%) against the notional DSG budget allocated by the DfE. This is largely the result of demographic stresses, which will continue for a number of years. This overspending is met currently through contributions from the Schools and Early Years Blocks within the DSG. The Schools Forum received a presentation on 18 May 2016, which explained that a further 360 specialist places are needed by September 2018 (at roughly 120 per year in each of the next 3 years) simply to meet forecasted demographic growth. The annual cost of 120 places (at an average of £21,000 per place) is roughly £2.52m. At its meeting on 21 September, the Forum agreed to the funding of the first 120 places from January 2017. The Schools Forum has also been made aware of a significant growth in cost of out of authority, independent and non maintained school placements and in other aspects of high needs provision, including medical-need home tuition. Planning on this basis, indicatively, increases the cost of high needs provision by £5.43m in 2017/18 i.e. the overspending in 2017/18 increases from £5.6m to £11.03m.

Details of the Item for Consideration

Please see Appendix 1, which is the draft of the consultation paper on proposals for the funding of High Needs provision in 2017/18. This document also includes information on how the funding system works and other issues, including cost pressures and a comparison of our top up funding against other authorities. The document proposes continuity in 2017/18.

An indicative view of the minimum number of places estimated to be funded in Bradford-located settings is given in paragraph 5.

The proposals for change for 2017/18 are discussed in paragraph 6. Members are asked to consider the document and agree for this to be published. The outcomes of the consultation will be presented to the Forum in December and Members will be asked to make final recommendations on the funding model at this point.

Implications for the Dedicated Schools Grant (DSG) (if any)

Yes – as referred to in Appendix 1.

How does this item support the achievement of the District's Education Priorities

Ensuring appropriate resources are available, in the right places, to support the most vulnerable children across the District, must be a key focus for the Forum, building on current good practices. It is also vitally important that, alongside managing increasing cost pressures, that sufficient resources are available to the Local Authority and to schools to meet statutory responsibilities around SEND and meeting pupil need.

Recommendations

The Forum is asked to agree to the publication of the proposed consultation on the High Needs Block funding model for 2017/18.

List of Supporting Appendices / Papers (where applicable)

Appendix 1 - Consultation on Funding High Needs Provision 2017/18

Contact Officer (name, telephone number and email address)

Andrew Redding, Business Advisor (Schools)
01274 432678
andrew.redding@bradford.gov.uk

Document GQ Appendix 1

INFORMATION AND CONSULTATION ON FUNDING HIGH NEEDS PROVISION 2017/18 FINANCIAL YEAR

1. Introduction and Summary

1.1 The primary purpose of this information and consultation document is to collect views so that agreement can be reached on the structure of our High Needs Block funding approach (our Place-Plus system) for the 2017/18 financial year i.e. how Bradford Council calculates and allocates funding that is delegated to providers.

1.2 Information is also presented on the issue of cost pressures and a warning is given about possible reductions in Top Up funding rates (the Plus element). The main priority for the 2017/18 financial year is for us to identify sufficient funding to significantly increase the quantity of specialist places available and to meet additional areas of immediate pressure. The Schools Forum will be considering again the rates of funding applied through our Ranges Model. Providers will be aware that values of the Plus elements (the top up above the £10,000) in our Ranges Model were reduced in this current year by 0.42% as part of a blanket reduction across all 3 Blocks to achieve a balanced DSG. This 0.42% reduction was also applied to the non-delegated / centrally managed High Needs Block budgets. In addition, the budget for supporting the cost of specialist equipment in special schools was reduced by 50% (to £37,500).

1.3 Providers can use their responses to this consultation to set out their views on rates of funding for the 2017/18 financial year. Providers are also encouraged to keep track of the School Forum's discussions on DSG cost pressures as these progress over the autumn term. It is expected that the Schools Forum will make its final recommendations on rates of funding at its meeting on 11 January 2017.

1.4 The deadline for responses to this consultation is **Monday 28 November 2016**. Please address all questions and responses to Andrew Redding 01274 432678 andrew.redding@bradford.gov.uk. A response form is included at Appendix 2.

1.5 By way of a re-cap of where we are, significant changes to the way 'High Needs' provision is funded were required to be implemented by the Department for Education (DfE) for the 2013/14 financial year. These changes affected activities funded by the High Needs Block, which is a specific block within the Dedicated Schools Grant (the DSG) that amounts to about 10% of the overall DSG resources available to the Local Authority funding:

- Children with Statements in all mainstream settings
- Special Schools, Academies and Free Schools
- Resourced Units attached to mainstream schools, academies and Free Schools
- Pupil Referral Units (PRUs)
- Behaviour Centres
- Behaviour & Attendance Collaboratives (the BACS)
- Provision for students aged post 16 in Further Education (FE) settings
- Services for high needs children that are managed centrally by the Local Authority
- Education in Hospital provision
- Children placed in out of authority and non-maintained settings

1.6 This funding approach is based on the financial definition of a 'High Needs' student being one whose education (incorporating all additional support) costs more than £10,000 per annum. This threshold lays the foundation of the national 'Place Plus' framework and the basis of the definition of the financial responsibility that maintained schools, academies and other settings have for meeting the needs of children from their delegated budgets.

1.7 Bradford Local Authority's response to these changes has been as follows:

- Our consultation document, published in autumn term 2012, outlined the major changes brought about by the new system and explained the proposals for our approach to High Needs funding for the 2013/14 financial year. Our approach was agreed by the Schools Forum in January 2013. At the centre of our approach is the application of a uniform banding model containing 7 'ranges' of need, with 7 bands of funding (referred to in this document as our 'Ranges Model').
- In March 2013, the Schools Forum agreed a series of reviews, 8 of which related to items from the High Needs Block. Our consultation document, published in autumn 2013, proposed mostly incremental changes and resolved some outstanding issues, including:
 - The funding of high needs provisions via our full Ranges Model / Place-Plus Framework, including ARCs, Early Years Children's Centre Plus, Primary Behaviour Centres and the PRUs
 - The continuation of the cash budget protection factor, which helps guard settings against unexpected monthly budget fluctuations.
 - Improvements in the processes for the identification and moderation of pupil-need, so that information about Ranges is more accessible and so that the system is more responsive to in year changes.
 - Additional setting-based factors for the PRUs (split sites, rates and churn factors).
 - An increase in the value of the SEN Funding Floor for students with statements / EH&CPs in mainstream schools.

The Schools Forum agreed our 2014/15 funding model in January 2014.

- In March 2014, the Schools Forum again agreed a number of reviews relating to the High Needs Block, which were completed to inform decisions for the 2015/16 financial year. The Schools Forum agreed our 2015/16 model in January 2015, which included only incremental changes on 2014/15, some of which were changes directed by the DfE:
 - Following the DfE's direction - the value of an alternative provision place was increased from £8,000 to £10,000, with a corresponding decrease of £2,000 per place made to each setting's Plus element, so that this change was impact neutral.
 - Following the DfE's direction - Post 16 places were changed to be funded on the basis of the location of the setting rather than who commissions the place, bringing this in line with pre-16.
 - Early Years Children's Centre Plus - the total planned DSG budget allocated to this provision was adjusted to remove the previous double funding within the £6,000 place-led element per FTE place.
 - Alternative Provision – a change to calculate the Plus element for all students without a statement on a formula of 50% Range 4D and 50% Range 5.
 - SEN Funding Floor Primary schools and academies – the value of the SEN Funding Floor for primary schools and academies was increased. The SEN Funding Floor is a protection mechanism that ensures that all schools / academies receive a minimum amount of SEN funding.
 - Cash Budget Protection Factor – the cash budget protection factor for special schools and DSPs was continued, but with the eligibility for this factor based on criteria, so that protection is not continued in settings that are more permanently reducing their pupil numbers.
 - Exceptional circumstances / financial difficulties – a more formal Exceptional Circumstances / Financial Difficulty mechanism within the High Needs Funding Model was adopted, in line with that of mainstream provision.
 - The Schools Forum agreed an initial step towards the funding of post 16 high needs students in Further Education (FE) settings on a formula-basis for the 2014/15 academic year.
 - The Authority's Control of Excess Surplus Balances mechanism was adjusted to provide a greater amount of flexibility for stand-alone maintained high needs providers in managing the possible negative impact of in year changes in pupil population.
- The Schools Forum agreed our 2016/17 financial year funding model in January 2016, which again included only incremental structural changes largely driven by affordability pressures within the High Needs Block, but also clarifying the arrangement for the funding of additional in year places and further developing the funding approach for high needs students in Further Education settings:
 - The Bradford-Specific Minimum Funding Guarantee factor for Special Schools and Academies and DSPs was removed.

