

Schools Forum
Wednesday, 6 December 2017 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 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 18 OCTOBER 2017 & MATTERS ARISING Minutes 1 - 30

Recommended –

That the minutes of the meeting held on 18 October 2017 be signed as a correct record (previously circulated).

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.

6. **THE AUTUMN SPENDING REVIEW & NATIONAL FUNDING FORMULA (i)**

An update will be given verbally on any further announcements related to the National Funding Formula.

(Andrew Redding – 01274 432678)

7. **2017/18 DSG SPENDING POSITION AND ONE OFF MONIES (i)** 31 - 38

The Business Advisor (Schools) will present a report, **Document IA**, which updates members on the forecasted spending positions of High Needs Block and centrally managed and de-delegated funds held within the DSG in 2017/18. This document gives Members a view of the estimated value of one off monies that will be available to add to the 2018/19 DSG Headroom and a view of the uses of these monies.

Recommended –

Members are asked to consider whether sufficient information has been provided to enable final recommendations to be made on 10 January 2018 on the use of one off monies.

(Andrew Redding – 01274 432678)

8. **2018/19 DSG UPDATE (i)** 39 - 44

The Business Advisor (Schools) will present a report, **Document IB**, which provides a forecast of the anticipated DSG cost pressures position in the 2018/19 financial year. Please note that any further information on the DSG for 2018/19 that may be announced by Government before 6 December will be presented verbally at the meeting.

Recommended –

Members are asked to consider the information presented in the report, in advance of making final recommendations on 10 January 2018.

(Andrew Redding – 01274 432678)

9. **CONSULTATION OUTCOMES - PRIMARY AND SECONDARY FORMULAE (i)** 45 - 56



The Business Advisor (Schools) will present a report, **Document IC**, which asks Members to consider the outcomes of the consultation, which was agreed at the last meeting. The report also includes further information on the options for the Schools Block headroom. Please note that an appendix to Document IC will be tabled at the meeting as it contains the outcome of a consultation period, which concludes on 4 December.

Recommended –

The Forum is asked to consider the outcomes of the consultation and whether any of the proposals should be changed in the light of responses. Schools Members will be asked to make final recommendations on the structure of the formulae, and the criteria for the allocation of Schools Block funds, on 10 January 2018. As such, Members are asked to consider whether sufficient information has now been provided to enable these final recommendations to be made.

(Andrew Redding – 01274 432678)

10. CONSULTATION OUTCOMES - EARLY YEARS SINGLE FUNDING FORMULA 2018/19 (i) 57 - 62

The Business Advisor (Schools) will present a report, **Document ID**, which asks Members to consider the outcomes of the consultation on the 2018/19 Early Years Single Funding Formula.

Recommended –

The Forum is asked to consider the outcomes of the consultation and whether any of the proposals should be changed in the light of responses. Members will be asked to make final recommendations on the structure of the formulae on 10 January 2018. As such, Members are asked to consider whether sufficient information has now been provided to enable these final recommendations to be made.

(Andrew Redding – 01274 432678)

11. CONSULTATION OUTCOMES - FUNDING HIGH NEEDS 2018/19 (i) 63 - 70

The Business Advisor (Schools) will present a report, **Document IE**, which asks Forum Members to consider the outcomes of the consultation on the 2018/19 High Needs Funding Model and the planned number of high needs places to be commissioned by the Authority. Document IE also gives an update on the position of other strategic high needs funding matters. This update is provided in advance of asking Members to make final recommendations on 10 January 2018.



Recommended –

The Forum is asked to consider the outcomes of the consultation and whether any of the proposals should be changed in the light of responses. Members will be asked to make final recommendations on the structure of the formulae on 10 January 2018. As such, Members are asked to consider whether sufficient information has now been provided to enable these final recommendations to be made.

(Andrew Redding – 01274 432678)

12. INDICATIVE BUDGETS 2018/19 PRIMARY & SECONDARY SCHOOLS AND ACADEMIES (i) 71 - 80

The Business Advisor (Schools) will present a report, **Document IF**, which provides members with updated indicative modelling of Primary & Secondary delegated budget shares in 2018/19, using the pupil numbers taken from the October 2017 Census. This modelling is tabled only for information at this stage, prior to asking Members to make final recommendations on 10 January 2018.

Recommended –

The Forum is asked to note the Primary and Secondary modelling information. A further update will be provided on 10 January, when Forum Members will be asked to make final recommendations on the values of funding allocated via each formula factor. Members are asked to consider whether sufficient information has been provided to enable final recommendations to be taken on 10 January 2018 on the matters presented in this report.

(Andrew Redding – 01274 432678)

13. CENTRAL SCHOOLS, EARLY YEARS & DE-DELEGATED SCHOOLS BLOCK FUNDS (i) 81 - 98

The Business Advisor (Schools) will present a follow up report, **Document IG**, which asks Forum Members to further consider the position of the funding of Schools and Early Years Block central and de-delegated items from the DSG in 2018/19, following the initial discussion in the meeting of 18 October 2017

Recommended –

Members are asked to note the information and to consider whether and further information is needed to enable final recommendations and decisions to be taken on 10 January 2018



on the funding of centrally managed and de-delegated Early Years, Schools and Central Schools Block items in 2018/19.

The Forum is asked for feedback specifically on Trade Union Facilities Time and the proposal for the de-delegation from the primary phase for behaviour support.

(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:

- Schools Forum membership
- Update from the Schools Financial Performance Group (SFPG)
- Update on School / Academy Budgets
- 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

Recommended –

The Forum is asked to note the information provided.

(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 10 January 2018.

(a) Denotes an item for action

(i) Denotes an item for information



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MINUTES OF THE MEETING OF THE SCHOOLS FORUM HELD ON WEDNESDAY 18 OCTOBER 2017 AT CITY HALL, BRADFORD

Commenced	0810
Adjourned	1015
Reconvened	1030
Concluded	1045

PRESENT

SCHOOL MEMBERS

Ashley Reed, Deborah Haworth, Dianne Richardson, Dominic Wall, Donna Willoughby, Emma Hamer, Gill Holland, Helen Williams, Ian Morrel, Kevin Holland, Mary Copeland, Nicky Kilvington, Nigel Cooper, Sally Stoker, Tahir Jamil, Tehmina Hashmi, Trevor Loft, Sue Haithwaite, Tracey Wilkinson, Salt Stoker

NON SCHOOLS MEMBERS & NOMINATED SUB SCHOOL MEMBERS

Alison Kaye, Ian Murch, Irene Docherty and Vivienne Robinson

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
Asad Shah	Committee Services Officer
Dawn Haigh	Principal Finance Officer (Schools)
Jenny Cryer	Assistant Director, Performance, Commissioning and Partnerships
Judith Kirk	Deputy Director, Education, Employment and Skills
Lynn Denholme	Early Years Strategic Manager
Michael Jameson	Strategic Director, Children's Services
Raj Singh	Business Advisor
Tim Barker	Human Resources - Manager Employee Relations

OBSERVERS

Councillor Ward

Lynn Murphy Business Manager, Feversham College

APOLOGIES

MEMBERS – Brent Fitzpatrick, Lesley Heathcote, Maureen Cairns, Nick Weller, Ray Tate, Sami Harzallah, Wahid Zaman COUNCIL OFFICERS – Stuart McKinnon-Evans, Strategic Director, Corporate Services

DIANNE RICHARDSON IN THE CHAIR



CHAIR'S OPENING REMARKS

In introducing the meeting, the Chair welcomed Gill Holland, Deborah Howarth and Ashley Reed as new Academy Members.

278. DISCLOSURES OF INTEREST

The following declarations were received as interest:

- 1) Helen Williams and Ian Morrel, for agenda item 5 "Standing Item – DSG Growth Fund Allocations".
- 2) Ian Morrel and Trevor Loft, for agenda item 10 "Consultation on High Needs Block Funding Matters 2018/19".

279. MINUTES OF 20 SEPTEMBER 2017 & MATTERS ARISING

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

- **Item 270 SEND Review Consultation (page 97):** The Strategic Manager SEND reported that the feedback from the consultation is being considered and that further consultation would be launched shortly. This consultation is being aligned with the timetable for that on the District's Early Help Strategy. Responding to the question asked by the Chair, the Strategic Manager explained that no further information has been provided by the DfE on the position of wave 13 free schools.
- **Item 271 Secondary phase maternity de-delegation (page 99):** The agreed reimbursement using option 2 has been actioned.
- **Item 272 Real terms budget cost pressures (page 100):** An additional paper has been provided for members within the agenda pack giving a simple reminder / analysis of the real terms cost pressure context. It was explained that an understanding / awareness of this position is important in the Forum's discussions, over the next few meetings, on the allocation of the Schools Block headroom and the level at which the MFG is set.
- **Item 273 Formula Funding Arrangements (page 100):** 2 FFWG sessions were attended by members. Presentations have also been made to BPIP and the Secondary CEOs / headteachers as well as to the autumn term governor forums. It was also reported that the Authority has recently attended a regional finance officers meeting and gained some useful feedback from this a) on the view of other authorities in their movement towards national funding formula and b) the positions of High Needs Block pressure.

Other Matters Arising

- **October Census admissions:** The Business Advisor (Schools) explained In previous years we have reported to the Forum the number of children that were in the system but had not been allocated a place in a primary or secondary school before the October Census was taken. On a simple basis, we do not receive DSG funding for the children that are not placed by this time. It was reported that the



position has improved for October 2017. Of the 115 not on role for October 2017, remaining from 1,500 applications, 24 were in primary and 94 in secondary (of the 94: 55 were KS3 and 39 KS4). The DSG Schools Block cost of 115 pupils is c. £607k (£100k primary, £507k secondary). Admissions has analysed the reasons behind the 115. Forum Members agreed that it would be helpful to share this analysis.

- **Schools Forum operational guide:** The Business Advisor (Schools) reported that the DFE has updated its self assessment and good practice guidance for the operation of Schools Forums. This includes some simple tables, which set out the decision making powers of Schools Forums. It will be useful for Forum Members to have updated sight of this information and this will be circulated.

Resolved –

- (1) That progress made on “Action” items be noted.
- (2) That the minutes of 20 September 2017 be signed as a correct record.

ACTION: *City Solicitor*

280. MATTERS RAISED BY SCHOOLS

No resolution was passed on this item

281. STANDING ITEM – DSG GROWTH FUND ALLOCATIONS

The Business Advisor (Schools) presented a report, **Document HU**, which set out newly proposed allocations to schools and academies from the established DSG Schools Block Growth Fund. He explained that 2 allocations to primary and 9 to secondary schools and academies are proposed.

Forum Members did not ask any questions and did not comment further.

Resolved – That the Growth Fund allocations set out in Document HU be approved.

Action: *Business Advisor (Schools)*

282. NATIONAL FUNDING FORMULA ANNOUNCEMENT

The Business Advisor (Schools) presented a report, **Document HV**, which provided a briefing on the composition and implementation of the National Funding Formula written in response to the fuller announcement made by the DfE in September 2017. He explained that the immediate consequences for 2018/19 are further considered under agenda item 8.

Forum Members did not ask any questions and did not comment further.

Resolved – That the briefing be noted.

283. TEACHERS' PAY POLICY 2017

The Employee Relations Manager attended the Forum to explain the decision that is required to be taken by the Council regarding the discretionary element of the teacher's main pay scale award for 2017/18 and to collect the Forum's feedback on whether schools should be further surveyed before a final decision is taken.

He explained that the following recommendations were made in the STRB's report and were accepted by the Government:

- 2% uplift to the minimum and maximum of the main pay range (MPR);
- 1% uplift to the minima and maxima of the upper pay range (UPR), the unqualified teacher pay range and the leading practitioner pay range;
- 1% uplift to the minima and maxima of the leadership group pay range and all head teacher group pay ranges; and,
- 1% uplift to the minima and maxima of the Teaching and Learning Responsibility (TLR) and Special Educational Needs (SEN) allowance ranges.

However, there is also a discretionary element to this year's pay award of an additional 1% to all reference points within the MPR (other than the minimum and maximum) and this is left to local determination. There is no national recommendation either way on this discretionary element. It is for the Strategic Director, Children's Services to recommend and decide.

The Employee Relations Manager explained that the Teacher Trade Unions, including the NAHT, nationally have issued joint advice that the discretionary element should be paid and that they will only support Pay Policies that include this. Bradford Council has met with the local Trade Unions representatives to brief them on the above position and the Unions have reiterated this position. The Employee Relations Manager stated that 3 out of 4 regional authorities have already taken the decision to implement the discretionary 1%, with the other having not yet taken the decision but stating that it is minded to do so.

The Representative of the Teaching Trade Unions clarified that the Council's decision relates only to the Council's pay policy for teachers (in community and voluntary controlled schools). In this, the Unions would expect the Council to meet with the Unions through the established bargaining framework. Schools, where the governing body is the employer, and Academy Trusts are required to take their own decisions. He also stated that one of the strong arguments for implementing the discretionary element so that the construct of the MPS is retained, as most schools continue to use a points structure. He reported that all the individual employers of teachers in Bradford (41 in total) that the Unions have spoken to so far have said that they will be implementing 2% across the MPS.

The Strategic Director, Children's Services stated that the Council needs to ensure that Bradford remains competitive in its recruitment of high quality teachers. We also need to be very careful to avoid the possibility of equal value pay claims. These factors potentially lead us towards a decision to implement. However, it is understood that there will be immediate financial consequences for school budgets. The Strategic Director stated that he will take a decision quickly.



Forum Members expressed different views about whether a survey of schools should be taken before a final decision is made. The Forum's majority view was that a decision needs to be taken quickly and that a survey is not necessary. However, some Forum Members expressed concern about the implications for individual school budgets. One Member in particular asked for this to be recorded.

Resolved – That the Local Authority considers the advice of the Schools Forum (the feedback and views recorded in the minutes of the meeting) in its decision making on this matter.

Action: *HR Manager Employee Relations*

284. CONSULTATION ON THE PRIMARY AND SECONDARY SCHOOL FORMULAE 2018/19

The Business Advisor (schools) presented a report, **Document HW**, 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 2018/19 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 Business Advisor (Schools) explained the 6 key decisions that are set out in the document and what is proposed against each of these. These decisions frame the Forum's discussions over the next few meetings. He stressed the indicative nature of the modelling and that final 'affordability' would be confirmed following the release of the October 2017 census dataset in December.

The Business Advisor also explained that, following the writing of the consultation document, clarification had been received from the Education and Skills Funding Agency that authorities that wished to set a Minimum Funding Guarantee level higher than 0% (up to + 0.5%) could apply to the Secretary of State to do so. Gaining approval to do this did not commit us to funding a higher MFG but it would give us another option available in our allocation of the DSG next year. The Business Advisor stated that, on current data, the additional cost of a 0.5% MFG vs. 0% would be c. £1.01m (£0.77m primary and £0.24m secondary).

Forum Members made the following comments:

- That the position for schools under a minus 1.5% MFG will be dire especially in the context of possible release of public sector pay restraint during 2018/19. The MFG needs to be set at the maximum level possible.
- However, the option to use remaining primary-phase headroom within the Schools Block instead to support low-AEN schools with higher levels of SEND (by enhancing the SEN Funding Floor, as set out in the consultation) as an alternative to the MFG enhancement should be seriously considered. It was acknowledged that this latter approach will require the transfer of monies from the Schools Block to the High Needs Block (to fund additional expenditure, not to reduce cost pressure).

- The argument for moving to implement national funding formula locally in 2018/19 is quite compelling. The feedback from secondary phase headteachers / CEOs indicates that they are already supportive of this proposal.
- A further 'top-slice' from the Schools Block to support the High Needs Block in 2018/19 is very unlikely to be supported by schools. The transfer made in 2017/18 was to support the High Need Block strategically over the next 5 year period under national funding formula.

Resolved –

(1) That the consultation document (Document HW Appendix 1) be published.

(2) That requests ('disapplications') be submitted to the Secretary of State for permissions a) to set the Minimum Funding Guarantee (MFG) in 2018/19 above 0%, up to + 0.5%, b) to amend the calculation of the minimum per pupil funding floors in 2018/19 to remove the BSF / PFI factor and business rates, and c) to exclude the re-profiling element of the BSF / PFI factor from the calculation of the MFG / ceiling in 2018/19 so that this does not distort these calculations.

Action: *Business Advisor (Schools)*

285. CONSULTATION ON EARLY YEARS BLOCK FUNDING MATTERS 2018/19

The Business Advisor (Schools) presented a report, **Document HX**, which provided an update on Early Years DSG funding matters and the consultation document, proposed to be published, which sets out proposals for Bradford's Early Years Single Funding Formula for the 2018/19 financial year.

The Chair asked for confirmation of whether the protection for nursery schools is being funded at national or local level. The Business Advisor confirmed that this was a national-level protection, funded through a specific supplement within the Early Years Block, which was guaranteed by the DfE until the end of 2019/20.

Forum Members did not ask any further questions and agreed for the consultation document to be published.

Resolved – That the consultation document (Document HX Appendix 1) be published.

Action: *Business Advisor (Schools)*

286. CONSULTATION ON HIGH NEEDS BLOCK FUNDING MATTERS 2018/19

The Business Advisor (Schools) presented a report, **Document HY**, which asked Members to agree the publication of the proposed consultation document on the High Needs Block funding model for 2018/19. This includes sight of the estimated number of places the Authority expects to commission and the arrangements for paying top up (Plus Element) funding. In presenting the report, the Business Advisor highlighted the



benchmarking of top up rates and the proposal for the cessation of the funding of the top up associated with the placement of pupils without EHCPs in alternative provisions.

Within the subsequent discussion on the wider review of SEMH provision, the Chair asked for an update on the progress of the re-designation of 2 identified PRUs that are acting as special schools. The Strategic Manager, SEND, responded to explain that re-designation was not an easy process but that this will be achieved through academy conversion. This is currently being considered. The Vice Chair added that the consequential impact of this change on other provisions must be fully worked through. The Chair requested that a report on re-designation be presented to the next Forum meeting.

The representative of the PRUs emphasised that although the continued 'double funding' of placements is not appropriate a revised financial system must sustain high quality provision. He strongly recommends that the future financial system continues to operate through the BACs in collaboration rather than at individual school level. The Vice Chair confirmed that the wider SEMH review is looking at this. The Chair added that a full discussion is needed on growth in the number of permanent exclusions in the primary sector and exploration of the mechanisms that should be put in place, including the possible replication of the BACs and local agreements framework.

Resolved –

- (1) That the consultation document (Document HY Appendix 1) be published.**
- (2) That a report be provided to the next meeting, which enables the Schools Forum to further consider the options and implications for the re-designation of identified PRUs that are delivering SEND, rather than alternative, provision.**

Action: **Business Advisor (Schools)**

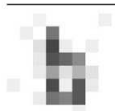
287. DSG CENTRAL ITEMS AND DE-DELEGATED FUNDS 2018/19

The Business Advisor (Schools) presented a report, **Document HZ**, which asked the Forum to consider the position of the funding of Central Schools, Schools and Early Years Block central items and de-delegated items funding within the DSG in 2018/19. In presenting, the Business Advisor highlighted the review of trade union facilities time and also the proposal to use the headroom within the newly created Central Schools Block to help relieve some of the pressure within the High Needs Block.

Resolved – That the information presented be noted at this stage. The Schools Forum did not identify additional areas of review and did not ask for any additional information.

288. SCHOOLS FORUM STANDING ITEMS

The Business Adviser (Schools) confirmed that there are 3 new academy representatives on the School Forum and that two primary schools converted to academy status on 1 October.



There was nothing to update further on the other standing items.

Resolved – That the information provided be noted.

289. AOB / FUTURE AGENDA ITEMS

The Vice Chair reminded the Forum of the request to capture information on the major non-DSG funding streams that are present in Bradford, including funding coming into the District through the Teaching Alliances.

Resolved – That further information be provided on additional grants of a significant value that are being allocated into the District, including to the Teaching School Alliances, to facilitate transparency and further consideration of the monitoring of how these grants are being effectively deployed.

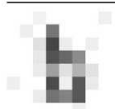
290. DATE OF NEXT MEETING

The next Forum meeting is scheduled for Wednesday 6 December 2017.

Please note that the July 2018 meeting has been rescheduled to Wednesday 11 July 2018.