- It was agreed that the funding of in year additional places be allocated in real time during the year and for an end of year reconciliation to be actioned, which will mean that a setting's place funding will be reduced (negative adjustment) if the setting has been allocated too much additional places funding for its annual composite occupancy.
- For the funding of post 16 high needs students in the Further Education sector, it was agreed with the relevant providers that, as, on average, colleges deliver around 60% of the hours delivered by schools, colleges are funded for the vast majority of students at 60% of the Ranges Model value for the primary need of the student. The exceptions are students with the primary need of sensory impairment (Hearing / Visual), where funding will continue to be allocated on an actual cost basis. Due to the specific support needs of these students in Further Education, and the diverse nature of their curriculum choices, it is not possible to formularise this funding element. This approach brings the basis of funding of the Further Education and Maintained sectors closer together and provides greater transparency. It also allows for more accurate budget planning, both for colleges and for the Authority.

1.8 The DfE is currently consulting on the move to National Funding Formula (NFF) arrangements across the Dedicated Schools Grant. A NFF is likely to have significant consequences for all aspects of local education and school funding and this is currently clearly on the radar of the Schools Forum and its working groups. The Schools Forum has a specific SEN Reference Group, which is made up of representatives across the high needs sector in Bradford. We expect NFF changes to begin, for the Schools and High Needs Blocks, from April 2018. At point of writing this consultation paper the DfE's 2nd stage of consultation, which the DfE indicated would be available in autumn 2016, has not yet been published. The key proposals relating to the High Needs Block that have been put forward by the DfE so far are:

- The NFF proposals do not introduce a provider-level national formula for HNB funded providers. Local authorities will continue to have responsibility for the management / formula funding of High Needs Block (HNB) provisions. The distribution of HNB local authority level funding is to be formularised using proxy measures, with an expected extended timescale of transition to new funding levels. In the first 5 years at least, it is proposed that current spending will more dictate levels of HNB funding for each local authority than the new formula. There are some more technical proposals for HNB funding arrangements (which are still being worked through and much detail still to be announced). The DfE understands that local authorities may need to re-shape their HNB provisions (including developing more places) and proposes to make monies available during the transition period, including capital monies, to enable authorities to do this.
- The DfE expects much closer collaboration between local authorities in funding arrangements and in commissioning provision. The DfE also expects that local authorities will consider the organisation of their alternative provisions and how these are funded.
- The DfE sees the importance of local authorities (and high needs providers) finding significant efficiencies in their HNB provisions, including collaborative arrangements, but also using reserves within the DSG to support initial pressures and transition and accessing the capital support, which will be made available to reshape and increase places.
- The Schools Block is to be ring-fenced, so that this must be spent on primary and secondary formulae funding and cannot be diverted to support pressures in other Blocks i.e. the High Needs Block.
- The DfE is considering options for the review of alternative provision, to "make AP more rigorous" and will publish plans on this. This may affect how the different kinds of AP are funded.
- No formula solution has been put forward yet for the funding of Education in Hospital provision (still based on current levels of spending).
- Continuation of the Place-Plus system; "not much change is planned" in this apart from some technical adjustments. Therefore, we assume the continuation of the basics; place funding set on an annual basis via a formal process, top up monthly re-calculation etc. A minor technical simplification of the place funding of resourced provisions attached to mainstream settings is proposed (how the first £4,000 element is calculated). It is also proposed to give independent schools the opportunity to move onto the Place-Plus framework and to adopt more common arrangements between pre and post 16 mechanisms.
- Local authorities will continue to be able to spend HNB resource outside the Place-Plus framework (e.g. devolving monies for specialist services) and to support inclusion.

1.9 We now do not expect the 2nd stage consultation on NFF to affect directly the position for the 2017/18 financial year. The DfE has announced that 2017/18 is a 'stand-still' year and no major technical changes are being made to the funding framework in so far as these affects delegated high needs funding at provider level. No change means that we continue to have complete flexibility locally in how we define and fund levels of need. The Minimum Funding Guarantee in 2017/18, for special school funding, is set again at minus 1.5%.

1.10 In the face of future uncertainty, the Forum, previously, has sought to provide stability by generally maintaining the status quo in formula funding arrangements, based on our assessment that the structures of our formulae continue to be fit for purpose. These structures however, must work within the overall DSG funding envelope and must respond to changes in Regulations where directed.

1.11 We propose therefore, as set out in this consultation document, to make only targeted adjustments to Bradford's Place-Plus system for the 2017/18 financial year, with the purposes of:

- Supporting value for money within our High Needs Block by setting a correct balance between providing stability through budget protections for individual settings whilst avoiding 'locking in' an incorrect distribution of funding for an extended period of time.
- Ensuring that our Place-Plus system responds to appropriately fund the changing nature of provision, including that offered by our resourced units attached to mainstream schools and academies.

1.12 Providers will be aware that the Government has set out its plans for significant reform of Alternative Provision. This reform is likely to affect commissioning responsibilities and, from this, financial responsibilities and the processes by which allocations for placements are calculated and how money flows between schools, providers and the Local Authority. For example, where the host school takes more responsibility for commissioning places in alternative provision, including for permanently excluded pupils, it will be the host school's delegated budget that will meet the cost of the Plus element and the host school will have the direct financial relationship with the provider. Therefore, the funding to enable this commissioning should rest in schools (in the Schools Block) rather than in the High Needs Block / with the Local Authority. This may mean that a District-wide 'Funding Ranges' model, controlled by the Local Authority, becomes less prominent for the calculation of the cost of placements. There may also develop a much clearer delineation of funding responsibilities, with the High Needs Block solely funding provision for young people with SEND Statements or EHCPs. These policy reforms are likely to take shape at the same time as the National Funding Formula is implemented. The financial framework for Alternative Provision, and the relative responsibilities of school delegated budgets and the High Needs Block will be affected by both these changes.

2. High Needs Block Rates Comparisons, Cost Pressures (and Sustainability)

2.1 The values of formula factors quoted in this document e.g. the values of 'Plus' funding by Range shown in Appendix 1, are indicative only for 2017/18. In particular, these values will be subject to the School Forum's management of costs pressures within the DSG.

2.2 The Authority's benchmarking of Top up (Plus element) rates against other authorities shows that our 2016/17 rates can be said, at the very least, to be comparable for both SEN and Alternative Provisions. Accepting the limitations of the data taken from Section 251 Planned Budget returns, and that this makes no reference to differences in levels of need between authorities or in how provision is delivered or the nature of PRU provision, this data indicates that our top up rates per place (this is the total of funding allocated in addition to the nationally set place-element) compare as follows:

	Bradford	National Median	Statistical Neighbour Median
SEN Places	£10,531	£10,485	£10,564
Alternative Provision Places – All our PRUs *	£9,970	£7,713	£6,021
Alternative Provisions Places – our turn-around PRUs only	x3 settings: £7,316, £8,029 and £9,704	£7,713	£6,021

* we have PRUs that act more like special schools, so we would expect their funding rates to be higher, assuming that the PRUs in other authorities are only for turn-around provision. This is not as robust a comparison as that for special schools.

2.3 The High Needs Block continues to be under significant financial pressure; overspending in 2016/17 in total by £5.6m (10%) against the notional DSG budget allocated by the DfE. This is largely the result of demographic stresses, which will continue for a number of years. This overspending is met currently through contributions from the Schools and Early Years Blocks within the DSG.

2.4 The Schools Forum received a presentation on 18 May 2016, which explained that a further 360 specialist places are needed by September 2018 (at roughly 120 per year in each of the next 3 years) simply to meet forecasted demographic growth. The annual cost of 120 places (at an average of £21,000 per place) is roughly £2.52m. At its meeting on 21 September, the Forum agreed to the funding of the first 120 places from January 2017. The Schools Forum has also been made aware of a significant growth in cost of out of authority, independent and non maintained school placements and in other aspects of high needs provision, including medical-need home tuition. Planning on this basis, indicatively, increases the cost of high needs provision by £5.43m in 2017/18 i.e. the overspending in 2017/18 increases from £5.6m to £11.03m.

2.5 Currently, these pressures will only be met by taking sizeable contributions from the Schools and Early Years Blocks, effectively by reducing the rates of formulae funding for primary and secondary schools and academies and early years providers. What a 1.5% reduction on formula funding looks like indicatively for primary and secondary schools and academies in 2017/18 is shown in the separately published Schools Block consultation paper. What a 1.5% reduction in the values allocated by our Ranges Model looks like indicatively is shown in the table in paragraph 4.8.

2.6 The Local Authority, with the SEN Reference Group and the Schools Forum, is reviewing this position, from the perspectives of both financial pressures and the sufficiency of places. The longer-term pressure must be viewed in the context of the impact of the National Funding Formula in the future. Our view of this will be shaped as further details of the National Funding Formula are announced.

2.7 As outlined in paragraph 5, the Authority's indicative 2017/18 DSG planned budget currently assumes / estimates the need for the following places:

- For individual settings, the greater of either actual occupancy at October 2016 or the 2016/17 planned places total, with some adjustments to individual settings for known specific changes and planned increases.
- Further provision, not yet allocated to individual settings, of 120 places for the full financial year (continuing those introduced at January 2017) plus a further 120 places at September 2017 (with 7/12ths of the cost in 2017/18). These places will be available to allocate across different provisions, including out of authority settings and placements in independent and non maintained schools.

2.8 The Authority will continue to firm up places forecasts over the autumn term and will talk to providers, prior to agreeing the DSG's provision with the Schools Forum for 2017/18 on 11 January 2017. There is some work that still needs to be done here, including confirming the forecasted need for places in the Further Education Sector. Further discussions are also taken place about the sufficiency of places for SEMH.

3. Reminder of the Key Characteristics of the 'Place-Plus' Framework

3.1 Under 'Place-Plus', delegated budgets in 2017/18 will be constructed in 2 parts:

The Place Element - the value of the 'Place' element is set at

- £10,000 per place for specialist SEN settings (pre and post 16) and for specialist Alternative Provision settings (including Pupil Referral Units)
- £10,000 per pre 16 place and £11,165 per post 16 place for resourced provisions attached to mainstream settings

These values are set nationally by the DfE. The number of places per setting will be set with the Local Authority before the start of the 2017/18 financial year.

The £10,000 / £11,165 values are made up of:

- Element 1: a basic £4,000 (for £10,000 places), £5,165 (for £11,165 places), which is the funding that all pupils attract within formula funding,
- Element 2: an additional £6,000 for additional needs, which in the mainstream primary and secondary funding formula is allocated within already delegated budgets, calculated on measures of additional need such as Free School Meals, IDACI and low attainment.

The Plus Element – Element 3 - the Top Up, above the value of the Place element, which is allocated on an individual pupil basis. This will be calculated on an assessment of the additional needs of individual pupils (we use our 7 Ranges Model – see Appendix 1) and allocations will be re-calculated, on a monthly basis, to take account of the movement of children. The Plus element is the only vehicle through which differences in costs associated with settings (rather than pupils) can also be recognised e.g. split sites, smaller settings. It is for local authorities, in consultation with their providers, to set the values of their Plus elements. Plus elements will be paid to settings by the commissioning authority, which in most instances is the Local Authority.

3.2 Other key characteristics of ‘Place-Plus’ are:

- For academies and other non-maintained providers, including Further Education settings, the Place element will be allocated directly by the Education Funding Agency, rather than by the Local Authority.
- Specific stand-alone maintained high needs providers i.e. Special schools and PRUs, are not able to access de-delegated or centrally managed funds within the DSG in the way that they did prior to 1 April 2013. This means that, in areas such as maternity cover for employees and trade union facilities time, settings must either purchase services, where possible, from the Local Authority, or make their own arrangements, with the cost falling to their delegated budgets.
- A basic Minimum Funding Guarantee is still required in 2017/18 for special schools, to protect an individual school’s Plus allocation against reductions of more than 1.5% per pupil. This MFG is not a requirement in other phases e.g. alternative provision or resourced units.
- Local authorities are permitted to continue to separately fund additional outreach and support services that may be managed centrally or may be devolved to providers under service level agreements. It has been specifically recognised by the DfE that this sort of separate approach may be required to provide effective support services for children aged 0-19 with low incidence sensory impaired requiring high levels of specialist support in mainstream settings.
- Place-Plus contains sufficient flexibility for local authorities to continue current strategies and to ensure that individual settings do not face unmanageable budget pressures.

4. **Reminder of our funding approach in this current financial year**

4.1 A helpful way to outline the basics of our approach is to explain the funding model for Special schools in this current financial year, as this has laid the foundations of the funding of all high needs provision.

Identification and Moderation of Pupil Need

4.2 As the majority of placements are commissioned by the Local Authority, the process for placing children into the 7 Ranges framework is led by the Local Authority, using the primary need data that is held by the Authority and the descriptors of need that have been agreed by school colleagues and applied for the funding of Special schools for a number of years.

4.3 The Local Authority reviews existing pupil populations and discusses the outcomes of this with each setting. Assessment places are funded at Range 4D.

4.4 The processes for managing in year changes, and for the placement of pupils newly statemented, are also led by the Local Authority. The Authority tracks the movement of children between settings and re-calculates funding on a monthly basis. SEN Services provides to each setting a list of pupils on roll and their funding range by the 5th day of each month. Any discrepancies in that month’s data are resolved at this point,

before the 10th of the month deadline. Newly statemented children are placed into one of the 7 Ranges by the Authority using primary need data. Children initially placed at Range 4D are re-categorised following assessment and settings are notified of this. Settings are also notified of the proposed funding range of a child at the point of consultation on placement. Schools are able to refer to the monthly funding statements to check changes and the funding position of newly admitted pupils

4.5 Adjustments to reflect changes in the needs of individual children, where an issue has been raised by a setting, are referred to the SEN Strategy Manager / Assessment Manager. If agreement is not reached, the SEN Panel is asked to make a final decision. Where changes are agreed with the Authority, funding is updated from the next applicable month.

Funding Pupil-Based Need – the 7 Ranges Model

4.6 The agreed 7 Ranges Model, shown at Appendix 1, is used to assign pupils into categories of need for funding purposes. Each range has an applicable level of funding, and every pupil assigned to a range is allocated the set value of funding, regardless of setting. This model has been applied in the same way to both pre and post 16 students.

4.7 The Local Authority’s intention has been to establish a single uniform framework for calculating ‘Plus’ funding. The Authority’s expectation is that this framework will categorise the vast majority of pupils and will thus ensure consistency in the approach to the funding of high needs in mainstream and specialist settings. It is accepted that there will be a small number of children or young people that will sit outside the Ranges framework; most of whom will be placed in specialist independent provisions.

4.8 The values of funding per pupil set for each range in 2016/17 are set out below, along with an indication of what a 1.5% reduction in these rates would look like.

Range	Plus Funding (annual value) 2016/17	Indicative Value of a 1.5% Reduction
Range 1	£0	n/a
Range 2	£0	n/a
Range 3	£0	n/a
Range 4A	£981	- £15
Range 4B	£3,092	- £46
Range 4C	£4,738	- £71
Range 4D	£7,380	- £111
Range 5	£10,761	- £161
Range 6	£14,337	- £215
Range 7	£23,558	- £353

4.9 For example then, for a child assessed at Range 7 in a Special school or academy receives £10,000 Place funding and an additional £23,558 Plus funding; a total of £33,558 for a full year. Where a child is placed at a setting during the year, the setting receives the Plus value for the proportion of the year the pupil is on roll.

Funding Setting-Based Need

4.10 The following setting based needs factors are included in the calculation of Plus funding in 2016/17. These are allocated in addition to the values of pupil-based need funding shown in the table above.

- New Delegation Costs – an additional amount per pupil to reflect that stand alone specialist settings under Place Plus cannot access de-delegated and centrally managed services and this may create additional budget pressure - set at a flat £364 per pupil. So a setting with 100 pupils receives 100 x £364 = £36,400 additional funding.
- Small Setting Protection – an additional sum, for stand-alone settings with fewer than 75 places, to ensure a minimum level of funding for fixed costs. The formula in 2016/17 is:
A (75 x £10,000 x 20%)

B (setting's place funding x 20%)
= top up to the value of A where B is less than A

- Split Sites – an additional agreed sum to replicate 2014/15 values for schools that continue to operate across split sites (£162,850 for a full year allocation).
- Post 16 Places – an additional sum per Post 16 place, to continue the additional £1,165 per Post 16 place following the directed reduction from £11,165 to £10,000 place value within the national funding model from August 2014. This ensures that special schools with post 16 places do not lose out from the technical simplification. This is a factor specific only to special schools.
- 2015/16 Budget Protection – an additional total cash budget protection, for eligible settings only, which ensures that at no point during 2016/17 will the total 'Place Plus' calculated budget for an individual setting be more than 1.5% lower than the 2015/16 total level of funding (taking account of the income received for placements by other local authorities).

In Year Re-Calculation

4.11 The value of Plus funding is re-determined on a monthly basis for the movement of children. This re-calculation is based on the position recorded at the 10th of each month. Where a child is admitted after the 10th, funding begins from the next month.

4.12 For any errors in the data for a single month, or where the position has been estimated due to the most up to date data not being available (at September, picking up all changes for the new academic year), retrospective adjustments are made in the subsequent month's calculation.

4.13 Funding for August repeats the position recorded for July.

4.14 A ready reckoner is available, which helps settings predict the impact on funding of movements in pupil numbers / ranges on a monthly basis.

4.15 The funding of additional place-element, where a setting's number on roll exceeds the number of places set before the start of the financial year, is allocated in real time during the year. An end of year reconciliation is actioned, which means that a setting's place funding will be reduced (a negative adjustment) if the setting has been allocated too much additional places funding for its annual composite occupancy.

The Application of this Approach for the funding of other High Needs Providers

4.16 The approach outlined in paragraphs 4.2 to 4.15 is used to calculate allocations for SEN Resourced Provisions attached to mainstream primary and secondary settings, with the following differences:

- Designated Specialist Provision (DSPs):
 - Of the setting based need factors listed in paragraph 4.10, only 2015/16 budget protection factors are applied. The other factors are not applied, because DSPs are not stand alone units and because Post 16 places continue to be funded at the original value of £11,165 within the national model.
- Additional Resourced Centres (ARCs – support for hearing and visually impaired pupils):
 - The funding model is applied to ARCs in the same way as for the DSPs above, with four differences. Firstly, all children placed in the ARCs are funded at Range 5. Secondly, as ARC provision is managed by the Local Authority, the monthly calculated 'Plus' element is retained by the Authority, plus the settings pay back to the Authority £6,000 of the £10,000 for each funded place on a full year basis. Thirdly, the New Delegated Costs factor is applied, as the Authority cannot access the de-delegated arrangements that resources provisions attached to maintained schools can. Fourthly, the 2015/16 Budget Protection Factor is not applied, to enable the repayment of place-led funding.