These minutes are subject to approval as a correct record at the next meeting of the Schools Forum.
THESE MINUTES HAVE BEEN PRODUCED, WHEREVER POSSIBLE, ON RECYCLED PAPER

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Schools Forum – breakdown of 115 applications to be placed at October 2017 Census

Primary

BD10	5	Insufficient places, complex cases
BD15	1	Awaiting school response
BD12	1	Insufficient places
LS29	2	Complex cases, schools have issues with admitting
BD5	6	Three resolved but post census, insufficient places
BD3	1	CME - sibling place cannot be given at school, 4 over PAN in Yr grp
BD8	2	Awaiting school response
BD9	1	CME medical issues, lost appeal
BD4	2	Awaiting school response complex cases
Total	21	

Secondary

BD1	1	EHE returning Yr11 received just before census
BD2	2	Received just before census
BD3	22	11 require FAP Offers and 5 received just before census, 4 awaiting agreement from schools post FAP mtg, 2 awaiting response from school
BD4	2	Yr11 received just before census
BD5	17	6 received just before census, 8 to go to FAP or BAC OCT, 2 agreed post census
BD6	3	1 agreed post census, 1 YR11, 2 awaiting agreement from schools post FAP mtg
BD7	14	3 awaiting agreement from school post FAP mtg, 5 to go to FAP or BAC OCT, 6 no response from schools
BD8	15	9 required to go to FAP or BAC OCT, 6 no response from schools
BD9	12	2 offer post census, 4 awaiting agreement from schools post FAP mtg, 4 require FAP offer, 2 received just before census
BD10	2	EHE Yr 10 & 1 offered after census, 2 no FAP offer
BD12	1	Received just before census
BD15	1	Yr11 no response from school
BD21	2	1 FAP referred to BAC, 1 no response from school
Total	94	

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Schools forum powers and responsibilities

A summary of the powers and responsibilities of schools forums.

Function	Local authority	Schools forum	DfE role
Formula change (including redistributions)	Proposes and decides	Must be consulted (voting restrictions apply). See schools forum structure document that informs the governing bodies of all consultations	Checks for compliance with regulations
Movement of up to 0.5% from the schools block to other blocks	Proposes	Decides	Adjudicates where schools forum does not agree LA proposal
Contracts (where the LA is entering a contract to be funded from the schools budget)	Proposes at least one month prior to invitation to tender, the terms of any proposed contract	Gives a view and informs the governing bodies of all consultations	None
Financial issues relating to:	Consults annually	Gives a view and informs	None

Function	Local authority	Schools forum	DfE role
<ul style="list-style-type: none"> • arrangements for pupils with special educational needs, in particular the places to be commissioned by the LA and schools and the arrangements for paying top-up funding • arrangements for use of pupil referral units and the education of children otherwise than at school, in particular the places to be commissioned by the LA and schools and the arrangements for paying top-up funding • arrangements for early years provision • administration arrangements for the allocation of central government grants 		the governing bodies of all consultations	
Minimum funding guarantee (MFG)	Proposes any exclusions from MFG for application to DfE	Gives a view	Approval to application for exclusions
De-delegation for mainstream maintained schools for: <ul style="list-style-type: none"> • contingencies • administration of free school meals 	Proposes	Maintained primary and secondary school member representatives will decide for their phase. Middle schools are treated according to their deemed	Will adjudicate where schools forum does not agree LA proposal

Function	Local authority	Schools forum	DfE role
<ul style="list-style-type: none"> insurance licences/subscriptions staff costs – supply cover support for minority ethnic pupils/underachieving groups behaviour support services library and museum services School improvement 		status	
<p>General Duties for maintained schools</p> <ul style="list-style-type: none"> Contribution to responsibilities that local authorities hold for maintained schools (please see operational guide for more information) 	Proposes	Would be decided by the relevant maintained school members (primary, secondary, special and PRU).	Adjudicates where schools forum does not agree LA proposal
<p>Central spend on and the criteria for allocating funding from:</p> <ul style="list-style-type: none"> funding for significant pre-16 pupil growth, including new schools set up to meet basic need, whether maintained or academy 	Proposes	Decides	Adjudicates where schools forum does not agree LA proposal

Function	Local authority	Schools forum	DfE role
<ul style="list-style-type: none"> funding for good or outstanding schools with falling rolls where growth in pupil numbers is expected within three years 			
<p>Central spend on:</p> <ul style="list-style-type: none"> early years block provision funding to enable all schools to meet the infant class size requirement back-pay for equal pay claims remission of boarding fees at maintained schools and academies places in independent schools for non-SEN pupils admissions servicing of schools forum Contribution to responsibilities that local authorities hold for all schools 	Proposes	Decides	Adjudicates where schools forum does not agree LA proposal
<p>Central spend on:</p> <ul style="list-style-type: none"> capital expenditure funded from revenue: projects must have been planned and decided on prior to April 2013 so no new projects can be charged 	Proposes up to the value committed in the previous financial year and where expenditure has already been committed.	Decides for each line	Adjudicates where schools forum does not agree LA proposal

Function	Local authority	Schools forum	DfE role
<ul style="list-style-type: none"> contribution to combined budgets: this is where the schools forum agreed prior to April 2013 a contribution from the schools budget to services which would otherwise be funded from other sources existing termination of employment costs (costs for specific individuals must have been approved prior to April 2013 so no new redundancy costs can be charged) prudential borrowing costs – the commitment must have been approved prior to April 2013 	See table four page 31 to 35 for Information on historic commitments. Read establishing local authority DSG baselines for more information.		
Central spend on: <ul style="list-style-type: none"> high needs block provision central licences negotiated by the Secretary of State 	Decides	None, but good practice to inform forum	None
Carry forward a deficit on central expenditure to the next year to be funded from the schools budget	Proposes	Decides	Adjudicates where schools forum does not agree LA proposal
Any brought forward deficit on de-delegated services which is to be met by the overall schools budget.	Proposes	Decides	Adjudicates where schools forum does not agree LA proposal

Function	Local authority	Schools forum	DfE role
Scheme of financial management changes	Proposes and consults the governing body and Head of every school	Approves (schools members only)	Adjudicates where schools forum does not agree LA proposal
Membership: length of office of members	Decides	None (but good practice would suggest that they gave a view)	None
Voting procedures	None	Determine voting procedures	None
Chair of schools forum	Facilitates	Elects (may not be an elected member of the Council or officer)	None

Autumn Term 2017 Consultations on 2018/19 Arrangements - Combined Responses Analysis

Primary & Secondary Schools Block

Question	Strongly Agree	On Balance Agree	Strongly Disagree	Total No. of Responses to this Question	% Strongly Agree	% On Balance Agree	% Strongly Disagree
1. Do you agree with the proposal to 'move to National Funding Formula' at April 2018 *	17	3	2	22	77%	14%	9%
2. Do you agree with earmarking Schools Block funding on a phase-specific basis?	19	2	0	21	90%	10%	0%
3. Do you agree with the proposal to set the Minimum Funding Guarantee at 0% in 2018/19, subject to final affordability?	20	1	1	22	91%	5%	5%
4. Do you agree with the proposal to set the Ceiling at + 3% per pupil in 2018/19, subject to final affordability?	18	2	1	21	86%	10%	5%
5. Do you agree with the proposal to seek to fully implement the DfE's minimum per pupil funding floors in 2018/19, subject to final affordability?	15	4	1	20	75%	20%	5%
6. Do you agree with the proposal, currently in outline, to earmark unallocated primary phase Schools Block monies to support SEND costs in primary schools and academies (by enhancing the SEN Floor), understanding that this will require the transfer of these monies to the High Needs Block?	3	17	0	20	15%	85%	0%
8: Do you agree with the proposal to continue with our current definition of notional SEN where we move to National Funding Formula?	13	5	2	20	65%	25%	10%
9: Do you agree with the proposal to protect SEN Floor allocations for individual schools and academies in 2018/19 at least at their 2017/18 values?	16	4	0	20	80%	20%	0%
10. Do you agree with the proposal to continue the approaches to the factors currently outside the scope of the National Funding Formula as set out (split sites, pupil mobility, business rates, Growth Funding, BSF DSG affordability gap)?	17	3	0	20	85%	15%	0%
12. Do you agree with the proposed criteria and methodology for the allocation of the growth funding to schools and academies in 2018/19?	14	5	1	20	70%	25%	5%
13. Do you agree with the centrally managed funds, and their criteria, that are proposed to be held in the DSG in 2018/19?	12	6	1	19	63%	32%	5%

* please note this analysis includes the joint response from the Bradford East One Partnership as 1 score of 'strongly disagree'

Responses to Question 11 - Should we continue to de-delegate for the following purposes:

	YES	NO
FSM Eligibility Assessments	18	
Fischer Family Trust - School Licences	16	2
School Maternity / Paternity 'insurance'	16	3
Trade Union Facilities Time	17	1
Trade Union Health and Safety Rep Time	17	2
School Staff Public Duties and Suspensions Fund	18	1

Early Years Single Funding Formula

Question	Strongly Agree	On Balance Agree	Strongly Disagree	Total No. of Responses to this Question	% Strongly Agree	% On Balance Agree	% Strongly Disagree
1. Do you agree with the proposal to retain the single funding rate value for all providers for the 2 year old entitlement set at the value the DfE funds Bradford's Early Years Block (which in 2017/18 was £5.20 per hour)?	8	2	0	10	80%	20%	0%
2. Do you agree with the proposal to move to a monthly 'starters and leavers' based counting arrangement from 1 April 2018 for all entitlements?	1	7	4	12	8%	58%	33%
3. Do you agree with the proposed approach to the calculation of monthly payments, and adjustments, as set out in this Technical Statement?	4	5	3	12	33%	42%	25%
5. Do you agree with the proposal to seek to retain the universal base rate funding values in 2018/19 that were published in the Authority's consultation in autumn 2016, incorporating the allocation of some Early Years Block DSG reserves?	8	0	2	10	80%	0%	20%
7. Do you agree with the proposal to seek to hold Early Years Block reserve so that we can retain the base rate funding value in 2019/20 that was published in the Authority's consultation in autumn 2016 (£4.11), rather than allocate all reserve into the 2018/9 EYSFF?	7	3	1	11	64%	27%	9%
8. Do you agree with the proposal to continue our current Deprivation and SEN supplement factor in 2018/19 set to allocate 9.5% of the EYSFF?	10	1	0	11	91%	9%	0%
9. Do you agree with the proposal not to add any further supplements into the Early Years Single Funding Formula in 2018/19?	3	6	0	9	33%	67%	0%

PTO

High Needs

Question	Strongly Agree	On Balance Agree	Strongly Disagree	Total No. of Responses to this Question	% Strongly Agree	% On Balance Agree	% Strongly Disagree
1. Would you support a reduction, up to a maximum of 1.5%, in the values of the Plus Funding rates, as part of the suite of measures implemented to balance the High Needs Block spending in 2018/19?	1	6	0	7	14%	86%	0%
3. Do you agree with the proposal to continue to use the existing Ranges Model framework (as shown in Appendix 1) as the basis for the calculation of the pupil-led need 'Plus' funding element for the 2018/19 financial year?	0	5	1	6	0%	83%	17%
4. Do you agree with the proposal to allow the increase in NFF Additional Educational Needs allocations to uplift the value of 'notional SEN' funding identified for individual schools and academies?	2	3	2	7	29%	43%	29%
5. Do you agree with the proposal to protect in 2018/19 the values of SEN Floor allocations for schools and academies currently in receipt of this funding at their 2017/18 levels?	1	4	0	5	20%	80%	0%
6. Do you agree with the proposal to cease, from September 2018, the HNB's double funding of the cost of the placement of pupils in alternative provision settings without EHCPs that remain on the roll of the mainstream school?	2	3	1	6	33%	50%	17%
7. Do you agree with the proposal to fully implement Bradford's Place-Plus model for the funding of Early Years resourced provisions from April 2018?	0	1	0	1	0%	100%	0%

Autumn 2017 Consultations – Combined Responses Analysis (Presented to the Schools Forum 6 December 2017)

This report provides the comments, which have accompanied responses to the autumn 2017 consultations. These have been copied verbatim where possible. Please note that responses that set out specific matters relating to an individual identifiable setting have been adjusted so that the comment can be presented to a public meeting.

Primary & Secondary Schools Block

Question 7: Do you have any comments or feedback you wish to be taken into consideration on the position of the High Needs Block in 2018/19 and the relationship with mainstream formula funding?

- “It is evident that further discussions / routes may need to be formulated and that the Schools Forum will have to make decisions on the future structures / provision. Being able to see the feedback as this evolves is important.”
- “HNB funding needs to come through quicker to Primary Schools, it currently takes too long for the EHCP/funding to be put in place. We currently put a lot of time, effort and provisions in place whilst pupils are being assessed and by the time the plan is in place the child either moves on to a special school or secondary school. We don’t get any funds for the provisions we have had to make during the assessment period (which can go on for months).”
- “A review of funding between provisions at KS3 and KS4 needs to address how funds follow pupils but funding increased to meet the individual learning needs presented: e.g. a mainstream pupil, non-EHCP who moves in to Alternative Provision needs additional funds which needs to be a transitional fund; there has to be a mechanism of central banking between mainstream and alternative provision settings so monies move with the pupil out of mainstream and in to specialist and then back again if an assessment proves a higher level of need is identified.

Additional comments:

- Reference question 1:
 - “If it is set fairly with tapering adjustments in the early days of NFF.”
 - “In response to your consultation on the implementation of the NFF, I have been asked as Chair of the Bradford East One Partnership (BEOP) to respond on behalf of the twelve member schools. The majority view is that the NFF should not be implemented in April 2018 as there is no imperative to do this and that Bradford schools should continue with the formula as it is until it is absolutely necessary to change.
 - “The Schools Forum have effectively advised and supported Primary and Secondary schools’ representatives in the decision-making process over the last two years with regard to the inevitability of the NFF; it is advisable to move to the system as soon as possible to take full account of the impact before statutory implementation.”
- Reference question 2:
 - “Only if the split of allocations between Primary and secondary can be deemed to be fair by the majority.”

- Reference question 3:
 - “The schools that will benefit from this decision are the schools that are being funded excessively more than their counterparts and are continuing to be funded above the National Formula. If there is sufficient affordability to set the MFG at 0% would it not be fairer to put these available funds into the Pupil Base rate where ALL schools will benefit.”
- Reference question 4:
 - “The reservation I have with this would be the case whereby a school’s intake has changed to the point whereby they might attract more than 3% which would constitute a real need for the extra funding. The affordability of this needs to be considered and may need a transitional arrangement.”
 - “If a decision is made to introduce the NFF in 18/19, ahead of the required government timeline of 19/20, I believe the ceiling should be lower (say 1.5%) and additional funding is therefore, available to cushion the loss of income for 1 year before the NFF has to be officially introduced.”
 - “As the NFF is implemented there will be need to monitor impact on funding schools that increase funds due to the £4,800 minimum as well as increased pupil intake which may take some schools over a 3% cap; the funding needs to follow the pupil however this has to be subject to affordability for 2018/19 and consideration given to transitional arrangements on a bespoke basis to achieve the NFF by 2019/20.”
- Reference question 5:
 - “This should be phased in over the two year period. Schools are being informed that they should receive a certain lower limit per pupil but this figure has in itself no real basis in fact and they have managed at a lower level for a number of years.”
 - “If this is how NFF is to be calculated in the future then it would seem appropriate to move to this, although it could initially be reduced to the interim £4,600 for secondary schools to support the MFG if necessary. It does, however, throw up some anomalies in terms of fair funding, particularly in terms of ‘notional SEN’ and the £4,800 per pupil proposed can in some ways be misleading as it represents an average and not an individual specific amount.”
- Reference question 6:
 - “Only if this is done within the Primary Sector funds and does not impact on the Ring Fenced Secondary Block as discussed in question 2.”
 - “Yes but we’d also like you to consider if this would be better placed in provisioning school to school support. We would also like to suggest that a ‘central team’ of experts across various disciplines with recent school experience would be of benefit to the district’s schools, if tasked with helping schools in difficulties with pre-planned support packages for areas of need – i.e. a full set of school policies or intervention strategies.”

- Reference question 8:
 - “Notional SEN calculations adds no value at all to the details provided to schools and Academies. It attempts to suggest that establishments receive more than the £6,000 per pupil in their base budgets. It serves no real purpose.”
 - “As mentioned in our High Needs consultation response, we have concerns about the number of identified and ring fenced funds we have to report on given we have some immutable core costs. We are concerned that there is so much funding becoming identified for specific uses within the delegated budget, we are at risk of either ‘double counting’ or not fulfilling our duties according to each area’s permitted spend – or alternatively not having enough unidentified funding to cover our day to day needs and normal salary expectations. An increased notional SEN makes this more likely to happen, especially in schools with low prior attainment and we would not like to see the trend develop much further as we may begin to struggle to justify paying for essentials for the school.”
 - “The concern here is that the use of the term “notional” gives rise to different points of view:
 1. Funding is in place for SEND pupils in school at a level to meet their needs when;
 2. In practice the funding does not meet needs in a mainstream setting as there is the need for mainstream teaching and specialist SEND support in a mainstream setting;
 3. That notional funding is defined as being the funding specifically for all SEND pupils in a school.”
- Reference question 9:
 - “Protect to avoid unnecessary turbulence over the next two years but not enhance.”
- Reference question 10:
 - “Certain costs cannot be avoided. In the case of PFI Schools, they suffer from having no chance of achieving Best Value and VFM in either the Affordability Gap or the Unitary Charge. This can represent a substantial amount of the budget for which there is no flexibility.”
 - “The Unitary Charge and the Affordability Gap should both be protected in the formula for PFI Schools. In the main, they have no option but to pay the bills but have no chance to seek Best Value or VFM in these areas even though they represent a large share of the School Budget. “
 - “Yes in principle I agree with this so long as the BSF DSG affordability gap never impacts on the school and any associated direct expenditure that the school incurs e.g. Unitary Charge is controlled in an agreed manner.”
 - “As long as though there is no risk that any proportion of the BSF DSG Affordability Gap gets directly allocated to schools and that the Unitary Charge is controlled in an agreed manner.”
- Reference question 11:
 - “Could the LA set up possible providers and ask annually which schools and Academies wish to participate in the following year or years?”

- “FSM Eligibility assessments – this would be helpful if continued centrally as it would be more difficult and time consuming for individual schools and delays will impact on the students.”
- “We also provide time for union staff working in school, so we have some concerns about the level of this support for Trade Union Facilities time. We may consider a lower level, and it will be interesting to see what the current review finds before a recommendation is made. Unless lower funding levels can be agreed we will be unable to commit to supporting the facilities time under the current financial climate. We previously welcomed the various union H&S inspections in school, which often involved 2 or 3 reps twice a year. However, we have not now had any union H&S rep in school since February 2016, so do not support this payment.”
- “FSM Eligibility should be apportion by current FSM pupil numbers, per school (not ever 6 numbers).”
- “The de-delegation of ESD School Support Team, is not in your list, but we do not agree with the de-delegation of this funding. Schools using this service should buy in direct.”
- Reference question 12:
 - “Planned Expansions and Bulge classes are fine but New Expansions should be excluded on the basis they should be planned and what are Diseconomies of Scale?”
 - “We would like to see further guarantees for schools who agree to expand but find that following expansion the places they have created are not entirely filled. A half filled additional class only attracts 50% of the anticipated formula funding and this can cause significant harm to a school budget and forward planning. A full time teacher and resources will have already been allocated – there is around a 6 month lead time for the recruitment of teachers for September; at the point where it becomes apparent a new class will not be filled it is usually far too late to take action to reduce costs. In these very specific circumstances we would like to see the Local Authority guarantee to ‘top up’ the funding to the full number of places planned if they themselves have requested the increase.”
 - “Further considerations needs to be given to schools expanding to .5 FE. During the expansion, every other year we are underfunded and at the end of the expansion programme we will be underfunded. There are 7 levels from Reception to Y6 and therefore, even by mixing year groups at the end of the process there is one year group with 2.5 classes which needs 3 teachers, but basically we are funded for 2.5 teachers.”
- Reference question 13:
 - “This looks like another contingency fund. Who decides the allocation and what happens to funds not spent in Year?”
 - “If these are by agreement and within reasonable limits and do not materially detract from Direct School Funding.”
 - “Funding the deficits left by other schools when they convert to academies is an issue that we would like to raise as a cause for concern. We realise that this is not currently a large sum but can see in the current circumstances that it could grow.”