4.17 The approach outlined in paragraphs 4.2 to 4.15 is used to calculate allocations for placements in Pupil Referral Units, with the following differences:

- The value of the Place element has now been set, by the DfE, at £10,000, but previously was set at £8,000. As a consequence, the Small Setting Protection factor is calculated on the £8,000 per place value and an additional setting factor is included, which removes the £2,000 additional funding per place, so that the impact of the DfE's directed change to £10,000 is neutral. However, this adjustment is not applied to Primary PRU, to recognise that, although a PRU in name, this setting acts as a special school and has a similar cost structure.
- The Place element for the District PRU has been added to the Plus element and allocated flexibly on a monthly basis following the actual placement of pupils.
- For Central PRU, recognising the short term intensive nature of placements, rather than following the moderation processes, which are more suited to determining needs over the longer term, we have used a 'formulaic' basis to placing pupils into the Ranges model; placing 50% of pupils on roll in Range 4D and 50% in Range 5 on a monthly basis.
- This method is extended to calculate the Plus element for all non-statemented students in other PRUs settings. These students are funded on a formula of 50% Range 4D and 50% Range 5.
- Of the setting based need factors listed in paragraph 4.10, only the New Delegation Costs and Small Setting Protection are employed. A separate (different) split site factor has been used. Please see below.
- The following additional setting based need factors are included in the funding model for the PRUs:
 - A split sites factor, which recognises where provision is delivered across sites that are geographically separated. For qualifying settings, we have doubled the value of the small setting protection, to recognise the duplication in running costs of a separate site (s).
 - A 'Churn' factor, for settings that delivery short term provision, to recognise additional pressures that relate to the continuous movement of children. For qualifying settings, we calculate funding on a monthly basis as follows: the mobility variable (taken from the secondary mainstream formula) x5 (this is a standard weighting for high needs provision) x number of pupils on roll.
 - A 'Rates' factor, for all settings. As special schools do not pay rates, our basic funding model does not include any provision for the cost of rates. However, PRUs are liable for rates charges.

4.18 The approach outlined in paragraphs 4.2 to 4.15 has been used to calculate allocations for placements in the Primary Behaviour Centres, with the following differences:

- The value of the Place element has now been set, by the DfE, at £10,000, but previously was set at £8,000. As a consequence, an additional setting factor is included, which removes the £2,000 additional funding per place, so that the impact of the DfE's directed change to £10,000 is neutral. This adjustment is not applied to the 5 SEN places at the Phoenix Centre.
- For SEN placements (at Phoenix Centre), pupil need is identified and moderated as outlined in paragraph 4.2. For all other behaviour placements, recognising the short term intensive nature of provision for children that do not necessarily have Statements, the same formulaic approach as used for the Central PRU is employed; 50% of pupils funded at Range 4D and 50% of pupils funded at Range 5 on a monthly basis.
- Like other resourced provisions, the Behaviour Centres are not stand alone units. As such, it is not applicable to apply all the setting-need based factors that are included within the special school and the PRU funding models. The only setting need based factors that have been included within the calculation of Plus funding for the Centres in 2016/17 are the Churn factor (as per Central PRU above and calculated on the same basis), and the 2015/16 Budget Protection factor.

4.19 An interim funding model is being used in 2016/17 for the funding of Early Years Children's Centre Plus provision, as a review of this provision takes shape. This interim model applies the established principles of Place-Plus, setting the number of places on expected occupancy, funding all places at Range 4D, and including an additional allocation in response to estimated setting-based costs. The model will continue to be developed as the review of this provision takes shape.

4.20 For the funding of post 16 high needs students in the Further Education sector, it has been agreed with the relevant providers that, as, on average, colleges deliver around 60% of the hours delivered by schools, colleges are funded for the vast majority of students at 60% of the Ranges Model value for the primary need of the student. The exceptions are students with the primary need of sensory impairment (Hearing / Visual), where funding will continue to be allocated on an actual cost basis. Due to the specific support needs of these students in Further Education, and the diverse nature of their curriculum choices, it is not possible to formularise this funding element.

4.21 The funding for Education in Hospital in 2016/17 is allocated to local authorities outside of the DSG, based on a national formula, with the requirement that local authorities continue the same amount per place funding as in 2015/16 (which for Bradford is £18,000 per place). As such, the Place-Plus framework is not fully applicable. This is a pragmatic, short term funding approach, in place until a longer term solution can be developed (by the DfE).

4.22 The new Place-Plus framework for the funding of children with SEN in mainstream Primary and Secondary schools / academies mainstream has been applied in 2016/17 as follows. This approach has not been significantly different from our approach prior to 1 April 2013.

- The vast majority of funding, which supports the costs of children at School Action, School Action Plus and with Statements, is allocated to schools / academies through the SEN funding formulae – calculated on low prior attainment, FSM and IDACI. This funding is allocated to schools / academies within their overall funding allocations at the start of the financial year. This is a separately identified amount on budget statements. The expectation then is that schools / academies will meet the vast majority of the costs of support for children with additional needs from these resources.
- For children with Statements, a threshold has been established, at a value of £6,000. For all children with Statements, the first £6,000 is allocated within the SEN formulae and the school / academy meets this proportion from their identified funding allocation.
- For Statements with a value greater than £6,000, the balance between the full cost of the Statement (calculated using the established 7 Ranges Model) and the £6,000 threshold is allocated by the Local Authority as a separate individual amount, re-calculated on a monthly basis for the movement of pupils.
- A separate SEN Floor ensures that all mainstream settings receive a minimum amount of SEN formula funding, compared against the value of Statements of children at the school / academy. In effect, the Floor provides a top up for schools / academies with higher numbers of individual Statements at a value of greater than £6,000 that have lower levels of FSM and IDACI. The SEN Floor is re-calculated on a monthly basis as the position of Plus funding changes for the movement of children.
- On top of SEN formula funding, the Local Authority publishes a 'notional SEN' figure for each school, which identifies the proportion of delegated resources that should be made available to contribute to supporting children with SEN.

4.23 Within the 2016/17 DSG, a number of centrally managed services and strategies have been continued at existing levels. These have not operated according to the Place-Plus framework described above. As stated in paragraph 3.2, local authorities are permitted to continue to fund separately additional outreach and support services that may be managed centrally or may be devolved to other providers under service level agreements. In Bradford in 2016/17, these include: the Junction Project, SEN Teaching Support Services (formerly known as 'Learning Support Services or LSS'), the Youth Offending Team and support for Traveller Children. The DSG has also continued to meet the cost of out of authority of non-maintained placements for high needs children.

4.24 The DSG continues to fund mainstream and special school settings for the cost of non-transferrable education-focused specialist equipment for individual children. In 2015/16 this arrangement was extended to Early Years provision and the total DSG budget is now £137,500.

5. Places Setting for 2017/18

5.1 As summarised in paragraph 2.7, the 2017/18 planned (estimated) DSG allocation currently has provision for:

- For individual settings, the greater of either actual occupancy at October 2016 or the 2016/17 planned places total, with some adjustments to individual settings for known specific changes and planned increases.
- Further provision, not yet allocated to individual settings, of 120 places for the full financial year (continuing those introduced at January 2017) plus a further 120 places at September 2017 (with 7/12ths of the cost in 2017/18). These places will be available to allocate across different provisions, including out of authority settings and placements in independent and non maintained schools.

5.2 The Authority will continue to firm up places forecasts over the autumn term and will talk to providers, prior to agreeing the DSG's provision for high needs places with the Schools Forum for 2017/18 on 11 January 2017. There is some work that still needs to be done here for specific settings, including in confirming the forecasted need for places in the Further Education Sector as further data on numbers becomes available. Further discussions are also taken place about the sufficiency of places for SEMH.

5.3 The Authority will comply with the Education Funding Agency's notification of place changes process for 2017/18 for high needs places in academies and Further Education Institutions. The deadline for the EFA's process is 25 November 2016. The Local Authority continues to have flexibility to adjust places numbers for individual settings in 2017/18 and this will include adjustments to both pre and post 16 places in academies and maintained schools (in 2016/17 only pre 16 numbers could be adjusted in these settings).

5.4 The table below lists the currently planned / estimated 2017/18 places by existing Bradford-located individual high needs setting. These numbers include all places (early years, pre and post 16), including placements from other local authorities. Please note that these numbers are shown prior to the further work that is taking place to firm up numbers e.g. in FE settings and for SEMH.