- “These need to be carefully monitored and accounted for to ensure there is not a growth in centralisation that is at odds with Schools Block and HNB funding of school and setting based roles and responsibilities.”

Early Years Single Funding Formula

Question 4 – Do you have any comments on how we could improve the proposed arrangements, including where our guidance could be clearer?

- “There will be 12 adjustments to reconcile instead of 3. There are likely to be issues with cash flow / sustainability as you have identified in your document. How do we account for children who leave part way through the month? Does the system allow us to enter both term time and stretched funding? How do we stretch funding for the year, if we have no security that the fees will be paid for the following term? This system leaves nurseries very vulnerable, if grant funding is not reconfirmed, there is a short lead time to resell the reserved place which will lead to some under occupancy which is of course unsustainable. My fees are worked out over 12 equal payments, how will this work if you are calculating figures on actual days in the month?”
- “If you are going to insist on monthly reporting, then could that be fed into the current system to achieve a smoothed out payment cycle?”
- “It will be helpful to have a training session on the new system and also some clarification on the paperwork required. For example, will parents have to sign the Carer/Parent agreement each month to confirm their continued claim?”
- “We would benefit from a new ready reckoner to ensure that we have a strong idea of the direction funding will take as we submit our data, especially if this will continue to be calculated termly. As it is possible there will be greater fluctuations than on current termly census returns which can be calculated with a high degree of surety, we’d also like to suggest that spring term is paid in February with a top up/reduction for one month in March as this might help smooth any problems associated with year end.”

Question 6 – Do you have any comments on this estimated universal base rate?

- “The base rate and deprivation rate do not currently cover my current costs, and it is due to reduce again. It is misleading to continue to tell parents that their childcare is “free”. We are allowed to charge for additional items, and this amount will have to increase dramatically to ensure sustainability.”
- “It is far too low, though that is the fault of the DfE, not BMDC. The base rate needs to be a minimum of £4.70/hr if the quality of childcare is to be maintained and the delivery of free hours to remain truly free.”
- “We understand that with cost pressures and the NFF that this must reduce, however, agree that it should be a staggered reduction rather than a steep drop.”
- “AS the PSLA and NDNA predicted this year large numbers of PVI are closing due to the financial pressures. The smaller settings are losing out in more ways with increases of costs etc. Profit margins will start to go negative and thus companies will fail the “To make a Profit” test and those which are not for profit will fail due to negative trading.”

- “As advised at the business planning seminars in the Summer, we have based our financial planning on the estimated universal base rate so it would be helpful if the proposed level were retained rather than increased slightly in 2018/19 only to be reduced further again in 2019/20.”
- “I was not aware that the £4.11 funding level for 2019/20 was in jeopardy and could fall to around £4.00 per hour. We’ve based our financial planning on the £4.11 figure and a reduction to this would have a very serious impact on our financial viability. It will be really helpful to have an update on the funding rate for 2019/20 as soon as possible and also the likely funding rate for 2020/21 so that we can incorporate these in our planning.”
- “We believe the universal base rate is much too low due to the need to provide a qualified teacher in a maintained setting coupled with mandatory ratios of staff to children – this simply will not cover salaries for us. We could make this work if the nursery was led by a skilled lead practitioner but are not currently able to use this model as a permanent solution, unlike PVI providers. We can see that there is potential for all maintained schools to independently arrive at the conclusion that they cannot afford to run a nursery at this rate almost simultaneously, which would potentially decimate early education in Bradford and lead to a very sudden and severe shortage of maintained nursery places.”

Question 10 – Are there any changes that you would like to see made to the Early Years Single Funding Formula in 2018/19 that have not been proposed?

- “Providers to receive immediate confirmation from HMRC when a parent has reconfirmed their entitlement, so we have positive feedback that the system is working. We can be proactive in approaching parents if they have not reconfirmed, instead of trying to ask them all as now. Hopefully this would reduce some of the uncertainty and time spent chasing the families who pay our wages.”

Additional comments:

- Reference question 1:
 - “If you want the 2 year old offer to continue, it must be funded appropriately.”
 - “Potentially needs to be higher due to cost pressures, however understand the rationale and in line with other changes to funding in Bradford (Children Centres) it is difficult to pose an argument for loss of funding.”
 - “If you can afford to increase 2yo funding why decrease 3/4 year olds. Are they less worthy? I understand the ratio changes but the older children eat more, use more resources.”
- Reference question 2:
 - “This sounds as if it should be simpler, but it is an increasing workload on the setting. I do not employ anyone to do my admin, so this places an extra burden on me. I must be available every month end to ensure the paperwork is correct. Schools have terms and therefore holidays, nurseries do not and the pressures continue everyday. I have concerns re sickness and holiday continuity should I be absent for any reason. What happens if I miss a deadline?”
 - “We have very few in-term changes though, while this system records these more quickly, for us it is outweighed by the additional work necessary to make monthly returns.”

- “I think the monthly-based system will be fairer than the one-day only headcount system but am concerned about the increased administrative time needed to input the information on a monthly basis.”
- “It will penalise Nurseries that do a staggered start (normally over 5 days). This staggered start is for the benefit of the children. Full staffing and resources are required.”
- “Disadvantage school settings with term time only provision that could be less than 190 days – larger drop in funding.”
- “As a school we understand the rationale in terms of the 30H funding and starters and leavers. However, the system will reduce the possibility for centres (due to cost pressures) to have a period of staggered starts and this throws 2 and 3YO children right into the setting at the start of the year which does not account for their wellbeing and may reduce numbers. Additionally, the monthly intake for 3YO’s does not allow for a meaningful consistent educational offer for the children. Therefore, we disagree on educational grounds.”
- “How will it work without causing lots of extra work? It not only is it an extra job each month it means if a child leaves mid month we lose out on funding and in reality you do not always fill the gap instantly.”
- “Only concern is based around those PVI which are Term based only – as their costs do not match a 12 month basis. Those of us open 50-52 weeks it makes sense although unsure on how the funding example will work IF we are entering stretched hours over the 12 months?”
- Reference question 3:
 - “We are forever checking payments and adjustments.”
 - “It is a question of cashflow for small businesses. In order to deliver the free hours, we have to employ suitable staff who must be paid each and every month. The present system helps to smooth this out. Under the new one, it appears that in e.g. September, there will be no payments at all for the children who come for free hours only because they will not be attending in August when the schools are closed. In order to counteract this, we would need to change the claim pattern of virtually all parents. I accept that we shall receive the correct amounts overall, of course.”
 - “The cashflow difficulties likely from your proposed to change to monthly reporting are very real. You have moved from paying termly in advance to monthly in advance and now you are proposing to pay monthly in arrears. Whilst clearly being beneficial to BMDC’s cashflow, this is likely to create very real difficulties at the receiving end for small businesses.” *A number of responses cited concerns about cash flow*
 - “The system will increase the administrative needs of the centre. Potentially with this additional need and cost implications of the new system it may result in setting abandoning the 2YO and 3YO educational offer, which is not as yet a statutory requirement and is already difficult in terms of administration and attendance of children.” *A number of responses cited concerns about administration.*
- Reference question 5:
 - “Reserves should be a priority to ensure that the centre has a sustainable amount of money.”

- “I would have preferred it all to be allocated to 2018-19 to better cushion the downward transition from the rates for 2017-18.”
- “With a 10% reduction in funding – and the NMW/LW & Pension increases due in April unsure HOW this will be met by the providers when the schools are still so extra funded compared to the PVI/Childminders? Could be met with even high closure of smaller providers and reduction in offer of places? This may possibly hit the district in terms of sufficiency – in particular the 30hrs offer as this will take funding significantly below the cost of delivery!”
- “Any chance that Business Rates can be addressed for Childcare providers, as a relief for this negative funding arrangement, if not for 18/19 then more so for the 19/20 year.”

High Needs

Question 2: 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 2018/19 (listed in Appendix 2)?

- “That is a meteoric rise in planned numbers. If money is diverted from schools and the places do not materialise, what assurances will schools receive that the funding will be revised annually in light of actual placements and not just lost in the system.”
- “Some settings have greater financial impact than others. The key to ensuring the balance of the system is to have rigorous monitoring of funding and its impact on individual settings and the outcomes for pupils in these settings.”
- “We would ask that the definition of some schools as Pupil Referral Units is considered, as the amount of pupils with Social, Emotional and Mental Health difficulties would suggest that in reality these are special schools.”

Additional comments:

- Reference question 1:
 - “Any reduction is difficult for schools and may result in less support for an individual student, particularly as labour costs and therefore the cost of alternative provision / additional support are likely to rise.”
 - “Agree in principle as a measure to support the sustainability of the High Needs Funding Block but realise that the amount of impact between schools will be variable with some schools having a more significant financial impact than others. The principle of individual cut for sustainability of the greater programme is important here. Schools have been well informed that reduction in funding and the imperative to monitor, over the last two years, its potential impact on future staffing levels and provision.”
 - “We agree with the reduction under the current set of circumstances but would like to add the comment that the values set already do not fully cover the needs of the pupils stated within the EHCP, even with the £6,000 within formula funding, and this will continue to be a concern.”

- Reference question 3:
 - “How many schools/places are funded at each Range and how many places are actually taken up as part of the process.”
 - “Yes – but it seems that having ranges that do not attract funding and others that give nominal amounts when the narrative for the need indicates a much higher intervention highlights that the descriptive of the ranges may need to be reviewed.”
 - “In principle I agree with a Range Model but question the low-level of funding at Range 4a; there is a need to do a wider analysis and series of audits to understand the impact of this system in Primary settings and the effect on Secondary settings and the acceleration of EHCP and the need to access a higher Range of Funding to meet identified need. More rigorous assessment of need is required to ensure funding is understood to be at the appropriate level to meet the agreed level of need; this requires a review of the Range Descriptors.”
- Reference question 4:
 - “This will be seen as additional funding for schools whereas this is clearly not the case.”
 - “Our notional SEN would increase although our funding will not increase. If we have to account for notional SEN separately then this would effectively mean a reduction in the general school budget. If the low attainment portion remains at 100%, the portions of other factors could be reduced (particularly on the base app) as SEN need should be reflected in the Low Attainment figure and additional support for FSM comes in the form of Pupil Premium. It will be challenging (if not impossible) to allocate the value of notional SEN to students with SEN, especially as the changes to funding from the High Needs Block will mean that financial pressures on schools looking to access alternative provision will be substantially increased. We understand that this calculation is not nationally recognised by the DfE, so presumably may be altered, although the DfE are reviewing to put something in place. If this is a Bradford calculation then presumably was designed with the current factors in place to achieve an appropriate outcome amount. As the factor amounts are changing then really the calculation formula should change in order to maintain an appropriate level of notional SEN and reduce the significant impact on the basic educational funding for all, which is already under pressure.”
 - “By its very nature, ‘notional SEN’ funding is just that and in essence is a meaningless calculation. Increasing it only gives the impression that it provides any purpose.”
 - “It can be administratively difficult for schools to maintain thorough records across Pupil Premium, PE grant and other funding sources when they are placed within the delegated budget. Around 85% of a primary school’s expenditure can be on salaries, and we have unavoidable running costs relating to building maintenance and operational running such as electricity. We are concerned that there is so much funding becoming identified for specific uses within the delegated budget, we are at risk of either ‘double counting’ or not fulfilling our duties according to each area’s permitted spend – or alternatively not having enough unidentified funding to cover our day to day needs and normal salary expectations. An increased notional SEN makes this more likely to happen, especially in schools with low prior attainment and we would not like to see the trend develop much further as we may begin to struggle to justify paying for essentials for the school.”

- Reference question 5:
 - “It would be unfair not to allocate some level of protection to schools during the transition period.”
 - “If there is an unknown impact that ripples out to compromising funding in other areas this may be a cause for concern.”
 - “I strongly agree in the principle to protect individual schools but am wary of the longer term impact on the Schools Block if savings are needed to be made in 2018/19.”
- Reference question 6:
 - “On balance agree, however, this places an additional burden on the centres in terms of administration and will be seen as an additional cost to schools that place children in the centres, basically as they will now see a ‘cash’ payment going out to the centre. Additionally, with the lack of a fee for permanently excluding a child in Primary Schools, this action may result in a rise in the numbers of permanently excluded children, due to the cost implications to schools who would have normally placed a child in a centre.”
 - “This will put more pressure on our budget and it is very difficult to get an EHCP in place. Placements can be for a short period of time and therefore do not necessarily have an equivalent saving in school costs. If the percentage of our funding to be allocated as notional SEN is to be increased, then the argument will be that we have funds to cover these costs, although we are not actually receiving the level of additional funding in line with the increased notional SEN. There is an anomaly here as well regarding schools with a DSP. The students in the DSP will now be included in the S251 pupil numbers and will therefore, in addition to the base app, receive an element of notional SEN. As these students are likely to be low attainers, then they will attract additional funding in the S251 in addition to the proposed £6,000 per pupil for the DSP place plus any top-up funding. This is in effect double funding the £6k element of DSP places.”
 - “As this is under discussion the papers that will be generated for the future funding would better inform the direction that this will head towards.”
 - “No agreement has yet been reached in discussion with the BACs to pay the actual top up required to place students. A formal binding agreement must be reached with the BACs and additionally there is considerable additional risk where top up has to be retrieved from over 30 different Secondary Schools that may be part of various different Academy Chains and forming a single agreement across the three BACs may present some difficulties.”
 - “Any other proposed cuts as part of a broader reform may require significant lead in time as a full restructure of staffing may be required.”
 - “Currently all students that attend come off the previous school roll. There would be significant difficulties calculating the off roll date against the schools census dates and as the schools will be funding the Top Up in the future essentially this eliminates the need to calculate any double funding for individual students and schools.”

- “I agree with a complete revision of provision across the Bradford District to ensure, there is in place the most effective provision that meets the needs of our most challenging and often most vulnerable pupils; double funding should not be allowed – I am not sure there is a situation currently of double funding – I feel it is more about the need to have funding following the pupil from a Primary or Secondary setting into specialist provision so there is parity of funding following the pupil and identified supplementary funding to meet their needs. The aspect I strongly disagree with is the decision to remove any financial support for non-EHCP pupils from September 2018 without being clear about the level of provision to support these pupils to avoid a potential increase in Permanent Exclusions; we have to remember, there is an agreement in principle to pay a disincentive of £6,500 to £8,000 for Managed Moves and Permanent Exclusions but no legal obligation on schools to pay this. Currently, the system across Bradford has a number of “blockages” to be able to meet the needs of pupils and allow for successful reintegration to mainstream settings.”
- “Although we recognise the double funding problem, we would comment that there are still on-going costs at the original school. As the child is still on roll, it is likely we would need to maintain the possibility of one to one support. In addition, the mainstream school is responsible for paying for transport to the alternative provision, which can add up to a considerable cost. If the ‘double funding’ is to cease, we would like some guidance on total package costs including transport to the alternative provision and whose responsibility this would become. We are concerned that this could become a disproportionate financial burden on the maintained school although we support the need for the alternative provision to remain financially viable.”

- Reference Question 9:

- “It is important (especially for the individual students) that where an EHCP is needed to be put in place it happens in a timely fashion and the support from the LA is put in place to achieve this.”
- “There is some concern that, alongside the cost pressures, the changing landscape across the LA from the development of various MATs is resulting in a more fragmented approach to high needs across the district and is also likely to affect the operation of the BACs.”
- “We still experience some time delay in the provision of EHCPs for younger children at the beginning of primary school, and would like to see some resource invested into turning these around faster or clearing a back log of cases so children and schools can identify help required as early as possible. We are still experiencing situations where a child needs one to one provision for their own safety but there is no EHCP in place for a considerable amount of time after entry to school. If this is not possible, a backdated payment from the High Needs Block from the point where the child joined the mainstream setting would also be very helpful and would help schools resource these areas more thoroughly at point of entry. Currently, we have limited scope for very young children with complex needs because we have to find provision from the main school budget, along with the knowledge that we will only get the top up funding we need at the point the EHCP is finalised.”

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SCHOOLS FORUM AGENDA ITEM

For Action

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For Information

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

To provide members with an update on the forecasted spending positions of centrally managed and de-delegated funds held within the DSG in 2017/18. This document gives members a view of the estimated value of one off monies that will be available to add to the 2018/19 DSG Headroom and provides a view of the uses of this funding.

Date (s) of any Previous Discussion at the Forum

The 2017/18 funds were agreed by the Schools Forum as part of the recommendations on the allocation of the DSG in the meetings of January 2017. An interim update of the spending position in this year was provided in July, where the Forum was notified of an expected £2.048m of available 'uncommitted' one off monies resulting from the reconciliation of the 2016/17 closedown position (£0.698m Schools Block and £1.35m Early Years Block).

Background / Context

It is usual for underspends to be created within the DSG allocation process. This is because certain expenditure is estimated at the start of the year and the Forum has always taken a prudent approach to managing cost pressures. A normal part of the DSG allocation process then in previous years has been a reconciliation of planned vs. actual spending. Any balance from the net position of over / under spends has been added to the DSG headroom, to be spent on a one off basis in the following year. This funding is available on a one off basis only. When previously considering such funds, the Forum has sought to avoid allocating this to meet ongoing expenditure. This paper now provides an updated view on the value of balances available by individual expenditure line.

In line with the Forum's discussion and recommendations made in January 2017, the High Needs Block 'reserve' should be viewed as a transition fund to enable the successful delivery of structural change.

Details of the Item for Consideration

2017/18 DSG Forecasted Spending Position

Appendix 1 shows spending to date, and forecasted further spending / estimated position at the end of the 2017/18 financial year, of DSG centrally managed funds. Further explanation of some of the key lines will be given verbally at the meeting. We estimate that at 31 March 2018 the DSG will have underspent cumulatively in total by £7.930m. Please note that the £7.930m figure is estimated at this stage. The reconciliation of funds, as part of the year end closedown process in April / May 2018, will confirm the value of balances and this will be reported to the Forum. For reference, we estimated in December 2016 that a sum of £5.80m would remain at 31 March 2017. As reported in July 2017, the confirmed balance was £7.85m (a difference of £2.05m of which £0.70m relates to the Schools Block and £1.35m to the Early Years Block). £7.93m is c. 1.5% of the current annual DSG allocation.

For the first time, forecasted DSG unspent balances are separated into the 4 Blocks structure, rather than being shown as a single figure. The Blocks breakdown is shown at the top of Appendix 2. DSG reserves can be used across all Blocks. In practical terms however, under National Funding Formula, it is now useful for the DSG's 'reserves and underspends' to be presented on a Block-specific basis. This is also specifically necessary following our establishment of the principle of ring-fencing of the Early Years Block. The starting assumption will now be that the reserve attributed to each Block is spent on pressures within that Block unless a specific decision is taken to transfer reserves between Blocks. To stress, the DSG Regulations permit reserves to be used across all the Blocks. What we are establishing here is a locally determined informal Block ring-fencing policy for reserves. The £7.930m splits by Block as follows:

- Schools Block £4.78m
- Early Years Block £1.52m
- High Needs Block £1.63m
- Central Schools Block £0.00m

Please note that no reserve is currently attached to the Central Schools Block as this is a newly established Block at 1 April 2018.

Details of the Item for Consideration

As shown in Appendix 2, against this £7.930m balance:

Schools Block (£4.775m)

- A figure of £0.091m related to de-delegated funds held across the financial year. Any overspending of de-delegated funds is managed through adjustment of the subsequent year's de-delegation value. As such, the £0.091m is not a permanent call on DSG reserves.
- £0.716m relating to Growth Fund provision; £0.228m of this is carried forward from 2017/18 Growth Fund resource (as required by Regulations) and the remaining £0.488m is proposed to be held to support the cost of implicit growth of new free school provision.
- £0.650m previously set aside by the Schools Forum to support the cost of the deficit of a secondary school at the point it converts to academy status. This school has not yet converted. The £0.650m is expected to be retained at this stage.
- £2.340m provides for the anticipated cost of the remaining 4 years of financial Growth Fund support for Beckfoot Upper Heaton Academy, following the model agreed with the Schools Forum. This provision is split into an estimated cost in 2018/19 (£0.55m) and provision to be retained for the final 3 years (£1.790m).
- A balance of £0.978m reserve, which includes items previously discussed (under negotiation) by the Schools Forum.

Early Years Block (£1.52m)

- A sum of £0.61m to be used to deliver a protected 3 & 4 year old setting base rate through the 2018/19 EYSFF as proposed within the Authority's consultation (to retain the base rate for PVI providers and nursery classes at £4.12 per hour). Please note that the actual cost to one off monies will be influenced by the actual number of hours delivered during 2018/19. As such, the cost to one off monies of this policy is currently estimated.
- A sum of £0.61m earmarked to be used to deliver a protected 3 & 4 year old setting base rate through the 2019/20 EYSFF as proposed within the Authority's consultation (to retain the base rate for PVI providers and nursery classes at £4.11 per hour). Please note that the actual cost to one off monies will be influenced by the actual number of hours delivered during 2019/20. As such, the cost to one off monies of this policy is currently estimated. Please also note that the viability of continued protection in 2019/20 will depend on the value of one off monies remaining within the Early Years Block at the end of 2018/19.
- A balance of £0.30m reserve.

High Needs Block (£1.63m)

- A minimum sum of £0.521m proposed to continue to be allocated to support the 2018/19 High Needs Block budget. £0.521m is a continuation of the sum of one off monies deployed within the 'option 4' solution agreed by the Schools Forum for the balancing of the 2017/18 DSG.
- The deployment of further sums of High Needs Block transition one off monies (from the remaining balance of £1.11m) into the 2018/19 DSG is one of the key matters to be further considered by the Schools Forum in making its recommendations for 2018/19.

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

These balances represent unallocated resources, which must be spent on DSG functions and in accordance with the Regulations.

Recommendations

The Forum is asked to consider & to note the information provided, Members are also asked to consider whether sufficient information has been provided to enable final recommendations to be made on 10 January 2018 on the use of one off monies.

List of Supporting Appendices / Papers *(where applicable)*

Appendix 1 – Update on DSG Funds 2017/18

Appendix 2 – Statement of Estimated One-Off Monies and Possible / Proposed Uses

Contact Officer *(name, telephone number and email address)*

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FUND NAME	2017/18 DSG Value (including any one off sums)	Spend to Date (to end October 2017)	Further Committed Spend before 31 March 2018	Further Forecasted Spend to 31 March 2018 Not Yet Committed	Adjustment for in Year Changes to Academy Recoupment	Total Forecasted Spend up to 31 March 2018	Forecasted Balance at 31 March 2018	Comments
Centrally Managed Funds								
Schools Forum Costs	10,000	5,000	0	5,000		10,000	0	May have a small underspend, subject to cost of meetings December - March
Admissions	577,600		577,600			577,600	0	Fully spent (agreed Schools Forum DSG spend on admissions capacity)
DSG Matched Contribution to School Improvement	458,305		458,305			458,305	0	Fully spent (agreed Schools Forum DSG contribution to Council capacity)
DSG (former ESG) Centrally Retained Duties	1,331,086		1,331,086			1,331,086	0	Fully spent (agreed Schools Forum DSG contribution to Council capacity)
Maintained De-Delegated Funds (excluding income from buy in)								
Brought Forward Balance of De-delegated Funds held from 2016/17	-101,197					0	-101,197	Balance held across 2017/18 financial year end close - allocated to the balances of the de-delegated fund lines below
ESBD School Support Team (Primary)		203,307	145,219	0	-30,358	378,885	-30,358	Final balance including income to be held into 2018/19 (separate decisions on 2018/19 funds in January)
FSM Eligibility Assessment	79,938	46,631	33,308	0	-5,886	85,824	-5,886	Final balance including income to be held into 2018/19 (separate decisions on 2018/19 funds in January)
Fischer Family Trust Licences	33,560	33,560	0	0	-2,923	36,483	-2,923	Balance to be held into 2018/19 (separate decisions on 2018/19 funds in January)
School Maternity / Paternity 'insurance' fund	1,838,489	632,095	1,206,394	0	-121,981	1,960,470	-121,981	Balance to be held into 2018/19 (separate decisions on 2018/19 funds in January)
Trade Union Facilities Time (excluding income from buy in)	229,359	133,793	95,566	0	-15,218	244,576	-15,218	Final balance including income to be held into 2018/19 (separate decisions on 2018/19 funds in January)
Trade Union Health & Safety Representative Time (excluding income from buy in)	35,048	20,445	14,603	0	-2,325	37,374	-2,325	Final balance including income to be held into 2018/19 (separate decisions on 2018/19 funds in January)
School Staff Public Duties and Suspensions Fund	40,040	0	0	40,040	-3,190	43,231	-3,190	Balance to be held into 2018/19 (separate decisions on 2018/19 funds in January)
Other Schools & Early Blocks Centrally Managed Funds								
Growth Fund - existing permanent expansions	922,581	922,581	0	0		922,581	0	Expenditure was known in January 2017
Growth Fund - in year permanent expansions	980,000	509,501	0	0		509,501	470,499	Underspend is returned to the ISB or held in reserve for original purpose in 2018/19
Growth Fund - Existing bulge classes	211,580	211,580	0	0		211,580	0	Expenditure was known in January 2017
Growth Fund - Financial Support for Beckfoot Upper Heaton Academy	1,937,849	548,238	0	0		548,238	1,389,611	2017/18 is the third year of support as agreed with the Schools Forum; the unspent balance is committed to future years
Exceptional Unforeseen Costs "Exceptional Circumstances" & Schools in Financial Difficulty	100,000	31,750	0	0	-8,710	40,460	59,540	Final balance to be held into 2018/19 (separate decisions on 2018/19 funds in January)
Additional Costs Associated with New, Re-Org & Closing Schools - Safeguarded Salaries	199,324	49,324	0	0	-17,094	66,419	132,905	Final balance to be held into 2018/19 (separate decisions on 2018/19 funds in January)
Net saving in the ISB as a result of academy conversions (business rates savings)	0	-190,671	0	0		-190,671	190,671	Cost of business rates in academies is roughly 20% that of community and VC schools. Conversions up to 1 October included in this figure.
Position of the Business Rates Account 2017/18 (estimates of cost were used in S251 budgets)	268,317	0	0	112,505		112,505	155,812	Position to be confirmed following year end reconciliation.
Existing provision for the deficit of closing school (converting Academy)	650,000	0	0	0		0	650,000	The school has not yet converted to academy status. This sum is still to be retained.
Specific Early Years Block Funds								
Early Years Single Funding Formula Adjustments	200,000					0	200,000	Allocated to EYSFF cost in 2017/18
Early Years Disability Access Funds	179,600	49,200	130,400	0		179,600	0	Specific pupil-led allocations; expected to be fully spent. Revised DSG allocation of £179,600.
Early Years Pupil Premium	491,315	231,535	259,780	0		491,315	0	Specific pupil-led allocations; expect this year's allocation to be fully spent. Balance comes from previous years. Revised DSG allocation of £491,315
Cost of EYSFF 3/4 Year Olds	31,920,708		32,050,885			32,050,885	-130,176	Estimated cost of the EYSFF allocations; still based on a forecast of actual cost in spring 2018
Cost of EYSFF 2 Year Olds	8,924,998		9,640,617			9,640,617	-715,619	Estimated cost of the EYSFF allocations; still based on a forecast of actual cost in spring 2018; includes £210k places development spend
2 Year Olds Funds unspent balance (one off monies) from 2016/17 year end	500,000					0	500,000	Held to support base rate protection in 2018/19 as agreed Schools Forum January 2017
DSG 2017/18 Allocation Adjustment (incorporating 2016/17 Early Years Block DSG confirmation)			-318,970			-318,970	318,970	July 2017 confirmed value (with EY estimates for January 2018); linked to underspends in the EYB
High Needs Block Variable Funds								
Place Plus - Special Schools	18,132,531		18,302,893			18,302,893	-170,361	Final 2017/18 Cost TBC - estimate is based on profile up to November 2017
Place-Plus - PRUs	6,448,548		6,863,734			6,863,734	-415,185	Final 2017/18 Cost TBC - estimate is based on profile up to November 2017
Place-Plus - Primary Behaviour Centres	833,861		864,444			864,444	-30,583	Final 2017/18 Cost TBC - estimate is based on profile up to November 2017
Place-Plus - DSPs	2,785,577		3,011,920			3,011,920	-226,343	Final 2017/18 Cost TBC - estimate is based on profile up to November 2017
Place-Plus - Further Education (Post 16)	2,600,000		2,408,231			2,408,231	191,769	Final 2017/18 Cost TBC - estimate is based on profile up to November 2017
Place-Plus - Early Years Childrens Centre Plus	1,058,597		1,058,597			1,058,597	0	Final 2017/18 Cost TBC - estimate is based on profile up to November 2017
Place-Plus - Mainstream Schools & Academies	4,449,674		5,093,712			5,093,712	-644,037	Final 2017/18 Cost TBC - estimate is based on profile up to November 2017
Place-Plus - Hearing / Visually Impaired Services (ARCs and Central)	3,794,377		3,723,713			3,723,713	70,664	Final 2017/18 Cost TBC - estimate is based on profile up to November 2017
Place-Plus - Education in Hospital, Tracks and Home Tuition	1,644,000		1,844,000			1,844,000	-200,000	Final 2017/18 Cost TBC - estimate is based on profile up to November 2017
HNB Additional Places Provision	4,203,000					0	4,203,000	Allocated within HNB Place-Plus costs above (with balance moving to HNB reserve)
Secondary funds for additional PRU Places (one off monies)	253,000	253,000	0	0		253,000	0	Released for spending across 2017/18. Fully spent
Specialist Equipment	100,000		100,000			100,000	0	Expect full spend
Early Years Inclusion (EYIP for Early Years SEND)	600,000		300,000			300,000	300,000	Spend within EYB (3&4 EYSFF)
Speech & Language Therapy Services	140,000		140,000			140,000	0	Expect full spend
Cost of OLA, Independent & Non Maintained Placements	6,580,000		7,000,000			7,000,000	-420,000	Final 2017/18 Cost TBC - estimate is based on profile up to November 2017 (this is a volatile budget)
DSG allocation adjustment relating to the High Needs Block	0		-396,000			-396,000	396,000	Additional income related to NMSS / FE exceptional places adjustments
Adjustment for further recoupment from High Needs Block for special school academy conversions	0		1,423,658			1,423,658	-1,423,658	Where the EFA funds places for academies directly (this would otherwise have been spend against maintained special schools)
Other Funds / Costs / Savings								
Joint Improvement Investment Fund (one off monies) BEICB	509,720	509,720	0	0		509,720	0	Now fully allocated 2017/18.
DSG Resilience Uncommitted Reserve	1,311,203					0	1,311,203	Carried forward. This is the £1.754m minus £0.521m (option 4), net of some smaller adjustments e.g. for Copyright Licensing actual cost
Building Schools For the Future (DSG Affordability Gap)	6,607,720	6,607,720	0	0		6,607,720	0	Final cost may vary slightly from this (RPIX reconciliation)
TOTAL BALANCE OF FUNDS 2017/18							5,881,603	
ADDITIONAL UNALLOCATED BALANCE AVAILABLE FROM 31 MARCH 2017 RECONCILIATION REPORT TO THE SCHOOLS FORUM JULY 2017 (SCHOOLS BLOCK)							698,000	
ADDITIONAL UNALLOCATED BALANCE AVAILABLE FROM 31 MARCH 2017 RECONCILIATION REPORT TO THE SCHOOLS FORUM JULY 2017 (EARLY YEARS BLOCK)							1,350,000	
ESTIMATED TOTAL DSG UNDERSPEND / BALANCE AT THE END OF THE 2017/18 FINANCIAL YEAR							7,929,603	
DSG Balance split by Block (Ring-Fencing)								
<i>Schools Block</i>							4,775,163	
<i>High Needs Block</i>							1,631,266	
<i>Early Years Block</i>							1,523,175	

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	Schools Block	Early Years Block	High Needs Block	Central Schools Block	Total	Comments
Total Balance (by Block) forecasted to be held at 31 March 2018	4,775,163	1,523,175	1,631,266	0	7,929,603	Balances are "ring-fenced" by Block
<i>Balance as a % of Block value</i>	<i>1.1%</i>	<i>3.5%</i>	<i>2.5%</i>	<i>0.0%</i>	<i>1.5%</i>	

1) Proposed to be allocated into the 2018/19 Schools Budget for Specific Additional Expenditure

Beckfoot Upper Heaton Diseconomies Funding estimated allocation 2018/19	550,000				550,000	Original Agreement January 2015. 18/19 is 4th year of support
To protect (uplift) the value of 3&4 Year Old Base Rates in 2018/19 - estimated cost		608,529			608,529	As proposed within EYSFF consultation autumn 2017
Total Proposed to be allocated into the 2018/19 Schools Budget for Specific Additional Expenditure	550,000	608,529	0	0	1,158,529	

2) Proposed to be allocated to Balance the Block in 2018/19

Minimum Support for the High Needs Block allocation 2018/19			520,788		520,788	Continuation of the value of one off monies used in 17/18 option 4
Total Proposed to be allocated to Balance the Block in 2018/19	0	0	520,788	0	520,788	

3) Proposed to be Retained (not allocated in 2018/19) - Mostly Committed

Carry over of De-Delegated Funds Balances (maintained schools only)	90,634				90,634	Balances of Funds are managed separately
Beckfoot Upper Heaton Diseconomies Funding allocations (future years)	1,789,611				1,789,611	3 more financial years; £550k annual estimated cost
Deficit of a Secondary School converting to Academy Status not yet allocated	650,000				650,000	Original Agreement January 2015
Retention of Growth Fund Balances plus reserve to support Growth Fund Cost from April 2019	716,295				716,295	To support implicit cost (inc. new free schools) from 2019/20
To protect (uplift) the value of 3&4 Year Old Base Rates in 2019/20 - estimated cost		608,529			608,529	As proposed within EYSFF consultation autumn 2017
High Needs Block transition			1,110,478		1,110,478	Earmarked for enabling HNB structural reform
Block Reserve	978,623	306,116			1,284,739	Includes items under negotiation
Total Proposed to be Retained (not allocated in 2018/19) - Mostly Committed	4,225,163	914,645	1,110,478	0	6,250,286	
<i>Retained Balance as a % of Block value</i>	<i>1.0%</i>	<i>2.1%</i>	<i>1.7%</i>	<i>0.0%</i>	<i>1.2%</i>	

GRAND TOTAL BY BLOCK	4,775,163	1,523,175	1,631,266	0	7,929,603	
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2018/19 Planned Dedicated Schools Grant (DSG) Income and Expenditure Summary					
	Schools Block	High Needs Block	Early Years Block	Central Schools Block	Total DSG
A) ESTIMATED 2018/19 DSG ALLOCATION <i>(before academy recoupment and other EFA direct funding adjustments)</i>	415,716,942	65,647,032	43,738,475	2,854,504	527,956,952
<i>% of total DSG by Block</i>	<i>78.7%</i>	<i>12.4%</i>	<i>8.3%</i>	<i>0.5%</i>	
B) 2017/18 DSG ALLOCATION <i>(Re-baselined and adjusted for DfE National Funding Formula movements)</i>	406,793,610	63,840,110	42,710,076	2,772,446	516,116,242
C) Difference in DSG (growth) A - B <i>(positive = income increase)</i>	8,923,332	1,806,922	1,028,399	82,058	11,840,710
D) PLANNED DSG EXPENDITURE 2018/19 <i>(excluding items funded by reserve / one off monies)</i>	414,946,942	67,775,543	44,347,185	2,854,504	529,924,173
E) TOTAL PRESSURE IN 2018/19 A - D <i>(negative = overspend)</i>	770,000	-2,128,511	-608,710	0	-1,967,221
F) PRESSURE CARRIED FORWARD FROM 2017/18 PLANNED BUDGET	0	-520,788	0	0	-520,788
G) NEW / CHANGE IN PRESSURE BETWEEN 2018/19 AND 2017/18 <i>(negative = overspend)</i>	770,000	-1,607,723	-608,710	0	-1,446,433
H) PROPOSED ALLOCATION OF DSG RESERVE (ONE OFF MONIES) IN 2018/19	0	520,788	608,710	0	1,129,498
I) FINAL POSITION OF THE DSG BY BLOCK IN 2018/19 AFTER INITIAL RESERVE G - H <i>(negative = overspend)</i>	770,000	-1,607,723	0	0	-837,723

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SCHOOLS FORUM AGENDA ITEM

For Action

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For Information

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

To provide the Schools Forum with an update on the 2018/19 DSG, in advance of the formal announcement by the Government expected later in December and the Forum being asked to make final recommendations on its allocation on 10 January 2018.

Date (s) of any Previous Discussion at the Forum

The DSG's position in 2018/19 has begun to be considered within the National Funding Formula and formula funding consultation items discussed in recent meetings.

Background / Context

Our DSG allocation in 2018/19 will be split into 4 blocks (in size order):

- Schools Block – funding Primary & Secondary school and academy formula allocations, School Block delegated items (maintained schools) and Growth Funding. c. £416m
- High Needs Block – funding provision for children with needs valued at greater than £10,000 per annum, including Special schools, PRUs and Post 16 students in Further Education Colleges as well as support services. c. £66m
- Early Years Block – funding the Early Years Single Funding Formula and centrally managed items relating to early years provision (the 2, 3 and 4 year old entitlements). c. £44m
- Central Schools Block – a newly established block at April 2018, which incorporates items previously funded via 'topslice' within the Schools Block, including admissions, copyright licensing and statutory duties (transferred from ESG). The establishment of this block ceases topslicing by establishing the funding of legitimate central functions on a specific formula basis. c. £3m

As presented in previous reports, each of these Blocks now has a National Funding Formula (NFF) basis, which includes transition and damping as the DSG system moves towards the fuller implementation of NFF. 2018/19 is the first year of implementation of the NFF distribution under damped arrangements.

Many aspects of the DSG for 2018/19 have already been confirmed and will now not change. However, there are still some critical elements that will be confirmed by Government later in December and some that will be confirmed during 2018/19, including Early Years Block funding and adjustments to the High Needs Block for imports and exports between authorities. A more detailed analysis of the 2018/19 DSG position as this is currently known / predicted will be provided for the Schools Forum on 10 January.

In the recommendations made for 2017/18, the Schools Forum established the principle of 'ring-fencing' of the Early Years Block, meaning that the spending pressures / funding adjustments relating to this block are contained within it i.e. if funding goes down, spending goes down. The Authority assumes that the Schools Forum, in its management of the DSG going forward, will wish to extend this principle across all 4 Blocks, certainly in 2018/19. As set out in Document IA, the Authority also assumes that block ring-fencing will be applied, informally, to the management of reserves / one off monies.

For reference, the Schools Block is formally ring-fenced in Regulations. From April 2018, authorities are permitted to transfer a maximum of 0.5% of the Schools Block to the High Needs Block, with the approval of the Schools Forum. Larger transfers must be approved by the Secretary of State. This means that 99.5% of Schools Block monies must be spent on Schools Block activities. The Regulations also require a pass through of 95% of the Early Years Block 3 & 4 year old funding to the funding rates for 3 & 4 year old providers. This has the effect of limiting the size of centrally managed budgets within the Early Years Block as well as restricting the value of the EYB that could be transferred to other blocks. There are no formal 'ring-fencing' restrictions set in the Regulations for the Central Schools Block or the High Needs Block.

Additional reports to this meeting provide more details of the management of spending within each of the blocks based the establishment of block ring-fencing. We will make a set of decisions within each block that are required in order either to allocate headroom or to balance overspending. These decisions include the strategic use of DSG reserves.

Details of the Item for Consideration

Appendix 1 provides a high level position statement of the 2018/19 DSG based on current forecasts. As stated earlier in this report, there are a number of aspects of the DSG that are still to be confirmed. One of these is the cost of Schools Block formula funding using the October 2017 Census dataset. As such Members are asked to view this summary with caution.