Setting	Type (AP or SEND)*	October 2016 Occupancy (FTE)	16/17 Initial Planned Budget AY Funded Places (FTE)	17/18 FY April – Aug Updated Planned Places (FTE)	17/18 AY Sept - Mar Initial Planned Places (FTE)
Primary PRU	AP	43	42	50	50
Central PRU	AP	49	50	50	50
Ellar Carr PRU	AP	49	45	54	54
District PRU	AP	107	160	160	160
Acorn Centre	AP	5	10	10	10
Horizons Centre	AP	3	10	10	10
Long View Centre	AP	5	10	10	10
Phoenix Centre	AP & SEND	13	20	20	20
Early Years Children's Centre Plus **	SEND	38	68	68	68
ARC - Girlington Primary School	SEND	12	17	17	17
ARC - Swain House Primary School	SEND	14	20	20	20
ARC - Grove House Primary School	SEND	9	12	12	12
ARC – Hanson School	SEND	40	55	55	55
Special – Beechcliffe School	SEND	114	103	120	120
Special – Chellow Heights School	SEND	191	180	195	195
Special – Delius School	SEND	117.4	110	118	118

Special – Hazelbeck Academy	SEND	131	125	133	133
Special – High Park School	SEND	99	95	100	100
Special – Phoenix School	SEND	73.8	78	80	80
Special – Southfield Academy	SEND	243	222	245	245
Special – Oastler School	SEND	86	90	90	90
DSP – Carrwood Primary School	SEND	3	4	0	0
DSP – Denholme Primary School	SEND	6	8	8	8
DSP – Green Lane Primary School	SEND	11	10	13	13
DSP – High Craggs Primary Academy	SEND	3	6	6	6
DSP – Crossflatts Primary School	SEND	11	12	12	12
DSP – Beckfoot Academy	SEND	7	10	10	10
DSP – Oasis Academy (Lister Park)	SEND	4	4	4	4
DSP – Southfield Grange Campus	SEND	23	22	23	23
DSP – Parkside School	SEND	13	12	13	13
DSP – The Holy Family Catholic School	SEND	12	12	13	13
DSP – Beckfoot Thornton Academy	SEND	15	14	15	15
DSP – Titus Salt School	SEND	16	15	16	16
DSP – Bradford Academy	SEND	21	22	22	22
DSP – Haworth Primary Academy	SEND	5	6	6	6
DSP – Bradford Forster Academy	SEND	4	6	6	6
DSP – High Park Learn and Play	SEND	16	16	16	16
Education in Hospital – Airedale	SEND	7	22	22	22
Education in Hospital – BRI	SEND	25	11	11	11
Tracks	SEND	8	16	16	16
Post 16 in mainstream Bradford settings (schools and academies)	SEND	38	38	38	38
Further Education – Bradford College** *	SEND	109	105	105	109
Further Education – Shipley College***	SEND	51	93	93	93
Further Education – Aspire-Igen***	SEND	5	14	14	14
Additional Unallocated Places	SEND	n/a	20	120	240
Total Initial Planned Places		1,855.20	2,020	2,219	2,343

* There is cross over between AP and SEND in some provisions in Bradford. This distinction is based on the main designation of the setting.

** Early Years SEND / Children’s Centre Plus provision is currently under review. The places numbers by setting are as 2015/16, to provide for an equivalent DSG planned budget for Early Years SEN in 2017/18, understanding that the actual distribution of these places, between settings and between delegated and centrally managed services, is still to be determined.

*** Please note that Post 16 places in Further Education Colleges are set on an annual lagged basis.

5.5 Further provision has indicatively been made, not yet allocated to individual settings, for a further 120 places for the full 2017/18 financial year and a further 120 more places at September 2017. These places would be available to allocate across different provisions and also for out of authority settings and placements in independent and non maintained schools.

5.6 Noting that further work is taking place on planned place numbers at this stage, the Authority estimates that a minimum of 2,343 places will be funded through the High Needs Block in the 2017/18 academic year in Bradford-located settings; 1,979 places in SEND provisions and 364 places in Alternative Provision settings, including 120 + (240 x 7/12) additional currently unallocated places across provisions.

5.7 This represents a total minimum increase of 323 places on the 2016/17 academic year planned budget position.

5.8 Regarding the identification of places and students in the Further Education Sector, where necessary, LDAs are being converted into EHCPs and the process should be complete by the DfE's December 2016 deadline. From September 2016, young people aged 19 to 25 are only eligible for high needs funding (place funding and top up funding) where the young person has an EHCP in place. Once converted, EHCPs in the FE sector will be reviewed on an annual basis in line with the SEND Code of Practice. Pupils with an EHCP that transition into the FE sector will continue to have their plans reviewed on an annual basis. The FE sector is now included in the Council's SEND assessment and referral procedures. Any new referrals for an EHCP assessment for young people aged 16+ are made through the Council's established 'front door' procedures that include an initial review by education, social care and health professionals. Where these result in the issue of an EHCP, an FE provider can be named in the plan and the plan is then maintained as per the guidance set out in the SEND Code of Practice.

5.9 DSP providers will be aware that an adjustment is made each year to their October Census numbers that are used to calculate their primary or secondary mainstream formula allocations. This adjustment removes the number of funded places from the October Census number, so that these pupils are not double funded for the £10,000 element e.g. a school that has 500 pupils and is funded for 20 DSP places receives mainstream formula funding for 480 pupils and 20 lots of £10,000 from the High Needs Block. This adjustment has not been previously applied to the funding of the primary behaviour centres. However, this will be applied for the October 2016 census, which will be used to calculate 2017/18 financial year mainstream allocations for the host primary schools.

5.10 It has been agreed that an end of academic year reconciliation be carried out of the number of placements (annual composite) made by each of the 3 Behaviour and Attendance Collaboratives (BACs) against their planned available number. Where a BAC has exceeded its allocation, it is agreed that the BAC will repay the difference to the High Needs Block using an average place-value cost. This reconciliation and repayment will continue and will be applied for the reconciliation of 2016/17 academic year placements at September 2017.

5.11 A Joint SEND and Behaviour Partnership is now taking forward discussions on the future shape our SEND and AP provisions, including sufficiency of places. These discussions and review will develop in the context of the Government's AP reform and the introduction of the National Funding Formula.

Question 1: Do you have any comments on the places (or the distribution of places) that are planned to be funded from the High Needs Block in 2017/18?

6. Proposed Place-Plus Funding Model for the 2017/18 Financial Year

6.1 It is the Authority's view that Bradford's current Place-Plus funding system is still robust and fit for purpose. As a result, we propose to make only targeted adjustments for the 2017/18 financial year, with the purposes of:

- Supporting value for money within our High Needs Block by setting a correct balance between providing stability through budget protections for individual settings whilst avoiding 'locking in' an incorrect distribution of funding for an extended period of time.
- Ensuring that our Place-Plus system responds to appropriately fund the changing nature of provision, including that offered by our resourced units attached to mainstream schools and academies.

6.2 As stated earlier in this document, regarding the identification of places and students in the Further Education Sector, where necessary, LDAs are being converted into EHCPs and the process should be complete by the DfE's December 2016 deadline. From September 2016, young people aged 19 to 25 are only eligible for high needs funding (place funding and top up funding) where the young person has an EHCP in place. Once converted, EHCPs in the FE sector will be reviewed on an annual basis in line with the SEND Code of Practice. Pupils with an EHCP that transition into the FE sector will continue to have their plans reviewed on an annual basis. The FE sector is now included in the Council's SEND assessment and referral procedures. Any new referrals for an EHCP assessment for young people aged 16+ are made through the Council's established 'front door' procedures that include an initial review by education, social care and health

professionals. Where these result in the issue of an EHCP, an FE provider can be named in the plan and the plan is then maintained as per the guidance set out in the SEND Code of Practice.

6.3 An interim funding model is being used for the funding of Early Years Children’s Centre Plus provision, as a review of this provision takes shape. This interim model applies the established principles of Place-Plus, setting the number of places on expected occupancy, funding all places at Range 4D, and including an additional allocation in response to estimated setting-based costs. The model will continue to be developed as the review of this provision takes shape.

6.4 We propose to continue to use the existing Ranges Model to categorise children for funding purposes. This Ranges Model is shown in Appendix 1.

6.5 Unless specifically discussed below, in paragraphs 6.6 to 6.7, we propose to apply our Place-Plus model in the same way in 2017/18 as we did in this current financial year as is set out in paragraph 4. For clarity this includes continuing to:

- Fund the Further Education Sector as set out in paragraph 4.20.
- Use the formulaic approach for the funding of non-statemented placements in specialist settings as set out in paragraphs 4.17 and 4.18.
- Calculate the SEN Funding Floor for mainstream settings at the same cash values as 2016/17 as set out in paragraph 4.22.
- Fund all assessment places at Range 4D, with the value of funding paid (where necessary) changing from the point the Assessment Panel has made its determination, as set out in paragraphs 4.3 and 4.4.
- Fund places at PRUs and Primary Behaviour Centres at £8,000, unless specifically agreed to fund at £10,000 (due to the nature of their provision), as set out in paragraphs 3.1 and 4.17.
- Fund additional place-element in real time during the year with an end of year reconciliation, which could mean a negative adjustment if the setting has been allocated too much additional places funding for its annual composite occupancy, as set out in paragraph 4.15.
- Fund Education in Hospital places at the same amount per place as set out in paragraph 4.21.