Appendix 1 shows the position of the DSG by block:

- Before the Schools Forum makes a recommendation on the allocation of the headroom within the Schools Block. This is further discussed in Document IC. It is assumed simply that the Forum will make a series of recommendations that will fully spend the Schools Block on Schools Block activities. It is also assumed that adjustments will be made to ensure that this block does not over spend.
- Applying the principle of ring-fencing to the Early Years Block, including the proposal to allocate EYB reserve to protect 3 & 4 year old funding base rates in 2018/19 (therefore, balancing the overspending that this protection produces).
- Allocating the Central Schools Block, and the headroom within this block, as set out in Document IG, including transferring £0.48m of current High Needs Block spending activity into the Central Schools Block in 2018/19.
- Before identified 'mitigating activity' is included in the forecasted High Needs Block spending position. The Authority expects that the focus of the Forum's discussion will be on the High Needs Block. The forecast is shown in this way to highlight the budget risk within the High Needs Block. Please see below.

High Needs Block – 2018/19

Appendix 1 identifies a forecasted potential overspending of £2.13m in the High Needs Block in 2018/19. £0.512m of pressure is carried over from 2017/18 (Members will recall that within the option 4 solution for the DSG in 2017/18 was the use of £0.521m of DSG reserve). Within the £2.13m forecast it is assumed that:

- Additional places are delivered and funded as set out in Document IE and are 100% occupied. The total additional forecasted spend on places, compared against the planned 2017/18 budget, across all provisions and including the cost of EHCPs in mainstream schools and OLA placements, is £4.7m. £1.8m of this is the forecasted increase in the cost of EHCPs in mainstream primary and secondary schools and academies. The remaining £3m relates to additional places in high needs providers (175 18/19 academic year). The 2018/19 High Needs Block finances, on a full year equivalent basis, 313 of the additional 450 SEND and SEMH places the Authority has set out to create as discussed with the Forum.
- £0.48m of central activities that are currently funded by the High Needs Block but that can legitimately be funded from the Central Schools Block are transferred to the Central Schools Block, as set out in Document IG.
- That the cost of the Early Years Inclusion budget is transferred to the Early Years Block, reducing the High Needs Block's spending by £0.3m. This is more than counter balanced by additional spending on early years SEND provision within the High Needs Block (including an additional £0.6m spend on early years DSP places).
- The SEND review (of teaching support services) impacts on the High Needs Block from 1 September 2018 (part year impact). A further presentation on this will be made on 10 January.
- That the High Needs Block ceases to fund the double-funded Plus element for non-EHCP placements in the primary behaviour centres and Bradford Central PRU from 1 September 2018 (part year impact), reducing spending by c. £0.5m in 2018/19.
- That the values of Plus funding allocated by the Ranges Model are reduced by 1.5%, reducing spending by c. £0.3m in 2018/19.

It is then assumed:

- That the Schools Forum will not recommend a further contribution, by top-slice, from the Schools Block in 2018/19 to meet High Needs Block pressures. This is a clear steer that has come from previous discussion in the Forum as well as from feedback to our consultations. Members will be aware that decisions around the allocation of the High Needs Block, such as the removal of double funding of the non-EHCP placement Plus element in alternative provisions, place new spending pressure on primary and secondary delegated budgets and have the effect of transferring responsibility from the High Needs Block to the Schools Block.
- As an initial measure, that £0.512m of High Needs Block transition fund would continue to be allocated into the 2018/19 position, to reduce the forecasted over spending to £1.61m.

Details of the Item for Consideration

spending can change during the year. In thinking about how to address a £1.61m over spending forecasted at this stage, Members should be aware of the following factors, which may / are likely to reduce this forecasted over spending:

- That the planned High Needs Block budget assumes that places will be 100% occupied. In reality, as occupancy fluctuates during the year, it is anticipated that the actual cost of the Plus element (top up element) will be reduced on the planned budget provision. It is difficult at this stage however, to quantify this and it is prudent to not assume that this reduction will be realised.
- That the planned High Needs Block budget includes unallocated provision of £0.75m for costs that may not be incurred where the Authority is able to take further action to avoid the growth of spending pressure within home tuition provision and placements in OLA and independent provisions.
- That the Authority is currently working with the SEMH review group, as well as the BACs, to redesign the secondary SEMH continuum of provision, incorporating both Bradford Central and Bradford District PRUs, with the stated outcome of ceasing the High Needs Block's funding of the Plus element for non-EHCP placements in District PRU from September 2018. The successful delivery of this will reduce High Needs Block spending by £0.6m in 2018/19 (a part year reduction).
- In addition, the Authority forecasts that a further £1.11m of High Needs Block transition fund will be available to support the 2018/19 budget in addition to the £0.521m already allocated.

Understanding the steer from the Schools Forum and schools, the Authority must look to balance pressures by delivering significant structural solutions within the High Needs Block, allied with the targeted use of the High Needs Block transition fund in the short term as well as using the Early Years Block and the Central Schools Block where the Regulations allow this. The sum of this activity, if successfully delivered, currently is anticipated to be sufficient to balance the High Needs Block in 2018/19 to the extent that the total cumulative budget position, including reserves, will not be in deficit at the end of 2018/19. However, there is significant risk within this forecast. It may also be the case that the majority of the High Needs Block's transition fund will need to be deployed in 2018/19 in order to achieve this. The position of the High Needs Block will be closely monitored and will need to be regularly considered by the Schools Forum during 2018/19. An end of year conversation may need to be had where the High Needs Block is in deficit.

High Needs Block – Trajectory from April 2019

The Authority's forecast, based on current information, indicates that 2018/19 is a bulge year in terms of cost pressure within the High Needs Block. This is because it is the only first year of NFF formula increase and the structural changes to spending being proposed and delivered by the Authority will only have part year affect.

The budget position for 2019/20, 2020/21 and 2021/22 is currently forecasted to significantly improve, to the extent that so long as planned structural change is delivered, alongside other already identified actions such as the re-designation of 2 PRUs to special schools, the High Needs Block will broadly balance as a stand alone budget. However, this trajectory is based on estimates of spending in volatile areas, including OLA placements and also makes big assumptions about the establishment of new free school provision. The budget trajectory modelling certainly confirms the necessity for the successful delivery of significant structural change in SEND and alternative provision as well as the success of the District's early help strategy. It also indicates the necessity for a continued control of the value of the 'top up' allocated by our High Needs Block ranges model.

The budget position after 2021/22 appears to be very challenging and it is at this point that we must see the release of the remaining £7.5m HNB funding that the NFF calculates that we should receive.

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

As outlined in this paper.

Recommendations

Members are asked to consider the information presented in the report, in advance of making final recommendations on 10 January 2018.

List of Supporting Appendices / Papers (where applicable)

Appendix 1 – 2018/19 Indicative DSG Summary

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SCHOOLS FORUM AGENDA ITEM

For Action

☐

For Information

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

This report asks the Forum to consider the outcomes of the consultation on Schools Block formula funding, which was agreed at the last meeting. The report also includes further information on the options for the Schools Block headroom. Please note that an appendix to Document IC will be tabled at the meeting as it contains the outcome of a consultation period, which concludes on 4 December.

Date (s) of any Previous Discussion at the Forum

The consultation document was presented to the Schools Forum meeting 18 October 2017.

Background / Context

The consultation document, presented to the Schools Forum at the last meeting, outlined the Authority's proposals against the 6 key decisions that are required to set Bradford's 2018/19 mainstream primary and secondary funding formula arrangements. These decisions are:

1. Whether we now use the National Funding Formula locally for the calculation of our primary (reception to year 6) and secondary (pre 16) school and academy budget shares from April 2018, or whether we stick to our current formula, or whether we do something in between or in transition leading up to hard NFF at April 2020.
2. The value of Minimum Funding Guarantee we provide in 2018/19. The Government permits this to be set between 0% and minus 1.5%. 0% means that a school that has the same pupil numbers recorded in October 2017 as in October 2016 will receive the same core formula funding in 2018/19 as they received in 2017/18.
3. The value of the ceiling we adopt, which will cap increases for schools and academies that may be gaining from the 2018/19 formula funding approach and / or NFF.
4. The extent to which we begin transition to, or fully implement, the DfE's new £3,500 (primary), £4,800 (secondary) and £4,042 (all-through) minimum per pupil funding floors that are contained within the final NFF.
5. How we allocate any Schools Block headroom that remains from the difference between the national minimum 0.5% per pupil increase 'in respect of every school', that has been allocated into the Schools Block, and a maximum MFG level set at 0%.
6. How we balance the High Needs Block where the NFF settlement for this Block may not be sufficient to meet spending demand due to NFF damping and transition.

Appendix 1 provides a summary of the Authority's proposals for reference.

The consultation also set out the proposals for the continuation of centrally managed funds, including Growth Funding. These are discussed in more detail in document IG.

The Schools Forum agreed for the proposed 'disapplication' requests to be submitted to the Secretary of State as recorded in the minutes of the October meeting. These included the option for the Minimum Funding Guarantee for primary and secondary schools to be set higher than 0% up to a maximum of + 0.5% per pupil. Due to the numbers of requests being made, the Secretary of State announced on 23 November a regulations change permitting authorities to set an MFG up to + 0.5% without disapplication. The option for the delivery of a higher MFG comes into consideration of proposals under decision no. 5 above.

Alongside the publication of the consultation documents and modelling School Funding Team has delivered 2 roadshows for schools and has also attended BPIP, a secondary headteachers / CEOs meeting, the autumn terms governor forums and the primary and secondary business manager forums.

Details of the Item for Consideration

Consultation Responses

Appendix 2 (to be tabled at the meeting) will provide an analysis of the formal responses received to the consultation. Members are encouraged to present to the meeting their feedback from their discussions with school colleagues.

Members are asked to consider whether any of the proposals should be amended in the light of feedback and / or whether further information is required in order for the Schools Forum to make its recommendations, on 10 January 2018, on the primary & secondary mainstream formula for 2018/19.

Schools Block Headroom

Current modelling, using the October 2016 Census dataset, as presented to the last meeting and within the consultation document, based on current proposals, indicates that there may be unallocated headroom within the Schools Block. This primarily is primary-phase headroom; the secondary phase Schools Block allocation is fully spent.

Under both Bradford's current formula and NFF, the vast majority of primary schools and academies are funded on the MFG. Under 2018/19 Regulations as they currently stand, the best formula funding settlement that can be provided for these schools from the Schools Block is 0% (same allocation in 2018/19 as 2017/18 where pupil numbers are the same). This means that, for the primary phase, there is the potential, subject to the cost of formula funding using the October 2017 Census dataset, for there to be money unallocated within the Schools Block, because the DfE has allocated 0.5% per pupil into the Schools Block in respect of these schools. The position of the secondary phase is somewhat different, as 2/3rds of schools and academies are above the MFG.

Understanding that the position and value of this headroom will change when the cost of formula funding for 2018/19 is confirmed using the October 2017 Census dataset, the Schools Forum was asked to begin to consider how this headroom should be allocated. There are 2 clear options:

- a) Pending Secretary of State approval, or the amendment of the Regulations, to allocate the headroom by setting the MFG above 0% up to + 0.5%. The MFG value must be the same for both the primary and secondary phases, meaning that there may be an implication for the full affordability of the NFF proposals and the full implication of the DfE's minimum per pupil in the secondary phase where the secondary-phase Schools Block budget must incorporate the cost of a + 0.5% MFG. A third of secondary schools would benefit from a higher MFG.
- b) Retain the MFG at 0% and instead transfer the primary-phase headroom to the High Needs Block to enhance the value of funding allocated to the primary phase through the SEN Funding Floor mechanism. This is the option that was set out in the consultation document. The SEN Floor mechanism targets additional High Needs Block funding to low AEN high EHCP schools and academies. The Authority already proposes to protect allocations for schools and academies in 2018/19 at 2017/18 levels. The primary headroom could be used to further enhance this funding. This would only be a temporary, possibly one off, arrangement and to go ahead will require specific agreement by the Schools Forum for the transfer of Schools Block monies to the High Needs Block. However, to be clear, this transfer will be to enable additional spending in support of SEND in the primary phase, not to act as a contribution to general cost pressures within the High Needs Block. As the modelling currently suggests that there isn't Schools Block headroom within the secondary phase, this option does not currently appear to be available to the secondary phase.

Behind these options is the basic premise that the headroom within the Schools Block will be ring-fenced on a phase specific basis. This is a principle that we set out in the consultation document.

Appendix 3 gives sight of the potential impact of the 2 options:

Option A: enhance the value of the MFG up to 0.5% for both primary and secondary phases.

Option B: enhance the value of the SEN Funding Floor for the primary phase.

The modelling clearly shows the difference in the distribution of the headroom between these options. Members are asked to consider which of these options would be preferred. A final recommendation will need to be made on 10 January.

Please note that the value of MFG under option A / the value of enhancement to the SEN Funding Floor under option B will be influenced by the cost of formula funding using the October 2017 Census dataset. Forum Members will be presented with this in January.

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

As set out in Document IB (DSG update). It is expected that the Schools Block allocation will balance as close as possible on a phase-led basis e.g. the primary phase Schools Block cost will match the primary phase Schools Block allocation.

Recommendations

The Forum is asked to consider the outcomes of the consultation and whether any of the proposals should be changed in the light of responses. Schools Members will be asked to make final recommendations on the structure of the formulae, and the criteria for the allocation of Schools Block funds, on 10 January 2018. As such, Members are asked to consider whether sufficient information has now been provided to enable these final recommendations to be made.

List of Supporting Appendices / Papers (where applicable)

Appendix 1 – Primary and Secondary 2018/19 Formula Arrangements Consultation – Summary
Appendix 2 – Consultation Responses Analysis (to be tabled at the meeting)
Appendix 3 – Primary Schools Block headroom options analysis

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Decision 1 – Whether to move to NFF at April 2018

- **The Authority proposes to ‘move to NFF’ at April 2018**, thereby using NFF to calculate individual formula funding budget shares for both the primary and secondary phases instead of using our current local formula.
- By ‘move to NFF’ we mean to replicate the NFF at individual school level as closely as possible within the constraints of a) the 2018/19 Finance Regulations and b) affordability within Bradford’s 2018/19 DSG envelope. Where the cost of formula funding for 2018/19 increases due to changes in the October 2017 Census dataset, to the extent that the Schools Block will be overspent if the NFF is fully implemented, the Authority will discuss the options for addressing this with the Schools Forum and will ask the Schools Forum for a recommendation on this matter in January 2018. This may mean that certain aspects of the NFF are scaled back.
- In managing affordability with the Schools Block, the Authority proposes effectively to ‘ring fence’ primary and secondary monies separately so that any over or under spending, and adjustment to correct this, is considered on a separate phase basis and so that monies are not transferred between the phases where it is possible to avoid this. Please note that the values of MFG and ceiling must be set the same for both phases.
- Most of the additional detail in this consultation document focuses on explaining NFF and sets out the case for moving to this from April 2018.

Decision 2 – The value of the Minimum Funding Guarantee in 2018/19

- **The Authority proposes to set the MFG at 0%, subject to final affordability**, which will be confirmed once the cost of formula funding using the October 2017 Census dataset is known. Where 0% is not affordable, the Authority will discuss the options for addressing this with the Schools Forum and will ask the Schools Forum to make a recommendation on this matter. This may mean that the MFG is reduced towards or to minus 1.5%.
- A 0% MFG would be a significant improvement on the original MFG level for 2018/19 proposed by the DfE, which was minus 1.5%. If we are able to afford a 0% MFG, school allocations, in particular for the primary phase, will be improved on what was forecasted earlier in 2017 (and on what the HCSS Budget Software assumed).

Decision 3 – The value Ceiling in 2018/19

- **The Authority proposes to set the ceiling at + 3% per pupil, subject to final affordability**, meaning that any gain in a school’s or academy’s core formula funding per pupil will not be greater than 3% on 2017/18. Please note that the implementation of the DfE’s new minimum per pupil funding will override this ceiling, meaning that schools eligible for the new minimum may see increases in per pupil funding greater than 3%. Where 3% is not affordable, the Authority will discuss the options for addressing this with the Schools Forum and will ask the Schools Forum to make a recommendation on this matter. This may mean that the ceiling is reduced from 3%.

Decision 4 – The extent of implementation of the new DfE Minimum Per Pupil Funding Floors in 2018/19

- **The Authority proposes to fully implement the £3,500 (primary), £4,800 (secondary) and £4,042 (all-through) minimums for eligible schools, where this is affordable**. Where this is not affordable i.e. this cannot be afforded within the phase without adjustment elsewhere e.g. in the value of the MFG, the Authority will discuss this with the Schools Forum and will ask the Forum to make a recommendation on this matter in January 2018. This may mean movement to the full minimums may be scaled back in 2018/19. Please note that the Government has only funded at

DSG level the minimums up to a transitional value in 2018/19. Therefore, full implementation of the minimums in 2018/19 will cost more than the DfE has specifically funded.

- Please note that the calculation of these minimums under the NFF is different from the calculation permitted locally by the 2018/19 Regulations. Therefore, we cannot completely replicate how this factor works under local conditions. However, we are permitted to apply to the Secretary of State to adjust the calculation in specific circumstances. We propose to submit a request to the Secretary of State to exclude both the BSF factor and business rates from the calculation of these minimums.

Decision 5 – Remaining Schools Block Headroom due to the difference between the 0.5% national settlement and a 0% MFG

- Under both Bradford's current formula and NFF, the vast majority of primary schools and academies are funded on the MFG. Under 2018/19 Regulations, the best formula funding settlement that can be provided for these schools from the Schools Block is 0% (same allocation in 2018/19 as 2017/18 where pupil numbers are the same). This means that, for the primary phase, there is the potential, subject to the cost of formula funding using the October 2017 Census dataset, for there to be money unallocated within the Schools Block allocation, because the DfE has allocated 0.5% per pupil into the Schools Block in respect of these schools. The position of the secondary phase is somewhat different, as 2/3rds of schools and academies are above the MFG.
- Modelling strongly indicates that it will be very difficult to allocate these monies by adjusting formulae, so that the result is that a large number of primary schools are lifted off the MFG, whilst also keeping to the key proposal of moving to NFF and without distorting our formula approach.
- Initial feedback from primary representatives on the Schools Forum is that **primary schools and academies would welcome the earmarking of any unallocated monies in support of SEND cost pressures in schools that have lower levels of formula funding in relation to their proportion of children with EHCPs**. The Schools Forum has asked the Authority to look at the options for the further development of the SEN Floor mechanism, which does already target additional High Needs Block funding to low AEN high EHCP schools and academies. This proposal will be developed further over the autumn term. It would only be a temporary, possibly one off, arrangement. To go ahead, this will require specific agreement by the Schools Forum for the transfer of Schools Block monies to the High Needs Block. However, to be clear, this transfer will be to enable additional spending in support of SEND in the primary phase, not to act as a contribution to general cost pressures within the High Needs Block.

Decision 6 – High Needs Block and Schools Block Headroom

- Bradford gains from the new High Needs Block (HNB) NFF formula, by £7.5m over 5 years, assuming the continuation of capping after 2019/20. The NFF result is still heavily damped, with only 50% of the national HNB budget allocated on the basis of the new formula. 50% will be allocated on the basis of 2017/18 spending levels. Bradford's gain if the HNB was allocated fully on formula would be £15m vs. the £7.5m we are likely to receive. The DfE does not indicate for how long 50% of the HNB will be based on historic spending.
- In this context, recognising the growth in SEND in Bradford (for example, the c. £1m annual growth in the cost of mainstream EHCPs, which if continuing would consume in itself £5m of the £7.5m 5 year increase), the financial position of the High Needs Block is incredibly challenging. Alongside the NFF, the position of the HNB, and review activity and consultation, will dominate the Schools Forum's discussions in the lead up to final decision making on the 2018/19 DSG allocation.
- It is important that readers of this consultation document understand this position. The Authority recognises the significant contribution that the Schools Block made to high needs provision in 2017/18. **We will engage with and take a clear steer from the Schools Forum on the views of school colleagues about how to continue to manage high needs provision and pressures without the context of a whole-school system wide financially challenging environment.** Under 2018/19 Regulations, authorities are permitted to transfer up to 0.5% of the Schools Block to

the High Needs Block with the agreement of the Schools Forum following consultation with schools. 0.5% of our Schools Block is c. £2m. The possible transfer of Schools Block monies to the High Needs Block to effect decision 5 for the primary phase would be counted within the 0.5%.

2.4 For the knock on consequences of these proposals, listed in paragraph 2.2, the Authority proposes the following:

Notional SEN

- Local authorities are currently required to define for each primary and secondary school the value of formula funding that is 'notionally' allocated for SEND (for meeting the first £6,000 of needs for pupils with EHCPs and the needs of pupils without EHCPs). The DfE has signalled that the local calculation of this will cease upon implementation of the hard National Funding Formula, where the DfE will be looking for other ways to define SEND funding resources.
- Our calculation has built up over time. How Bradford currently defines notional SEN (the %s of funding in each factor that make up this budget) is shown in the table below.

Formula Factor	% Primary	% Secondary
Prior Low Attainment	100%	100%
Free School Meals Factor	23.1%	10.2%
IDACI Factor	22.4%	19.2%
Base £APP	7.5%	6.3%

- Under Bradford's current notional SEN calculation then, 100% of a school's allocation under the SEND low prior attainment factor is considered to be allocated for supporting pupils with SEND, along with set percentages of other AEN factors and base £app funding. Due to the way that NFF re-focuses AEN formula funding, away from deprivation towards low prior attainment, and also significantly increases the proportion of funding that is allocated for low prior attainment, under our current calculation, the values of notional SEN allocations for schools will quite considerably increase in 2018/19 where we adopt NFF. This will be the case even though a school may receive (under a 0% MFG) the same total amount of formula funding. In this circumstance, we appreciate that schools will have mixed feelings about this change. However, the NFF is refocusing and increasing the targeting of SEND through low prior attainment. It can therefore, be said to be valid to ask schools to consider and to evidence how they are spending the full value of their prior attainment monies on the needs of their pupils.
- We therefore, do not propose to alter how we define notional SEN where we move to NFF at April 2018.** All other elements being the same, schools will see their notional SEN allocations increase.

SEN Floor

- The increase in the funding of low prior attainment under NFF will have a knock on consequence on the SEN Floor as the eligibility for the SEN Floor will significantly decrease. This will be the case even though a number of schools will not see any more funding in 2018/19 in total than they did in 2017/18.
- Our current SEN Floor provides a 'top up' where the SEN formula does not allocate a minimum level of funding, after the cost of EHCPs has been removed. This is re-calculated on a monthly basis for changes in EHCP positions. SEN formula funding is defined as the notional SEN in the table above but does not include 5.5% (primary) / 4.5% (secondary) of the Base £APP element. The floor tops up funding to these minimums:
 - For Primary schools and academies: £19,931 or £69.10 per pupil (whichever is greater)
 - For Secondary schools and academies £75,337 or £69.10 per pupil (whichever is greater)
- The Authority's basic proposal is that we protect the values of SEN Floor allocations for individual schools and academies in 2018/19 that would otherwise be reduced. We propose**

that we ensure that schools and academies that are currently funded under the SEN Floor receive in 2018/19 at least the value of allocation they have received in 2017/18, pending further review for 2019/20.

- Please be aware, under decision 5, that the Schools Forum is currently considering whether further support for SEND can be provided for primary schools and academies through the Floor mechanism in 2018/19, on a temporary possibly one off basis, by using primary phase headroom within the Schools Block.

Factors Outside NFF Scope in 2018/19

- **We propose to continue our current 2017/18 formulae for the allocation of both split sites and pupil mobility.** These factors will be updated for October 2017 Census data. The values of the formula factors will be the same.
- **Business rates will continue to be funded at actual cost.**
- **The approach to Growth Funding is proposed to be as 2017/18 but the values per pupil funding will be aligned to the NFF values where we move to NFF at April 2018.**
- **We propose to continue to pass through the specific BSF DSG affordability gap values using our current method but with an adjustment to ensure that the amounts passed on to academies by the EFA on an academic year basis are equivalent to the amounts that the Authority requires academies to pay back on a financial year basis.** We also propose to submit a disapplication request to the Secretary of State to ensure that this change does not consume growth that the MFG or ceiling would otherwise provide for an academy in 2018/19.

		Option A: MFG Route (at 0.5%)			Option B: SEN Floor Route			Diff between the 2 Options
Phase	School	MFG at 0%	MFG at 0.5%	Diff (MFG enhancement)	17/18 Existing SEN Floor	Enhanced SEN Floor	Diff (SEN Floor enhancement)	
ALL THROUGH	Appleton Academy	0	7,851	7,851	0	0	0	-7,851
ALL THROUGH	Bradford Academy	0	0	0	0	0	0	0
ALL THROUGH	Bradford Girls Grammar (Free School)	0	0	0	0	0	0	0
ALL THROUGH	Dixons Allerton Academy	16,282	54,830	38,548	0	0	0	-38,548
PRIMARY	Addingham Primary School	58,238	61,858	3,621	13,278	28,347	15,069	11,449
PRIMARY	All Saints' CE Primary School (Bradford)	0	0	0	0	0	0	0
PRIMARY	All Saints' CE Primary School (Ilkley)	65,347	70,264	4,917	28,335	44,734	16,399	11,482
PRIMARY	Ashlands Primary School	0	0	0	14,711	37,857	23,146	23,146
PRIMARY	Atlas School	44,572	48,980	4,408	0	0	0	-4,408
PRIMARY	Baildon CE Primary School	0	4,269	4,269	1,597	22,823	21,226	16,957
PRIMARY	Bankfoot Primary School	61,783	66,660	4,877	0	0	0	-4,877
PRIMARY	Barkerend Academy	28,732	37,536	8,803	0	0	0	-8,803
PRIMARY	Beckfoot Allerton Primary Academy	94,362	102,356	7,994	0	0	0	-7,994
PRIMARY	Beckfoot Heaton Primary Academy	0	0	0	0	0	0	0
PRIMARY	Beckfoot Priestthorpe Primary School	52,124	55,363	3,239	216	15,286	15,069	11,831
PRIMARY	Ben Rhydding Primary School	49,211	52,633	3,422	17,997	33,066	15,069	11,648
PRIMARY	Blakehill Primary School	3,133	10,193	7,061	0	0	0	-7,061
PRIMARY	Bowling Park Primary School	0	0	0	0	0	0	0
PRIMARY	Brackenhill Primary School	42,069	50,489	8,419	0	0	0	-8,419
PRIMARY	Burley & Woodhead CE Primary School	55,516	58,996	3,480	9,471	24,540	15,069	11,589
PRIMARY	Burley Oaks Primary School	0	0	0	0	20,307	20,307	20,307
PRIMARY	Byron Primary School	0	4,492	4,492	0	0	0	-4,492
PRIMARY	Carrwood Primary School	112,866	120,755	7,889	0	0	0	-7,889
PRIMARY	Cavendish Primary School	445	8,940	8,495	0	0	0	-8,495
PRIMARY	Christ Church Primary Academy	57,647	61,807	4,160	0	0	0	-4,160
PRIMARY	Clayton St John's CE Primary Academy	54,162	61,351	7,189	0	12,524	12,524	5,334
PRIMARY	Clayton Village Primary School	65,620	69,612	3,992	0	0	0	-3,992
PRIMARY	Copthorne Primary	0	0	0	0	0	0	0
PRIMARY	Cottingley Village Primary School	58,790	66,004	7,215	0	19,527	19,527	12,312
PRIMARY	Crossflatts Primary School	0	0	0	0	17,777	17,777	17,777
PRIMARY	Crossley Hall Primary School	0	0	0	0	0	0	0
PRIMARY	Cullingworth Village Primary School	52,527	57,217	4,689	12,493	27,562	15,069	10,380
PRIMARY	Denholme Primary	41,532	45,316	3,784	0	8,491	8,491	4,707
PRIMARY	Dixons Manningham Primary Academy	508	8,024	7,516	0	0	0	-7,516
PRIMARY	Dixons Marchbank Academy	70,964	79,837	8,873	0	0	0	-8,873
PRIMARY	Dixons Music Primary	84,268	91,065	6,797	0	813	813	-5,985
PRIMARY	East Morton CE Primary Academy	56,849	60,280	3,431	11,146	26,216	15,069	11,638
PRIMARY	Eastburn Junior and Infant School	39,727	43,124	3,397	20,363	35,433	15,069	11,673
PRIMARY	Eastwood Primary School	48,696	56,899	8,203	0	0	0	-8,203
PRIMARY	Eldwick Primary School	0	0	0	0	22,678	22,678	22,678
PRIMARY	Fagley Primary School	33,375	38,105	4,731	0	0	0	-4,731
PRIMARY	Farfield Primary	39,032	47,751	8,719	0	0	0	-8,719
PRIMARY	Farnham Primary School	0	0	0	0	0	0	0
PRIMARY	Fearnville Primary School	41,635	49,209	7,575	0	0	0	-7,575
PRIMARY	Feversham Primary Academy	117,718	125,884	8,166	0	0	0	-8,166
PRIMARY	Foxhill Primary School	40,898	44,492	3,594	8,028	23,097	15,069	11,475
PRIMARY	Frizinghall Primary School	23,691	31,568	7,876	0	0	0	-7,876
PRIMARY	Girlington Primary School	6,656	15,159	8,503	0	0	0	-8,503
PRIMARY	Glenaire Primary School	56,705	60,404	3,699	0	0	0	-3,699
PRIMARY	Green Lane Primary	147,246	159,759	12,513	0	0	0	-12,513
PRIMARY	Greengates Primary School	48,215	52,249	4,034	0	0	0	-4,034
PRIMARY	Grove House Primary School	0	4,785	4,785	0	0	0	-4,785
PRIMARY	Harden Primary Academy	62,054	65,465	3,411	4,366	19,436	15,069	11,658
PRIMARY	Haworth Primary Academy	33,742	38,324	4,582	0	13,630	13,630	9,048
PRIMARY	Heaton St Barnabas' CE Primary School	78,371	86,101	7,730	0	5,879	5,879	-1,851
PRIMARY	High Craggs Primary Academy	23,407	31,011	7,604	0	0	0	-7,604
PRIMARY	Hill Top CE Primary School	34,410	38,226	3,816	14,846	29,916	15,069	11,253
PRIMARY	Hollingwood Primary School	0	0	0	0	0	0	0
PRIMARY	Holybrook Primary School	74,125	78,672	4,547	0	0	0	-4,547
PRIMARY	Holycroft Primary School	35,573	43,135	7,562	0	0	0	-7,562
PRIMARY	Home Farm Primary School	37,994	45,742	7,748	0	0	0	-7,748
PRIMARY	Horton Grange Primary	0	0	0	0	0	0	0
PRIMARY	Horton Park Primary	205,742	215,588	9,846	0	0	0	-9,846
PRIMARY	Hoyle Court Primary School	24,404	29,553	5,149	0	0	0	-5,149
PRIMARY	Idle CE Primary School	79,201	84,741	5,540	0	6,514	6,514	974
PRIMARY	Ingrow Primary School	71,339	79,092	7,753	0	0	0	-7,753
PRIMARY	Iqra Primary Academy	172,335	184,329	11,994	0	0	0	-11,994
PRIMARY	Keelham Primary School	54,406	56,298	1,891	27,329	42,398	15,069	13,178
PRIMARY	Keighley St Andrew's CE Primary School	0	0	0	0	0	0	0
PRIMARY	Killinghall Primary School	0	0	0	0	0	0	0
PRIMARY	Knowleswood Primary School	37,945	47,223	9,278	0	0	0	-9,278
PRIMARY	Lapage Primary School and Nursery	77,370	90,153	12,783	0	0	0	-12,783

Phase	School	Option A: MFG Route (at 0.5%)			Option B: SEN Floor Route			Diff between the 2 Options
		MFG at 0%	MFG at 0.5%	Diff (MFG enhancement)	17/18 Existing SEN Floor	Enhanced SEN Floor	Diff (SEN Floor enhancement)	
PRIMARY	Laycock Primary School	64,197	66,411	2,214	0	4,116	4,116	1,903
PRIMARY	Lees Primary Academy	51,217	54,750	3,532	8,866	23,936	15,069	11,537
PRIMARY	Ley Top Primary School	61,169	67,865	6,696	0	0	0	-6,696
PRIMARY	Lidget Green Primary School	0	0	0	0	0	0	0
PRIMARY	Lilycroft Primary School	0	0	0	0	0	0	0
PRIMARY	Lister Primary School	22,068	29,644	7,576	0	7,419	7,419	-157
PRIMARY	Long Lee Primary School	24,515	31,342	6,827	0	0	0	-6,827
PRIMARY	Low Ash Primary School	36,753	44,108	7,355	0	2,856	2,856	-4,499
PRIMARY	Low Moor CE Primary School	33,685	40,857	7,172	0	6,212	6,212	-960
PRIMARY	Lower Fields Primary School	85,158	93,855	8,697	0	0	0	-8,697
PRIMARY	Margaret McMillan Primary School	0	0	0	0	0	0	0
PRIMARY	Marshfield Primary School	59,149	67,191	8,042	0	0	0	-8,042
PRIMARY	Menston Primary School	0	0	0	16,288	38,033	21,745	21,745
PRIMARY	Merlin Top Primary Academy	101,733	108,545	6,812	0	0	0	-6,812
PRIMARY	Miriam Lord Community Primary School	31,219	38,288	7,069	0	0	0	-7,069
PRIMARY	Myrtle Park Primary School	46,197	49,829	3,632	28,112	43,182	15,069	11,438
PRIMARY	Nessfield Primary School	59,727	66,536	6,809	0	10,864	10,864	4,055
PRIMARY	Newby Primary School	1,844	10,075	8,231	0	0	0	-8,231
PRIMARY	Newhall Park Primary School	63,850	71,587	7,737	0	0	0	-7,737
PRIMARY	Oakworth Primary Academy	0	1,327	1,327	0	7,226	7,226	5,899
PRIMARY	Oldfield Primary School	82,938	84,364	1,426	27,054	42,123	15,069	13,643
PRIMARY	Our Lady & St Brendan's Catholic Primary School	0	0	0	0	0	0	0
PRIMARY	Our Lady of Victories Catholic Primary Academy	0	0	0	0	2,164	2,164	2,164
PRIMARY	Oxenhope CE Primary Academy	51,933	55,208	3,274	8,013	23,082	15,069	11,795
PRIMARY	Parkland Primary School	90,933	96,278	5,345	0	0	0	-5,345
PRIMARY	Parkwood Primary School	158,166	163,014	4,849	0	0	0	-4,849
PRIMARY	Peel Park Primary School	92,898	104,969	12,071	0	0	0	-12,071
PRIMARY	Poplars Farm Primary School	30,401	34,423	4,022	0	0	0	-4,022
PRIMARY	Princeville Primary School and Children's Centre	0	0	0	0	0	0	0
PRIMARY	Rainbow Primary Free School	0	0	0	0	0	0	0
PRIMARY	Reevy Hill Primary School	67,392	71,913	4,522	0	0	0	-4,522
PRIMARY	Riddlesden St Mary's CE Primary	0	0	0	0	0	0	0
PRIMARY	Russell Hall Primary School	51,139	54,963	3,824	14,731	29,800	15,069	11,246
PRIMARY	Ryecroft Primary Academy	97,994	104,204	6,210	0	0	0	-6,210
PRIMARY	Saltaire Primary School	62,789	69,933	7,144	0	15,795	15,795	8,651
PRIMARY	Sandal Primary School and Nursery	73,062	79,810	6,748	3,882	24,797	20,914	14,167
PRIMARY	Sandy Lane Primary School	38,102	43,558	5,456	0	0	0	-5,456
PRIMARY	Shibden Head Primary Academy	16,148	22,959	6,811	0	3,543	3,543	-3,267
PRIMARY	Shipley CE Primary School	50,467	54,283	3,816	0	14,792	14,792	10,976
PRIMARY	Shirley Manor Primary Academy	76,288	80,500	4,212	0	0	0	-4,212
PRIMARY	Silsden Primary School	20,218	29,549	9,331	15,182	37,692	22,510	13,180
PRIMARY	Southmere Primary Academy	12,334	20,179	7,845	0	0	0	-7,845
PRIMARY	St Anne's Catholic Primary Academy	13,125	17,489	4,364	0	0	0	-4,364
PRIMARY	St Anthony's Catholic Primary School (Clayton)	47,269	51,149	3,880	0	0	0	-3,880
PRIMARY	St Anthony's Catholic Primary School (Shipley)	53,128	55,630	2,503	14,460	29,530	15,069	12,567
PRIMARY	St Clare's Catholic Primary School	34,143	38,445	4,302	0	0	0	-4,302
PRIMARY	St Columba's Catholic Primary School	48,946	56,633	7,687	0	0	0	-7,687
PRIMARY	St Cuthbert & the First Martyrs' Catholic Primary	27,134	30,937	3,803	18,149	33,219	15,069	11,266
PRIMARY	St Francis' Catholic Primary School	56,036	59,719	3,683	0	3,251	3,251	-432
PRIMARY	St James' Church Primary School	32,843	38,885	6,042	0	0	0	-6,042
PRIMARY	St John The Evangelist Catholic Primary	20,836	24,530	3,694	0	0	0	-3,694
PRIMARY	St John's CE Primary School	80,371	88,529	8,158	0	0	0	-8,158
PRIMARY	St Joseph's Catholic Primary School (Bingley)	55,843	59,279	3,436	12,012	27,082	15,069	11,634
PRIMARY	St Joseph's Catholic Primary School (Bradford)	38,695	44,971	6,276	0	0	0	-6,276
PRIMARY	St Joseph's Catholic Primary, Keighley	56,843	61,801	4,958	0	0	0	-4,958
PRIMARY	St Luke's CE Primary School	57,110	61,133	4,023	0	1,049	1,049	-2,975
PRIMARY	St Mary's and St Peter's Catholic	53,187	57,489	4,301	0	0	0	-4,301
PRIMARY	St Matthew's Catholic Primary School	43,898	48,269	4,372	0	0	0	-4,372
PRIMARY	St Matthew's CE Primary School	40,832	48,990	8,158	0	0	0	-8,158
PRIMARY	St Oswald's CE Primary Academy	65,283	73,473	8,190	0	0	0	-8,190
PRIMARY	St Paul's CE Primary School	41,757	45,585	3,828	0	0	0	-3,828
PRIMARY	St Philip's CE Primary Academy	3,759	7,835	4,076	0	0	0	-4,076
PRIMARY	St Stephen's CE Primary School	0	0	0	0	0	0	0
PRIMARY	St Walburga's Catholic Primary School	58,003	61,568	3,565	10,999	26,069	15,069	11,504
PRIMARY	St William's Catholic Primary School	12,340	16,072	3,732	0	12,675	12,675	8,943
PRIMARY	St Winefride's Catholic Primary	32,551	39,894	7,343	0	0	0	-7,343
PRIMARY	Stanbury Village School	64,837	66,540	1,703	16,585	31,655	15,069	13,367
PRIMARY	Steeton Primary School	9,394	14,633	5,238	0	447	447	-4,791
PRIMARY	Stocks Lane Primary School	46,035	48,767	2,732	24,122	39,192	15,069	12,337
PRIMARY	Swain House Primary School	33,109	41,315	8,206	0	0	0	-8,206
PRIMARY	Thackley Primary School	42,608	49,420	6,813	0	4,874	4,874	-1,939
PRIMARY	The Sacred Heart Catholic Primary Academy	45,289	48,487	3,197	19,256	34,325	15,069	11,872
PRIMARY	Thornbury Academy	0	0	0	0	0	0	0
PRIMARY	Thornton Primary School	4,812	14,952	10,140	0	0	0	-10,140