6.6 We propose to adjust the cash budget protection factor applied to special schools, DSPs and the primary behaviour centres, so that this factor limits a setting’s reduction in Place-Plus funding to 3.0% of last year’s allocation. Currently, this factor limits the reduction to a maximum of 1.5% of last year’s allocation. In adjusting this, we are looking to establish a balance for the future between providing stability for individual settings whilst avoiding ‘locking in’ an incorrect distribution of funding for an extended period of time, based on the principle that funding should follow the pupil. Bradford’s formula for special schools, prior to the adoption of place-plus, included a 3% budget protection factor. This was also the level of cash budget protection applied for mainstream primary and secondary allocations. We increased the level of protection to 1.5% during the place-plus introduction phase, recognising the possible instability that ‘untested’ funding change may produce. As place-plus is now established, we propose to bring the value of budget protection back to 3.0% for all applicable settings. Indicatively, this would have adjusted the protection factor this year as follows (based on the September 2016 current year spend position):

	Numbers @ 1.5%	Cost at 1.5%	Numbers @ 3.0%	Cost at 3.0%
Special Schools	3 out of 8	£232,600	2 out of 8	£140,100
DSPs	10 out of 16	£260,900	9 out of 16	£229,500
Primary Centres	3 out of 4	£48,500	3 out of 4	£41,700
Total	16 out of 28	£542,000	14 out of 28	£411,300

This proposed reduction in protection should be assessed alongside the proposal in paragraph 6.8 below to introduce a small setting protection factor for DSPs and primary behaviour centres. The need for protection should also be seen in the light of the growth in places (most settings in the future will see an increase in

cash budget rather than a decrease; budget decreases are likely to be the result of a change in distribution of provision where funding does need to follow the child).

6.7 We propose to establish at April 2017 a small setting funding factor for resourced provisions attached to mainstream settings, which would be applied for the funding of DSPs * and the primary behaviour centres, as the role of resourced provisions within Bradford's SEND and AP offer, along with funding implications, will continue to be reviewed and discussed with providers. We propose this as a temporary measure, with future proposals to be considered as part of the wider review of the District's provision and funding model (in the context of National Funding Formula).

A small setting funding factor is proposed especially in response to feedback from providers about the changing nature of their provisions, growth in their costs and the extent of subsidy from the mainstream school's budget. The small setting funding factor will provide an additional sliding-scale 'lump sum' in support of minimum costs. Its purpose is to help provide additional financial support for the delivery and management of provision (with a view that resourced units are increasingly mini-special schools). Its purpose is not to increase the value of funding based on pupil-led need; this would be done within the framework of our existing Ranges Model and following further discussion e.g. by assessing that children placed in resourced provisions have levels of need that correspond with higher bands of funding in our Ranges Model .

It is proposed to apply the same methodology as the small setting funding factor for special schools, but using a cut of off 24 places, rather than 75, as follows:

an additional sum, for resourced provisions with fewer than 24 places, to ensure a minimum level of funding for fixed costs. The formula for DSPs in 2017/18 would be:

$$\begin{aligned} A & \quad (24 \times \text{£}10,000 \times 20\%) \text{ this is } \text{£}48,000 \\ B & \quad (\text{setting's place funding} \times 20\%) \\ & = \text{top up to the value of A where B is less than A} \end{aligned}$$

For example, a DSP with 12 places would receive an additional sum of £24,000. A DSP with 6 places would receive £36,000.

The formula for the primary behaviour centres in 2017/18 would be:

$$\begin{aligned} A & \quad (24 \times \text{£}8,000 \times 20\%) \text{ this is } \text{£}38,400 \\ B & \quad (\text{setting's place funding} \times 20\%) \\ & = \text{top up to the value of A where B is less than A} \end{aligned}$$

For example, a primary behaviour centre with 10 places would receive an additional sum of £22,400.

The gross indicative cost of this small setting funding factor is £394,600, which would be partially offset by the reduced cost of protection under the proposal set out in paragraph 6.7.

* Please note that this factor would not be applied to the ARC provisions.

Question 2: Do you agree with the proposal to continue to use the existing Ranges Model (as shown in Appendix 1) to calculate the 'Plus' funding element for the 2017/18 financial year? If not, please explain why not.

Question 3: Do you have any comments on the values of top ups allocated by the Ranges Model and the extent to which these should change / should not change in the 2017/18 financial year?

Question 4: Do you agree with the proposal to continue to apply unchanged the vast majority of our current Place-Plus model i.e. if a change is not set out in paragraphs 6.6 to 6.8 then the current methodology will be applied in 2017/18? If not, please explain why not and please specify the elements of the funding model you believe should be changed.

Question 5: Do you agree with the changes to the existing funding model for 2017/18, as outlined in paragraphs 6.6 (budget protection) and 6.7 (small setting funding factor)? If not, please outline which changes you do not agree with and the reasons why you do not agree.

Question 6: Are there any further changes that you would wish to see made to the funding model in 2017/18? Please give details.

Question 7 – Do you have any other comments on the funding model that you have not recorded elsewhere.

7. Consultation Responses

7.1 Please use the responses form at Appendix 2 to submit your views on the proposals outlined in the consultation. There is space in this form for you to comment on any aspect of the proposals. If you wish to discuss these proposals in more detail, or have any specific questions, please contact Andrew Redding using the contact details shown in paragraph 1. Please ensure that your response is submitted by the deadline of **Monday 28 November 2016**.

8. Next Steps

8.1 The Schools Forum will make final recommendations on the approach to the funding of high needs provision for the 2017/18 financial year on 11 January 2017. These recommendations will be made following consideration of the responses receive to this consultation and once the value of DSG funding allocated to the Authority for 2017/18 has been confirmed.

8.2 Subject to the agreement of the Council's Executive Committee, the recommended approach will be used to allocate DSG funding from 1 April 2017.

8.3 We currently await further information from the DfE on the development and timetable for implementation of the National Funding Formula. These changes are very likely to directly affect the funding of high needs provision and the quantum of the High Needs Block within the DSG in future years. A clear next step therefore, is to work through the implications and to develop our responses as announcements are made.

9. Appendices

Appendix 1 The 7 Ranges Model
Appendix 2 Consultation Responses Form

HIGH NEEDS PROVISION: FUNDING CATEGORIES, BANDS & AMOUNTS 2016/17

	Range 1	Range 2	Range 3	Range 4				Range 5	Range 6	Range 7
				Band A (16.5-21.5 hours)	Band B (22-27 hours)	Band C (27.5-34.5 hours)	Band D (35+ hours)			
PRIMARY NEED Additional "Plus" Funding			£0	£981	£3,092	£4,738	£7,380	£10,761	£14,337	£23,558
Mainstream Autism & SLCN						SLCN	ASD		ASD+	ASD++
Mainstream MLD/SLD/PMLD			MLD		MLD+	SLD	PMLD	SLD+	PMLD+	PMLD++
Mainstream PD							PD		PD+	PD++
Mainstream HI/VI						HI/VI		HI+/VI+		
Mainstream BESD							BESD		BESD+	BESD++

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Mainstream funding is within colour coded Bands (mainly range 4)
Funding is determined by actual Primary Need and is shown as text

RESPONSES FORM**Consultation on Funding High Needs Provision 2017/18**

Name _____ Setting Name _____

THE DEADLINE FOR RESPONSES TO THIS CONSULTATION IS MONDAY 28 NOVEMBER 2016

Please send completed questionnaire responses to:

School Funding Team
 City of Bradford Metropolitan District Council
 1st Floor, Britannia House,
 Hall Ings
 Bradford
 BD1 1HX

Tel: 01274 432678

Fax: 01274 435054

Email: andrew.redding@bradford.gov.uk

Please complete the questionnaire by marking the appropriate boxes. There is a space below each question for you to record comments.

Question 1: Do you have any comments on the places (or the distribution of places) that are planned to be funded from the High Needs Block in 2017/18?

Question 2: Do you agree with the proposal to continue to use the existing Ranges Model (as shown in Appendix 1) to calculate the 'Plus' funding element for the 2017/18 financial year? If not, please explain why not.

Strongly Agree On Balance Agree (some reservations) Strongly Disagree

If not, please provide further explanation here:

Question 3: Do you have any comments on the values of top ups allocated by the Ranges Model and the extent to which these should change / should not change in the 2017/18 financial year?

Question 4: Do you agree with the proposal to continue to apply unchanged the vast majority of our current Place-Plus model i.e. if a change is not set out in paragraphs 6.6 to 6.8 then the current methodology will be applied in 2017/18? If not, please explain why not and please specify the elements of the funding model you believe should be changed.