		Option A: MFG Route (at 0.5%)			Option B: SEN Floor Route			Diff between the 2 Options
Phase	School	MFG at 0%	MFG at 0.5%	Diff (MFG enhancement)	17/18 Existing SEN Floor	Enhanced SEN Floor	Diff (SEN Floor enhancement)	
PRIMARY	Thorpe Primary School	43,802	47,694	3,893	0	0	0	-3,893
PRIMARY	Trinity All Saints CE Primary School	44,057	49,990	5,933	0	16,646	16,646	10,713
PRIMARY	Victoria Primary School	2,908	8,048	5,140	0	0	0	-5,140
PRIMARY	Wellington Primary School	0	0	0	0	5,849	5,849	5,849
PRIMARY	Westbourne Primary School	24,145	32,314	8,169	0	0	0	-8,169
PRIMARY	Westminster CE Primary Academy	31,514	43,771	12,257	0	0	0	-12,257
PRIMARY	Whetley Primary Academy	52,001	62,188	10,188	0	0	0	-10,188
PRIMARY	Wibsey Primary School	25,314	36,650	11,336	0	0	0	-11,336
PRIMARY	Wilsden Primary School	0	0	0	7,114	28,184	21,070	21,070
PRIMARY	Woodlands CE Primary School	53,162	54,976	1,814	6,480	21,549	15,069	13,255
PRIMARY	Woodside Academy	88,306	96,889	8,583	0	0	0	-8,583
PRIMARY	Worth Valley Primary	50,761	54,936	4,175	0	0	0	-4,175
PRIMARY	Worthinghead Primary School	81,960	85,755	3,795	2,408	17,477	15,069	11,275
PRIMARY	Wycliffe CE Primary School	54,323	60,236	5,913	0	0	0	-5,913
SECONDARY	Beckfoot Academy	0	0	0	0	0	0	0
SECONDARY	Beckfoot Oakbank Academy	0	0	0	0	0	0	0
SECONDARY	Beckfoot Thornton Academy	0	0	0	0	0	0	0
SECONDARY	Beckfoot Upper Heaton Academy	228,194	241,295	13,100	0	0	0	-13,100
SECONDARY	Belle Vue Girls' Academy	0	0	0	0	0	0	0
SECONDARY	Bingley Grammar School	0	0	0	0	0	0	0
SECONDARY	Bradford Forster Academy	0	0	0	0	0	0	0
SECONDARY	Buttershaw Business & Enterprise College Academy	0	0	0	0	0	0	0
SECONDARY	Carlton Bolling College	23,269	60,054	36,786	0	0	0	-36,786
SECONDARY	Dixons City Academy	48,561	69,698	21,137	0	0	0	-21,137
SECONDARY	Dixons Kings Academy	36,877	58,714	21,837	0	0	0	-21,837
SECONDARY	Dixons McMillan Academy	114,915	128,610	13,696	0	0	0	-13,696
SECONDARY	Dixons Trinity Academy	84,200	98,851	14,652	0	0	0	-14,652
SECONDARY	Feversham College	172,482	189,872	17,389	0	0	0	-17,389
SECONDARY	Grange Technology College	0	0	0	0	0	0	0
SECONDARY	Hanson School	0	0	0	0	0	0	0
SECONDARY	Ilkley Grammar School	0	0	0	5,592	5,592	0	0
SECONDARY	Immanuel College Academy	0	0	0	0	0	0	0
SECONDARY	Laisterdyke Leadership Academy	0	0	0	0	0	0	0
SECONDARY	Oasis Academy Lister Park	0	0	0	0	0	0	0
SECONDARY	One In A Million (Free School)	7,690	17,376	9,686	0	0	0	-9,686
SECONDARY	Parkside School	0	0	0	0	0	0	0
SECONDARY	Queensbury Academy	0	0	0	0	0	0	0
SECONDARY	Samuel Lister Academy	0	5,901	5,901	0	0	0	-5,901
SECONDARY	St Bede's & St Joseph's Catholic College	0	9,330	9,330	0	0	0	-9,330
SECONDARY	The Holy Family Catholic School	0	0	0	0	0	0	0
SECONDARY	Titus Salt School	0	0	0	0	0	0	0
SECONDARY	Tong Leadership Academy	0	0	0	0	0	0	0
SECONDARY	University Academy Keighley	240,934	261,680	20,747	0	0	0	-20,747
	Total	7,518,632	8,519,586	1,000,954	443,482	1,215,146	771,664	
No. of schools & academies affected		142			59			
% of schools & academies affected		75%			31%			
Primary headroom value required / allocated		770,295			771,664			
Secondary headroom value required / allocated		230,659			0			

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SCHOOLS FORUM AGENDA ITEM

For Action

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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 2018/19 Early Years Single Funding Formula.

Date (s) of any Previous Discussion at the Forum

The consultation document was presented to the Schools Forum on 18 October 2017.

Background / Context

At the Schools Forum meeting 5 July 2017 it was reported that, following the finalisation of accounts at 2016/17 year end, that our current reconciliation identifies a further £1.35m of balances ring-fenced for the Early Years Block (£1.85m rather than the £0.5m estimated in the January reports). This is the result of differences in free entitlement numbers, further underspending of the earmarked 2 year old resources and an unspent sum of £0.45m in Early Years Pupil Premium.

In July 2017, the Authority presented an informal early consultation to the Schools Forum on the proposed movement from a termly headcount based formula approach to a full monthly 'starters and leavers' formula approach, which it was anticipated would be fully implemented at April 2018 but may be implemented in pilot before this.

The Government's extended 30 hours free entitlement for 3 and 4 years olds of working parents has been implemented from September 2017. The first full count of numbers taking this new offer in Bradford will be collected within the October 2017 Census.

Entitlement delivery changes are taking place within the context of the Government's national early years funding reform and the impact that this is having on Bradford's DSG Early Years Block, which is in quick summary:

- A 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 increased from £4.83 to £5.20 in 2017/18.
- 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, 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.
- Protection for the funding levels of maintained nursery schools, currently promised to the end of 2019/20.

Details of the Item for Consideration

Consultation Responses

Appendix 2 (to be tabled at the meeting) will provide an analysis of the formal responses received to the consultation. Members are encouraged to present to the meeting their feedback from their discussions with school colleagues.

Members are asked to consider whether any of the proposals should be amended in the light of feedback and / or whether further information is required in order for the Schools Forum to make its recommendations, on 10 January 2018, on the Early Years Single Funding Formula for 2018/19.

Details of the Item for Consideration (continued)

Additional Information

To summarise some of the more detailed specific aspects for the Forum's awareness focusing on what the proposals mean for the Early Years Block and the DSG:

- The proposals operate within a 'ring-fenced' Early Years Block.
- The DfE has established a restriction, which does not permit more than 5% of the Early Years Block (3&4 year olds) to be held in centrally managed funds. Current forecasts indicate that we will continue to hold around 1% on centrally managed funds in 2018/19, so we are well within DfE limits.
- The DfE has also established a restriction, which does not permit more than 10% of the 3&4 year old EYSFF to be allocated through 'supplements', which includes deprivation. The proposal to continue to set deprivation spending at 9.5% and to have no other supplements means that we will continue to comply with this requirement.
- We propose to 100% pass through the DSG rate of funding for the 2 year old offer onto providers. The 2018/19 DSG rate of funding is still to be confirmed. It is currently £5.20 per hour, but may be adjusted from this.
- The protection of the 3&4 year old base rate funding will require the allocation of Early Years Block reserve in 2018/19 as well as the holding of reserve for allocation in 2019/20. This is set out further in Document IA. The actual cost to reserve is dependent on a number of factors, including the take up of the 30 hours extended entitlement and how the move to monthly starters and leavers affects the total cost of our EYSFF. The value of reserve available will also be influenced by these factors.
- The on-going value of the 3&4 year old universal base rate, from April 2019, without protection afforded by the use of reserve, will need to be re-calculated as data firms up. Currently, it is forecasted that this rate will reduce to around £4.00 per hour at April 2020.
- The funding of nursery schools is protected for 2018/19 and 2019/20 by the DfE's specific MNS supplement. This protects the rate of funding for individual nursery schools at 2016/17 (pre-national reform) levels. This protection does not however, protect against reductions in pupil numbers. The DfE has stated that it intends to further consult on the on-going future position of the funding of nursery schools. This consultation is still to be published.
- Linking in with discussions about the pressures within the High Needs Block (HNB), it is proposed that specific Early Years SEND Inclusion funds, from April 2018, will be 100% funded from the Early Years Block. This is proposed in the context of the High Needs Block increasing its spending on early years SEND support through the proposed new Early Years Centres of Excellence. Indicatively, a budget of £0.8m is planned to be funded from the EYB in 2018/19 for allocation for inclusion. For reference, a budget of £0.6m has been held in 2017/18 with this funded 50/50 between the EYB and the HNB.
- Under the proposed Early Years Centres of Excellence and places creation framework, 'element 1' funding of children placed in these centres will be funded from the EYB via the EYSFF, with the HNB funding elements 2 (the £6,000) and 3 (the Plus Top Up element). This is different from current methodology for funding Childrens Centre Plus provision, where all funding comes from the HNB, but is in line with the DfE's technical adjustment for the funding of resourced provisions under National Funding Formula, which comes in at April 2018.

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

As outlined in Document IB. The Early Years Block is 'ring-fenced' and is expected to balance / contains its own spending pressures.

Recommendations

The Forum is asked to consider the outcomes of the consultation and whether any of the proposals should be changed in the light of responses. Members will be asked to make final recommendations on the structure of the formulae on 10 January 2018. As such, Members are asked to consider whether sufficient information has now been provided to enable these final recommendations to be made.

List of Supporting Appendices / Papers *(where applicable)*

Appendix 1 – Consultation Proposals Summary

Appendix 2 – Consultation Responses – Bradford District's Early Years Single Funding Formula 2018/19 (to be tabled at the meeting).

Contact Officer *(name, telephone number and email address)*

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Summary of Consultation Proposals - Early Years Single Funding Formula 2018/19

The Authority has developed the proposals for 2018/19 on the basis that:

- We will continue the policy of ring-fencing of the Early Years Block.
- We will move to monthly starters and leavers counting at April 2018, which will replace the termly headcount count methodology (and 2nd headcount for the 2 year old offer).
- We will seek to simplify the processes for PVI providers, which will include no longer publishing a 'hard copy' pre-calculated Confirmed Indicative Budget for PVI providers in March. Instead, we will begin monthly payments based on the latest confirmed position and we will enable providers to use a ready reckoner to estimate funding.
- Our Early Years Single Funding Formula will continue to 100% pass through the DSG funding rate for:
 - The 2 year old free entitlement
 - The Early Years Pupil Premium (required)
 - The Disability Access Fund (required)
- We will continue & increase the Early Years Block's contribution to EY SEN Inclusion funds, which is proposed to be managed through a new SEND EY Centres of Excellence structure. Early Years Inclusion monies will be 100% funded from within the Early Years Block from 1 April 2018.
- We will establish a Universal Base Rate for the 3 & 4 year old offer, as required by the DfE, with this overridden in 2018/19 for:
 - Nursery Schools – with the allocation of the specific MNS factor, meaning that the funding rates for each nursery school (base and deprivation) will continue to be retained at their 2016/17 values, as we have done in 2017/18.
 - PVI providers and nursery classes – through the allocation of additional one off monies on a transitional / temporary basis. The aim will be to set a base rate at £4.12 per hour, as set out in the autumn 2016 consultation.
- We will continue the nursery school sustainability supplement using the current methodology but bringing the 30 hours extended entitlement into the calculation (which will reduce the cost of the sustainability supplement).
- We will continue our current deprivation supplement within the 3&4 year old EYSFF in 2018/19, calculated at 9.5% of EYSFF, and will keep this under review. Deprivation rates will reduce in 2018/19 because the overall EYSFF funding envelope is reducing due to the impact of national reform.
- We will not introduce any further supplements in 2018/19 and will keep this position under review, noting that any additional supplements would erode the value of the deprivation supplement as the maximum spend on all supplements set by the DfE is 10% of EYSFF.
- We will aim to hold one off monies within the Early Years Block so that a minimum 3 & 4 year old base rate of £4.11 can be afforded in 2019/20, as set out in the autumn 2016 consultation. This will be subject to the value of one off monies available.

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SCHOOLS FORUM AGENDA ITEM

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

This report asks Forum Members to consider the outcomes of the consultation on the 2018/19 High Needs Funding Model and the planned number of high needs places to be commissioned by the Authority. The report also gives an update on the position of other strategic high needs funding matters. This update is provided in advance of asking Members to make final recommendations on 10 January 2018.

Date (s) of any Previous Discussion at the Forum

The 2018/19 consultation document was presented to the Schools Forum at the last meeting 18 October 2017.

Background / Context

Please see Appendix 1, which provides a summary of the proposals set out in the consultation. This consultation focused on High Needs Block technical and formula structure matters; how delegated budgets for individual providers are calculated and allocated in the 2018/19 financial year.

Please see Appendix 2, which provides an updated summary of places intended to be commissioned by the Authority in 2018/19.

Members are reminded that the DfE has announced that, under National Funding Formula, local authorities retain responsibility for the management of their High Needs Block funding arrangements, with flexibility to adjust the basic 'Place-Plus' structure according to local needs. There are a small number of technical adjustments directed by the DfE for 2018/19 and these were explained within the consultation document. The Minimum Funding Guarantee, for special schools, can be set by the Authority between 0% and minus 1.5%.

Members are also reminded that size and continuing growth of the cost pressure within the High Needs Block, together with the development of specialist places, is one of key issues the Authority, with the Schools Forum, must manage. The Schools Forum was presented in January 2017 with a 'trajectory' forecast, which estimated the position of the High Needs Block under National Funding Formula over the next 5 years. Together with consideration of the data presented on the insufficiency of places, this trajectory lay behind the Forum's recommendations / agreement for the transfer of £5.7m from the Schools Block to the High Needs Block in 2017/18. The forecasted position of the High Needs Block from April 2018 is summarised in the separate Document IB.

Details of the Item for Consideration

Consultation Responses

Appendix 3 (to be tabled at the meeting) will provide an analysis of the formal responses received to the consultation. Members are encouraged to present to the meeting their feedback from their discussions with school colleagues.

Members are asked to consider whether any of the proposals should be amended in the light of feedback and / or whether further information is required in order for the Schools Forum to make its recommendations, on 10 January 2018.

Top Up Values (Plus Model) – Reduction of 1.5% in 2018/19

One of the key recommendations to be considered by the Schools Forum for 2018/19 is whether the values of top up allocated by the 7 Ranges Model remain at 2017/18 values or whether these are further reduced in order to support balancing the High Needs Block. As stated in Document IB, the figures for the High Needs Block summarised for this meeting include the assumption that the values of Plus funding allocated by the Ranges Model are reduced by 1.5%, reducing spending by c. £0.3m in 2018/19. The HNB trajectory evidences the need for continued control of Top Up values.

Details of the Item for Consideration

For reference, the table below summarises the values of Top Up that would be allocated following a 1.5% reduction (repeat of the information included within the consultation document).

Range	Plus Funding (annual value) 2017/18	Value of a 1.5% Reduction
Range 1	£0	n/a
Range 2	£0	n/a
Range 3	£0	n/a
Range 4A	£966.16	- £14
Range 4B	£3,045.23	- £46
Range 4C	£4,666.60	- £70
Range 4D	£7,269.52	- £109
Range 5	£10,599.32	- £159
Range 6	£14,122.18	- £212
Range 7	£23,205.05	- £348

SEND Review Proposals and Consultation

Forum Members are asked to note that a full presentation of the SEND Review proposals and consultation will be made to the meeting 10 January 2018.

Wider SEMH Review (Alternative Provision Review)

Forum Members are asked to note that a fuller presentation of the position of the wider SEMH review will be made to the meeting 10 January 2018.

This review incorporates the redesign of alternative provisions and the re-shaping of financial responsibilities between the High Needs Block and delegated school and academy budgets. Members are aware that the Authority's consultation on High Needs Block funding arrangements for 2018/19 included specifically the proposal to cease the HNB's double funding of the top up element of placements of non-EHCP pupils in the primary behaviour centres and Bradford Central PRU from 1 September 2018. The proposal crystallises the discussions that began with the Forum in autumn 2016. Under this model, the HNB will continue to fund an agreed number of places at £10,000 with the cost of any further top up being financed by the commissioning school / academy, or Behaviour Attendance Collaborative (BAC).

The wider SEMH review also brings in the financing of Bradford District PRU, as signalled in the consultation document, and the intention for the High Needs Block to cease its double funding of non-EHCP placements at this setting also from 1 September 2018. Further financial information on this is included in Document IB.

It is assumed that the Schools Forum will not recommend a further contribution, by top-slice, from the Schools Block in 2018/19 to meet High Needs Block pressures. This is a clear steer that has come from previous discussion in the Forum as well as from feedback to our consultations. Members will understand then that decisions around the allocation of the High Needs Block are crucial in balancing this budget. Decisions such as the removal of double funding of the non-EHCP placement Plus element in alternative provisions also have the effect of transferring financial responsibility from the High Needs Block to the Schools Block and the SEMH review's focus on the development of effective universal provision across all schools and academies is crucial in this context.

Permanent Exclusions – Primary Phase Local Agreement

A key aim of the wider SEMH review is to develop and implement a local agreement to support the financial management of pupils that are permanently excluded in the primary phase. In addition to the adjustment that is made by Regulations to the formula funding of schools and academies that permanently exclude a pupil, local agreements define additional financial adjustments that are made in order to support the cost of provision as well as the inclusion of pupils back into mainstream settings. Local agreements are well developed within the BACs in our secondary phase and are being widely developed across phases in other authorities.

The Authority proposes that the basis for a local agreement for the primary phase be that a school or academy will pay £8,000 per permanent exclusion to the Authority. This money will then support the provision made across the Authority in the Behaviour Centres, allow reintegration and assessment support and allow some monies to follow the child into their next setting to support the school that the pupil transfers to.

The Authority would welcome the School Forum's initial feedback on this proposal as well as the Forum's support for the development of a local agreement in the primary phase.

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

Yes – direct consequences for the High Needs Block as set out in summary in Document IB.

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 consider the outcomes of the consultation and whether any of the proposals should be changed in the light of responses. Members will be asked to make final recommendations on the structure of the formulae on 10 January 2018. As such, Members are asked to consider whether sufficient information has now been provided to enable these final recommendations to be made.