Strongly Agree On Balance Agree (some reservations) Strongly Disagree

If not, please provide further explanation here:

Question 5: Do you agree with the changes to the existing funding model for 2017/18, as outlined in paragraphs 6.6 (budget protection) and 6.7 (small setting funding factor)? If not, please outline which changes you do not agree with and the reasons why you do not agree.

	Strongly Agree	On Balance Agree	Strongly Disagree
Cash Budget Protection at 3.0%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Small Setting Funding for Resourced Units	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If not, please provide further explanation here:

Question 6: Are there any further changes that you would wish to see made to the funding model in 2017/18? Please give details.

Question 7 – Do you have any other comments on the funding model that you have not recorded elsewhere?

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SCHOOLS FORUM AGENDA ITEM

For Action

For Information

Brief Description of Item (including the purpose / reason for presenting this for consideration by the Forum)

This report asks the Forum to consider the position of the funding of Schools and Early Years Block centrally managed and de-delegated items from the DSG in 2017/18 and what further consideration should be given; what review work should take place, in advance of making final recommendations for 2017/18 at the January 2017 meeting.

Date (s) of any Previous Discussion at the Forum

A final report, which outlined the full recommendations from the Forum's Working Group for this current financial year, was presented to the Forum on 6 January 2016. At the last meeting, the Schools Forum agreed the publication of the primary and secondary consultation document for 2017/18, which asks for feedback from maintained schools on the continuation of de-delegated funds.

In making recommendations for 2016/17, the Schools Forum also agreed the cessation of the historic commitment to school improvement and Early Childhood Services funds at 1 September 2017. What the Forum has already agreed for these funds in 2017/18 is stated below.

Members are also reminded that the de-delegated fund for Minority Ethnic School Support ceased on 1 May 2016.

Background / Context

The following funds were held in this current financial year from the Schools and Early Years Blocks.

Type 1

Funds that are specifically permitted by the Funding Regulations or where existing historic commitments from the DSG remain in place. The cost of these funds is 'topslliced' from both schools and academies; it is then a requirement that schools and academies can access services on the same basis. **The 3 funds are:**

- | | |
|---|-------------------|
| ○ Schools Forum Costs | £10,000 |
| ○ School Admissions | £577,600 |
| ○ DSG matched contribution to school improvement | £1,318,600 |

Type 2

Funds, where the funding is originally delegated to all schools and academies through formula funding, but where maintained schools can decide to 'de-delegate' amounts back to the centre for specific named purposes. Only maintained schools contribute to these funds and only maintained schools can access these within further contributions from their delegated budgets. **The 8 funds are:**

- | | |
|--|-------------------|
| ○ ESBD School Support Team | £426,360 |
| ○ Minority Ethnic School Support Team | £94,350 |
| ○ FSM Eligibility Assessment | £119,100 |
| ○ Fischer Family Trust Licences | £33,560 |
| ○ School Maternity / Paternity 'insurance' fund | £1,565,400 |
| ○ Trade Union Facilities Time | £306,000 |
| ○ Trade Union Health & Safety Representative Time | £46,765 |
| ○ School Staff Public Duties and Suspensions Fund | £62,920 |

The table overleaf shows the amount per pupil contribution values to these funds in 2016/17 by phase. Appendix 1 provides an updated summary of the position of our funds against other local authorities in 2016/17. This shows our comparative spending per pupil as well as the percentage of local authorities that de-delegated for permitted purposes.

Background / Context (continued)

2016/17 Fund	Early Years £app	Primary £app	Secondary £app
Schools Forum Costs	£0.11	£0.11	£0.11
School Admissions	n/a	£6.76	£6.76
DSG Contribution to School Improvement	£18.37	£16.97	£10.45
ESBD School Support Team *	n/a	£9.10	n/a
Minority Ethnic School Support Team *	n/a	£1.49	£1.49
Fischer Family Trust – School Licences *	n/a	£0.53	£0.53
School Maternity / Paternity 'insurance' *	£18.63	£25.62	£17.93
Trade Union Facilities Time *	£4.56	£4.56	£4.56
Trade Union Health and Safety Rep Time *	£0.70	£0.70	£0.70
School Staff Public Duties & Suspensions Fund *	£0.94	£0.94	£0.94
Total £app maintained schools	£43.30	£66.78	£43.47
Total £app academies (* do not contribute)	£43.30	£23.84	£17.33
FSM Eligibility Assessments (FSM based) *	n/a	£5.80	£5.14

Details of the Item for Consideration

The information in this report is presented to continue the discussion with the Schools Forum on these centrally managed and de-delegated funds. The Forum will be required to make its final recommendations for 2017/18 funds on 11 January 2017. In particular then, Forum Members are asked to consider what further information is needed; what review work should take place in order for final recommendations for 2017/18 to be made.

General Parameters and Expectations for 2017/18

The Schools Forum made the following new recommendations relating to specific funds in the 2017/18 financial year at its meeting held on 6 January 2016:

- Agreed to continue the DSG's Matched Contribution to School Improvement and Early Childhood Services for the period 1 April 2017 to 31 August 2017 at reduced values (the values for the period 1 April 2015 to 31 August 2015 reduced by 25%).
- Agreed to cease the DSG's Matched Contribution to School Improvement and Early Childhood Services at 31 August 2017, with the sums released to Primary, Secondary and Early Years delegated budgets in 2017/18 and 2018/19.
- The Local Authority is expected to manage transition to minimise the cost to the 2017/18 DSG of staffing restructure.

On this basis, the value of the DSG's Contribution to School Improvement and Early Childhood Services reduces from £1,318,600 in 2016/17 to £482,426 in 2017/18 and then £0 in 2018/19.

Members are reminded that the de-delegated fund for Minority Ethnic School Support ceased on 1 May 2016 and no de-delegation will apply in 2017/18.

The Authority anticipates that the Schools Forum will agree to continue in 2017/18 the small budget for Schools Forum costs (£10,000), and the DSG's funding of admissions (£577,600), on the same basis and values as in 2016/17. Admissions funding from April 2018 may be affected by proposals for the National Funding Formula (a move to a formula basis, rather than historic actual spending).

The remainder of this report then focuses on the position of Education Services Grant (ESG) and de-delegated funds. The Authority would generally expect, and recommend, the Forum to continue de-delegation in 2017/18, subject to the consideration of feedback from the consultation, where there is still critical mass (a sufficient number of maintained schools) and / or where the framework is already in place for academies to buy into centrally managed arrangements, such as trade union facilities time.

Education Services Grant (ESG) Funds

As raised in reports to the last Forum meeting, the DfE proposes to transfer the Centrally Retained Duties element of the ESG into the Schools Block DSG from 1 April 2017. Bradford currently receives £1.43m, calculated on £15 per pupil for all pupils state funded schools and academies. This funding is allocated to support the Authority in meeting its statutory duties relating to all state funded schools and academies. We currently await further guidance from the DfE on how this funding can be managed within the DSG and to what statutory function it relates. At this time, the Authority anticipates retaining an ESG sum centrally within the Schools Block in 2017/18 on an amount per pupil 'passporting' basis i.e. the Authority would expect to have access to ESG funding at the value the DfE funds currently provide to the DSG, without topslice, with this value increasing (or decreasing) in line with year on year changes in pupil numbers. The baseline value per pupil being

Details of the Item for Consideration (continued)

transferred into the Schools Block is £16.83 (this is greater than £15 because the £15 is based on the £1.43m divided by all pupils, including those in the High Needs and Early Years Blocks; the transfer into the Schools Block means that only pupils in primary and secondary schools and academies are brought into the calculation, so the £1.43m is divided by lower total of pupils). On current estimates of Schools Block pupil numbers, a sum of £1.445m would be centrally retained in 2017/18.

The DfE has also proposed to allow new additional de-delegation, with contributions taken from maintained schools only, to provide additional funding for local authorities in meeting their statutory functions relating to maintained schools. This new facility comes in response to the cessation of the ESG General Rate funding from September 2017. We await further guidance on this from the DfE, including for what statutory duties additional de-delegation can take place. We must consider this additional new facility in the context of the overall position of de-delegation and in the light of the direction of travel and timetable for the conversion of maintained schools in Bradford to academies.

De-Delegated Funds

Members are reminded that we have asked maintained schools for views on the continuation of de-delegation within the consultation paper, which was agreed at the last meeting. The deadline for responses to the primary and secondary consultation document is 14 October. As a result, the feedback received from maintained schools will be presented verbally to the Forum at this meeting.

Members are also reminded that the Schools Forum has previously established the principle that the values of contributions per pupil to some de-delegated funds will not exceed the value in the previous year to compensate for the loss in budget brought by further conversions of maintained schools to academy status i.e. all things being the same, as schools convert to academies, the cash value of these de-delegated funds will reduce, with any gap in funding as a result of this reduction being recovered through trading services.

This principle affects the following funds: ESD Support Team, Trade Union Facilities Time, Trade Union Health and Safety Rep Time and FSM Eligibility Assessments.

The remaining de-delegated funds (Fischer Family Trust Subscription, School Maternity / Paternity Insurance and School Staff Public Duties and Suspensions) are calculated on actual expected costs and the values of per pupil contributions can vary year on year.

Under proposals for the National Funding Formula (NFF), which were published in the 1st stage consultation in March, de-delegation will be required to cease at 1 April 2019. In considering this, we have previously highlighted to the Schools Forum that the rate of conversion of maintained schools in Bradford to academy status may be such that consideration may need to be given, earlier than for 1 April 2019, to whether de-delegation remains effective and efficient. The Schools Forum will need to consider the position of academy conversions in taking decisions about the position of de-delegated funds at 1 April 2017. De-delegation is a mechanism through which contributions can be easily collected from maintained schools for centrally managed funds. The cessation of de-delegation does not cease per se the existence of centrally managed services (perhaps with the exception of the maternity / paternity 'insurance' scheme). Where buy in by academies remains strong, these central services could continue.

For the 2017/18 financial year, de-delegation cannot be applied to a school that has converted to academy before 2 April 2017. In addition, de-delegation must cease, from 1 September 2017, for any school that converts between 2 April and 1 September 2017. So, there is a year on year impact as well as an in year impact on the values that can be taken out of maintained school budgets to fund de-delegated items. This means that the managers of these funds must trade services with the newly converted academies or must reduce their cost bases in order to avoid deficit. Managers must be quick in doing this during the year.

There are some funds however, the School Maternity / Paternity Insurance fund in particular, but also FFT licences, that will become more economically unviable as more schools convert. This is because it will become increasingly difficult to recover the value of actual spending in these funds as the number of maintained schools sharply reduces year on year and it may become cost inefficient for individual schools to buy in.

We are also aware that some nursery schools will be entering into service level agreements with MATs and the position of the central retention of funds within the Early Years Block should be considered in this context i.e. whether it will be more efficient to cease retention to enable nursery schools to operate on the same basis as their MATs (including buying into Local Authority services).

The purpose of this report then is to highlight these dynamics and to ask the Forum to begin to consider the position of de-delegated funds for 1 April 2017. The Authority would generally expect, and recommend, the Forum to continue de-delegation in 2017/18, subject to the consideration of feedback from the consultation, where there is still critical mass (a sufficient number of maintained schools) and / or where the framework is already in place for academies to buy into centrally managed arrangements, such as trade union facilities time.

Details of the Item for Consideration (continued)

For an indication of the position, the first table below shows what the values of de-delegated funds would be in 2017/18 applying the agreed principles and calculated on the numbers of maintained schools at 1 October 2016. The second table indicates what the position would be at 1 April 2017 if all the known academy conversions currently in the system take place by this date as expected.

Based on schools at 1 October 2016	Primary	Secondary	Total 17/18	Reduction on 2016
ESBD School Support	389,219		389,219	-37,143
Costs of FSM Eligibility Assessment	79,150	17,859	97,010	-22,058
Fischer Family Trust - School Licences	27,477	6,083	33,560	0
School Maternity / Paternity 'insurance' fund	1,200,000	295,000	1,495,000	0
Trade Union Facilities Time	195,103	43,195	238,298	-50,494
Trade Union Health & Safety Rep Time	29,814	6,601	36,414	-7,716
School Staff Public Duties & Suspensions	40,113	8,881	48,994	-10,382
Total	1,960,875	377,619	2,338,495	-127,793
Number of Maintained Schools	127	8		-12

Based on a forecast of schools at 1 April 2017	Primary	Secondary	Total 17/18	Reduction on 2016
ESBD School Support	236,425		236,425	-189,936
Costs of FSM Eligibility Assessment	51,152	6,606	57,758	-61,310
Fischer Family Trust - School Licences	16,690	2,255	18,946	-14,614
School Maternity / Paternity 'insurance' fund	728,923	109,363	838,286	-656,714
Trade Union Facilities Time	118,512	16,013	134,526	-154,266
Trade Union Health & Safety Rep Time	18,110	2,447	20,557	-23,573
School Staff Public Duties & Suspensions	24,366	3,292	27,659	-31,717
Total	1,194,180	139,977	1,334,156	-1,132,131
Number of Maintained Schools	83	3		-61

Please be aware that further conversions between 2 April and 1 September 2017 will reduce the value of de-delegated further during the 2017/18 financial year. Please note that this is a rough analysis of the position.

These tables especially highlight the reduction in the number of maintained secondary schools and, especially, the vulnerability within the School Maternity / Paternity Insurance fund for this phase. We anticipate that the Schools Forum will wish specifically to consider the position of the secondary phase and may make decisions for this phase that are different from primary.

How does this item support the achievement of the District's Education Priorities

The recommendations on the future funding of services will need to support the development of the sector-led improvement model and must find the correct balance between cost effectiveness and value for money, the protection and delivery of essential services for vulnerable children, the protection of school and academy budgets against unpredictable expenditure and giving schools and academies flexibility to take their own decisions, in response to a changing landscape. These build on the principles previously established by the Forum.

Implications for the Dedicated Schools Grant (DSG) (if any)

Recommendations will have direct implications for the distribution of the Schools and Early Years Blocks and for delegated formula allocations.

Recommendations

The Forum is asked to consider the position of the funding of Schools and Early Years Block centrally managed and de-delegated items from the DSG in 2017/18 and what further consideration should be given; what review work should take place, in advance of making final recommendations for 2017/18 at the January 2017 meeting.

List of Supporting Appendices / Papers (where applicable)

Appendix 1 – Benchmarking of 2016/17 Funds

Contact Officer (name, telephone number and email address)

Andrew Redding, Business Advisor (Schools),
01274 432678
andrew.redding@bradford.gov.uk

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2016/17 De-Delegated / Central S251 Budget Benchmarking

Schools Forum Document GR Appendix 1

based on 2016/17 S251 database published 29.09.16; excluding Bradford's allocation of one off monies

Bradford Ongoing DSG Budget Comparison

Type	Bradford 2016/17 Ongoing DSG Budget	Per Pupil Spend 2016/17				negative = Bfd is lower				Comments	
		Bradford	England National Median *	Statistical Neighbours Median	Met Districts Median	Yorks & Humberside Median	Bfd Cash Difference to National	Bfd Cash Difference to Stat Neigh	Bfd Cash Difference to Met Dist		Bfd Cash Difference to Y&H
1.1.1 Contingencies	256,863	4	9	4	7	12	-367,080	-20,445	-228,426	-575,061	
1.1.2 Behaviour Support Services	426,361	6	6	6	1	0	10,399	10,399	357,034	426,361	
1.1.3 Support for UPEG and Bilingual Learners	94,350	1	5	2	3	1	-252,285	-44,304	-113,631	25,023	
1.1.4 FSM Eligibility Assessment	119,068	2	1	1	1	1	49,741	49,741	49,741	49,741	
1.1.5 Insurance	0	0	2	0	0	0	-138,654	0	0	0	
1.1.6 Museams / Libraries	0	0	0	0	0	0	0	0	0	0	
1.1.7 Licences / Subscriptions	33,560	0	2	0	0	0	-105,094	33,560	33,560	33,560	FFT Subscription
1.1.8 Staff Costs Supply Cover - excluding Facilities Time	1,554,376	22	6	12	6	0	1,138,414	722,452	1,138,414	1,554,376	Maternity Scheme
1.1.9 Staff Costs - Supply Cover for Facilities Time	332,922	5	2	4	4	3	194,268	55,614	55,614	124,941	
Total De-Delegated Items (Maintained Schools)	2,817,501	41	34	44	41	39	485,289	-207,981	0	138,654	
1.4.10 Growth Fund	2,658,421	27	21	27	9	10	566,422	-31,292	1,761,850	1,662,231	
1.4.1 Contribution to Combined Budgets (all phases)	1,318,631	13	19	14	11	15	-574,130	-76,035	222,822	-175,654	
1.4.2 Admissions (all phases)	577,600	6	9	7	7	7	-318,971	-119,733	-119,733	-119,733	

Further Info on De-Delegated Funds

Type	No. of Authorities that De-Delegate				% of Authorities that De-Delegate			
	England National *	Statistical Neighbours	Met Districts	Yorks & Humberside	England National	Statistical Neighbours	Met Districts	Yorks & Humberside
1.1.1 Contingencies	110	6	27	12	73%	60%	73%	80%
1.1.2 Behaviour Support Services	79	5	20	7	53%	50%	54%	47%
1.1.3 Support for UPEG and Bilingual Learners	78	6	22	8	52%	60%	59%	53%
1.1.4 FSM Eligibility Assessment	88	8	22	9	59%	80%	59%	60%
1.1.5 Insurance	23	5	7	2	15%	50%	19%	13%
1.1.6 Museams / Libraries	17	4	8	4	11%	40%	22%	27%
1.1.7 Licences / Subscriptions	56	4	10	2	37%	40%	27%	13%
1.1.8 Staff Costs Supply Cover - excluding Facilities Time	77	8	21	7	51%	80%	57%	47%
1.1.9 Staff Costs - Supply Cover for Facilities Time	124	9	30	11	83%	90%	81%	73%
					(out of 150)	(out of 10)	(out of 37)	(out of 15)

* excludes City of London and Isles of Scilly

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