List of Supporting Appendices / Papers (where applicable)

Appendix 1 – Summary of Consultation Proposals
Appendix 2 – Summary of Bradford-located commissioned places 2018/19 (updated)
Appendix 3 – Analysis of Consultation Responses (to be tabled at the meeting)

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High Needs Block Consultation 2018/19 - Summary

The Authority proposes to make only targeted adjustments to Bradford's Place-Plus system for the 2018/19 financial year, with the purposes of:

- **Complying with the directed change from the DfE for the transfer of the funding of element 1 (the first £4,000 of the place-element) to the Schools Block formula for resourced provisions**, meaning that places occupied when the October 2017 census is taken will be funded in 2018/19 at £6,000. Places not occupied in the October 2017 census will continue to be funded at £10,000 as now.
- **Responding to the implications of the primary & secondary National Funding Formula (NFF) on the calculation of the 'notional SEN', and the knock on impact to the SEN Funding Floor**, where we choose to implement NFF at April 2018. As the value of funding allocated via the SEN low prior attainment factor under the NFF is significantly increased, the values of notional SEN in schools are also significantly increased and the eligibility for the SEN Funding Floor is significantly decreased. We do not propose to adjust our notional SEN calculation to compensate for this; schools will see their notional SEN allocations increase where we implement NFF in 2018/19. However, we do propose that we protect the values of SEN Floor allocations for individual schools in 2018/19 so that schools receive at least the values they have received in 2017/18 under this factor. This is important in particular for the primary sector. Please also be aware that the Schools Forum is currently considering whether further support for SEND can be provided for primary schools and academies through the Floor mechanism in 2018/19 by using primary phase headroom within the Schools Block. This would require the transfer of headroom from the Schools Block to the High Needs Block. The continuation of our SEN Floor approach will be reviewed for 2019/20.
- **Implementing the changes that have been set out and considered by the Schools Forum and other working groups already.** These are:
 - **The cessation of the High Needs Block's funding of Top Up (the Plus element) for the placement of pupils in alternative provision settings without EHCPs that remain on the roll of mainstream schools.** This especially affects the HNB direct funding positions of Bradford Central PRU and the Primary Behaviour Centres. It is proposed that the Top Up funding from the HNB will cease at 1 September 2018 with the expectation that these settings will develop direct financial relationships with the schools (or BACs) that commission places. Please note that the HNB will continue to fund the place-element at £10,000 in 2018/19. This proposal seeks purely to correct the current 'double funding' of these placements (the HNB pays Top Up as well as the commissioning schools retaining in full its AWPU funding). **Please also note that the position of the HNB's funding of non-EHCP placements specifically in District PRU is subject to the outcomes of the Authority's wider alternative provision review.**
 - **The full establishment of Bradford's Place-Plus model for the funding of the newly developed early years DSP provision**, replacing previous temporary methodologies that have been in place for the funding of Children's Centre Plus provisions.
- **The Authority proposes that the specific resources for inclusion in Early Years settings, which are required to be established by the DfE following its national early years funding reform, will be fully funded from the Early Years Block from April 2018.** Therefore, the allocation of Early Years Inclusion monies is a matter picked up by the separate Early Years Block consultation rather than here.
- Please note that the values of formula factors quoted in the consultation document e.g. the values of **'Plus' funding by Range**, are indicative only for 2018/19. In particular, these values **will be subject to the School Forum's management of spending pressures within the High Needs Block.**

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Setting	Type (AP or SEND) *	17/18 Initial Planned Budget AY Funded Places (FTE)	18/19 FY Apr- Aug Updated Planned Places (FTE)	18/19 AY Sept- Mar Initial Planned Places (FTE)	Diff 18/19 AY vs. 17/18 AY
Bradford Central PRU	AP	50.0	50.0	50.0	0.0
Bradford District PRU	AP	160.0	160.0	160.0	0.0
Ellar Carr	AP	54.0	70.0	70.0	16.0
Primary PRU	AP	50.0	56.0	56.0	6.0
Willow Centre	AP	10.0	10.0	10.0	0.0
Horizons Centre	AP	10.0	10.0	10.0	0.0
Long View Centre	AP	10.0	10.0	10.0	0.0
Phoenix Centre	AP / SEND	20.0	20.0	20.0	0.0
Early Years Enhanced Specialist Places	SEND	68.0	78.0	78.0	10.0
ARC - Gillington Primary School	SEND	17.0	20.0	20.0	3.0
ARC - Swain House Primary School	SEND	20.0	20.0	20.0	0.0
ARC - Grove House Primary School	SEND	12.0	12.0	12.0	0.0
ARC - Hanson School	SEND	40.0	42.0	48.0	8.0
Special - Beechcliffe School	SEND	120.0	140.0	144.0	24.0
Special - Chellow Heights School	SEND	195.0	235.2	243.2	48.2
Special - Delius School	SEND	119.0	131.2	131.2	12.2
Special - Beckfoot Hazelbeck Academy	SEND	131.0	140.0	140.0	9.0
Special - High Park School	SEND	116.0	123.0	130.0	14.0
Special - Beckfoot Phoenix Primary Special School	SEND	78.0	87.2	97.0	19.0
Special - Southfield Academy	SEND	255.0	264.0	287.0	32.0
Special - Oastler School	SEND	90.0	94.0	94.0	4.0
DSP - Carrwood Primary School	SEND	0.0	4.0	4.0	4.0
DSP - Denholme Primary School	SEND	8.0	8.0	8.0	0.0
DSP - Green Lane Primary School	SEND	13.0	20.0	24.0	11.0
DSP - High Craggs Primary Academy	SEND	6.0	6.0	6.0	0.0
DSP - Crossflatts Primary School	SEND	12.0	16.0	16.0	4.0
DSP - Beckfoot Academy	SEND	10.0	10.0	10.0	0.0
DSP - Oasis Academy (Lister Park)	SEND	4.0	4.0	4.0	0.0
DSP - Grange Campus	SEND	9.0	12.0	12.0	3.0
DSP - Parkside School	SEND	13.0	12.0	12.0	-1.0
DSP - The Holy Family Catholic School	SEND	13.0	16.0	16.0	3.0
DSP - Beckfoot Thornton Academy	SEND	14.0	14.0	14.0	0.0
DSP - Titus Salt School	SEND	16.0	30.0	30.0	14.0
DSP - Bradford Academy	SEND	22.0	27.0	27.0	5.0
DSP - Bradford Forster Academy	SEND	6.0	6.0	6.0	0.0
DSP - Haworth Primary Academy	SEND	6.0	8.0	10.0	4.0
DSP - Crossley Hall Primary School	SEND	0.0	8.0	12.0	12.0
DSP - Long Lee Primary School	SEND	0.0	10.0	10.0	10.0
Worth Valley New ASD Primary	SEND	0.0	8.0	8.0	8.0
New ASD Primary 2	SEND	0.0	0.0	8.0	8.0
Cottingley Village Primary School (new SEMH)	SEND	0.0	10.0	10.0	10.0
New SEMH Secondary	SEND	0.0	0.0	20.0	20.0
Education in Hospital - Airedale	SEND	7.0	7.0	7.0	0.0
Education in Hospital - BRI	SEND	16.0	16.0	16.0	0.0
Tracks	SEND	26.0	26.0	26.0	0.0
Further Education - Bradford College**	SEND	133.0	133.0	173.0	40.0
Further Education - Shipley College**	SEND	94.0	94.0	102.0	8.0
Further Education - Aspire-Igen**	SEND	8.0	46.0	85.0	77.0
Post 16 in mainstream Bradford settings (schools and academies)	SEND	38.0	38.0	38.0	0.0
Additional Unallocated Places within 2018/19 DSG HNB (Special schools)	SEND	280.0	10.0	10.0	-270.0
Total Initial Planned Places 2018/19 Financial Year		2,379.0	2,371.6	2,554.4	175.4

* There is cross over between AP and SEND in some provisions in Bradford. The type recorded here is based on the main designation of the setting.

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

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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 provides Forum members with updated indicative modelling of Primary and Secondary delegated budgets for 2018/19, using the pupil numbers taken from the October 2017 Census. This is tabled for information at this stage, prior to asking members to make final recommendations in the meeting to be held on 10 January 2018.

Date(s) of any Previous Discussion at the Forum

The consultation on Primary and Secondary formula funding arrangements for 2018/19 was discussed at the last Forum meeting.

Background / Context

At the meeting held on 18 October 2017, members discussed and approved the consultation document, which outlined the proposals for the formulae to be used to calculate delegated formula funding allocations for Primary and Secondary schools and academies in 2018/19. This consultation document incorporated modelling:

- Using October 2016 pupil numbers, adjusted in some schools for a) the cessation of the reception uplift in the primary sector under NFF, b) the transfer of resourced provision pupil back into main formula funding and c) additional growth for newly establishing schools.
- Using October 2016 data i.e. the data (such as FSM, EAL, IDACI) that was used to calculate 2017/18 financial year allocations.
- On a 0% Minimum Funding Guarantee.
- On a + 3% Ceiling.
- Assuming that the National Funding Formula is used rather than our previous local formula and that the NFF can be afforded in full.
- That the DfE's per pupil minimum floors can also be afforded in full at £3,500 (primary), £4,800 (secondary) or £4,042 (all through).
- Assuming that our 'disapplication' requests will be accepted by the Secretary of State.

Details of the Item for Consideration

The modelling, shown in Appendices 1a, 1b and 1c provides members with an updated view of Primary and Secondary school and academy indicative (estimated) formula funding allocation totals in 2018/19 now using pupil numbers taken from the October 2017 Census.

The modelling is based on the same assumptions as those used to construct the modelling, which accompanied the consultation document. These assumptions are listed above. The only difference is the use of October 2017 Census numbers.

For clarity, these indicative allocations for individual schools and academies have not yet been updated for other data changes (e.g. Ever 6 FSM %, IDACI, EAL, etc.) as the October 2017 Census Dataset will not be made available by the EFA until later in December. Please also note that not all Census information for academies has been released. Therefore, a number of academy allocations are still based on estimated numbers.

Please note that the allocations exclude early years, high needs and post 16 funding i.e. these just show Reception – Year 11 primary and secondary mainstream formula funding.

Details of the Item for Consideration

The main factors that will influence variances for individual schools and academies, not yet built into the modelling (mainly because the data is not yet available), are:

- Final decisions on the 6 areas for consideration set out in the consultation document e.g. whether we move to NFF at April 2018.
- Changes in individual setting data, such as Ever 6 FSM, EAL, SEN attainment, as recorded in the October 2017 Census.
- The application of the weighting to be prescribed by the DfE for the secondary phase prior attainment factor for year 7.
- Decisions about the level of Minimum Funding Guarantee and use of Schools Block Headroom.
- Pupil Premium allocations, which will be based on January 2018 Census pupil numbers.
- Growth Funding allocations, which will be based on final October 2017 census numbers and the final base £app values within our 2018/19 mainstream funding formula.

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

This is an item for information. The implications for the DSG are set out in separate reports to this meeting (Document IB).

Recommendations

The Forum is asked to note the Primary and Secondary modelling information. A further update will be provided on 10 January, when Forum Members will be asked to make final recommendations on the values of funding allocated via each formula factor.

Members are asked to consider whether sufficient information has been provided to enable final recommendations to be taken on 10 January 2018 on the matters presented in this report.

List of Supporting Appendices / Papers (where applicable)

- Appendix 1a - Indicative Variances Analysis 2018/19 - Individual Primary School / Academy Modelling
- Appendix 1b - Indicative Variances Analysis 2018/19 - Individual Secondary School / Academy Modelling
- Appendix 1c – Indicative Variances Analysis 2018/19 – Individual All Through Schools Modelling

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		2017/18 Actuals				2018/19 Estimated - see notes below				Variances				Adjustments		Formula Funding & Cont (Inc. MFG & Ceiling)						
Phase	School	Formula Funding (including MFG & Ceiling)	Growth Fund / Safeguarded Salaries	Pupil Premium (July 2017)	Total 2017/18 Actual	Formula Funding (including MFG & Ceiling)	Growth Fund / Safeguarded Salaries	Pupil Premium	Total 2018/19 Estimated	Formula Funding (including MFG & Ceiling)	Growth Fund / Safeguarded Salaries	Pupil Premium	Total Variances	MFG figures to the left (included in)	Ceiling figures to the left (included in)	2017/18 £app	2018/19 £app	£app Variance	Pupil Number Difference	2018/19 No.s (Estimate of October 2017)		
PRIMARY	Addingham Primary School	806,575	631	24,600	831,807	853,147	34,187	25,625	912,959	46,571	33,556	1,025	81,153	58,238	0	3,881	3,997	116	14	222		
PRIMARY	All Saints' CE Primary School (Bradford)	2,717,056	0	308,880	3,025,936	2,712,527	0	303,512	3,016,040	-4,528	0	-5,368	-9,896	0	0	4,306	4,361	55	-9	622		
PRIMARY	All Saints' CE Primary School (Ilkley)	1,138,145	0	32,520	1,170,665	1,127,141	0	32,057	1,159,198	-11,003	0	-463	-11,467	65,347	0	3,602	3,613	11	-4	312		
RECOUPMENT ACADEMY	Beckfoot Allerton Primary Academy	1,725,473	0	189,760	1,915,233	1,714,123	0	187,602	1,901,724	-11,351	0	-2,158	-13,509	94,362	0	4,099	4,111	12	-4	417		
RECOUPMENT ACADEMY	Appleton Academy	1,530,601	0	238,185	1,768,786	1,536,302	0	238,185	1,774,487	5,701	0	0	5,701	0	0	3,761	3,775	14	0	407		
PRIMARY	Ashlands Primary School	1,556,642	41,641	79,300	1,677,583	1,506,715	14,370	75,452	1,596,538	-49,926	-27,271	-3,848	-81,045	0	0	3,584	3,622	38	-26	420		
RECOUPMENT ACADEMY	Atlas School	1,020,019	0	92,400	1,112,419	1,012,139	0	91,520	1,103,659	-7,879	0	-880	-8,759	44,572	0	4,834	4,866	32	-3	208		
PRIMARY	Baildon CE Primary School	1,433,351	1,024	41,640	1,476,015	1,445,582	1,024	42,078	1,488,684	12,231	0	438	12,669	0	0	3,507	3,511	4	3	412		
PRIMARY	Bankfoot Primary School	1,094,739	0	80,360	1,175,099	1,099,403	0	80,360	1,179,763	4,664	0	0	4,664	61,783	0	4,487	4,506	19	0	244		
RECOUPMENT ACADEMY	Barkerend Academy	1,904,777	46,984	215,580	2,167,341	1,875,859	13,051	212,171	2,101,082	-28,917	-33,933	-3,409	-66,259	28,732	0	4,528	4,455	-73	-7	424		
PRIMARY	Ben Rhydding Primary School	824,575	2,048	15,100	841,723	815,916	2,048	14,916	832,879	-8,659	0	-184	-8,843	49,211	0	3,827	3,858	31	-4	212		
PRIMARY	Blakehill Primary School	1,554,470	5,500	117,880	1,677,850	1,556,087	5,500	117,631	1,679,217	1,617	0	-249	1,367	3,133	0	3,723	3,745	22	-2	417		
PRIMARY	Bowling Park Primary School	2,758,554	0	378,360	3,136,914	2,821,097	0	374,250	3,195,347	62,543	0	-4,110	58,433	0	0	4,435	4,565	130	-4	618		
PRIMARY	Brackenhill Primary School	1,828,791	0	191,400	2,020,191	1,839,097	0	194,700	2,033,797	10,306	0	3,300	13,606	42,069	0	4,439	4,453	14	1	413		
RECOUPMENT ACADEMY	Bradford Academy	1,560,884	0	196,198	1,757,082	1,636,166	0	196,198	1,832,364	75,283	0	0	75,283	0	0	3,826	3,868	42	15	423		
RECOUPMENT FREE SCH	Bradford Girls Grammar (Free School)	1,316,897	0	88,440	1,405,337	1,404,910	0	88,440	1,493,350	88,013	0	0	88,013	0	0	3,377	3,575	198	3	393		
PRIMARY	Burley & Woodhead CE Primary School	822,121	0	11,280	833,401	822,926	0	11,329	834,256	805	0	49	855	55,516	0	3,789	3,810	21	-1	216		
PRIMARY	Burley Oaks Primary School	1,468,338	7,153	37,980	1,513,471	1,536,578	0	37,980	1,574,558	68,240	-7,153	0	61,087	0	0	3,439	3,573	134	1	430		
PRIMARY	Byron Primary School	2,697,042	0	246,840	2,943,882	2,688,274	0	244,478	2,932,752	-8,767	0	-2,362	-11,130	0	0	4,261	4,329	68	-12	621		
PRIMARY	Carrwood Primary School	1,733,188	2,048	289,980	2,025,215	1,720,530	2,048	285,704	2,008,281	-12,658	0	-4,276	-16,934	112,866	0	5,149	5,173	24	-4	333		
PRIMARY	Cavendish Primary School	1,837,098	2,949	303,300	2,143,346	1,838,504	2,949	306,786	2,148,239	1,406	0	3,486	4,892	445	0	4,269	4,273	3	0	431		
RECOUPMENT ACADEMY	Christ Church Primary Academy	934,432	0	130,680	1,065,112	951,965	0	132,063	1,084,028	17,533	0	1,383	18,915	57,647	0	4,867	4,932	66	1	193		
RECOUPMENT ACADEMY	Clayton St John's CE Primary Academy	1,578,653	0	142,400	1,721,053	1,586,644	0	143,736	1,730,380	7,992	0	1,336	9,327	54,162	0	3,786	3,787	1	2	419		
PRIMARY	Clayton Village Primary School	942,320	0	91,660	1,033,980	923,270	0	89,917	1,013,187	-19,050	0	-1,743	-20,792	65,620	0	4,530	4,571	40	-6	202		
RECOUPMENT ACADEMY	Copthorne Primary	1,773,617	0	139,920	1,913,537	1,835,865	0	137,949	1,973,814	62,248	0	-1,971	60,277	0	0	4,193	4,279	86	6	429		
PRIMARY	Cottingley Village Primary School	1,562,596	0	124,640	1,687,236	1,584,567	0	124,369	1,708,936	21,971	0	-271	21,701	58,790	0	3,747	3,746	-1	6	423		
PRIMARY	Crossflatts Primary School	1,443,651	0	76,700	1,520,351	1,503,310	0	77,171	1,580,482	59,660	0	471	60,131	0	0	3,521	3,554	33	13	423		
PRIMARY	Crossley Hall Primary School	2,426,478	0	271,180	2,697,658	2,559,021	0	279,896	2,838,917	132,544	0	8,716	141,260	0	0	4,127	4,223	96	18	606		
PRIMARY	Cullingworth Village Primary School	1,021,061	18,272	67,160	1,106,492	1,083,943	19,232	72,648	1,175,823	62,882	960	5,488	69,331	52,527	0	4,028	3,997	-31	18	276		
RECOUPMENT ACADEMY	Denholme Primary	837,970	0	90,940	928,910	882,957	0	87,420	970,377	44,987	0	-3,520	41,467	41,532	0	4,364	4,328	-36	12	204		
RECOUPMENT ACADEMY	Dixons Allerton Academy	940,835	60,416	75,643	1,076,894	1,269,953	35,416	95,325	1,400,694	329,117	-25,000	19,682	323,800	0	0	3,681	3,908	227	62	334		
RECOUPMENT ACADEMY	Dixons Marchbank Academy	1,874,853	0	255,180	2,130,033	1,892,051	0	255,180	2,147,231	17,198	0	0	17,198	70,964	0	4,529	4,526	-2	4	418		
RECOUPMENT FREE SCH	Dixons Music Primary	1,261,156	0	56,600																		

		2017/18 Actuals				2018/19 Estimated - see notes below				Variances				Adjustments		Formula Funding & Cont (Inc. MFG & Ceiling)					
Phase	School	Formula Funding (including MFG & Ceiling)	Growth Fund / Safeguarded Salaries	Pupil Premium (July 2017)	Total 2017/18 Actual	Formula Funding (including MFG & Ceiling)	Growth Fund / Safeguarded Salaries	Pupil Premium	Total 2018/19 Estimated	Formula Funding (including MFG & Ceiling)	Growth Fund / Safeguarded Salaries	Pupil Premium	Variances	MFG figures to the left)	Ceiling figures to the left)	2017/18 £app	2018/19 £app	£app Variance	Pupil Number Difference	2018/19 No.s (Estimate of October 2017)	
PRIMARY	Low Ash Primary School	1,603,527	0	116,580	1,720,107	1,611,972	0	116,843	1,728,815	8,445	0	263	8,708	36,753	0	3,818	3,820	2	2	422	
PRIMARY	Low Moor CE Primary School	1,562,136	0	116,260	1,678,396	1,570,263	0	116,757	1,687,020	8,127	0	497	8,624	33,685	0	3,773	3,775	1	2	416	
PRIMARY	Lower Fields Primary School	1,902,522	1,940	244,500	2,148,962	1,896,357	1,940	241,011	2,139,308	-6,166	0	-3,489	-9,654	85,158	0	4,578	4,585	7	-2	414	
RECOUPMENT ACADEMY	Margaret McMillan Primary School	2,517,352	0	191,980	2,709,332	2,514,255	0	184,266	2,698,521	-3,097	0	-7,714	-10,811	0	-8,811	4,113	4,254	141	-21	591	
PRIMARY	Marshfield Primary School	1,755,668	0	121,440	1,877,108	1,741,293	0	120,859	1,862,152	-14,375	0	-581	-14,956	59,149	0	4,141	4,186	45	-8	416	
PRIMARY	Menston Primary School	1,436,031	42,286	29,600	1,507,916	1,546,286	34,455	30,504	1,611,245	110,255	-7,831	904	103,328	0	0	3,528	3,634	106	16	435	
RECOUPMENT ACADEMY	Merlin Top Primary Academy	1,503,661	0	265,560	1,769,221	1,481,819	0	261,596	1,743,414	-21,842	0	-3,964	-25,806	101,733	0	4,804	4,811	7	-5	308	
PRIMARY	Miriam Lord Community Primary School	1,608,410	0	147,840	1,756,250	1,558,737	0	138,190	1,696,927	-49,673	0	-9,650	-59,323	31,219	0	4,335	4,354	19	-13	358	
PRIMARY	Myrtle Park Primary School	839,445	0	28,600	868,045	839,600	0	28,479	868,080	155	0	-121	34	46,197	0	3,851	3,851	1	0	218	
PRIMARY	Nessfield Primary School	1,604,890	0	117,480	1,722,370	1,505,614	0	109,919	1,615,533	-99,277	0	-7,561	-106,837	59,727	0	3,924	3,983	59	-31	378	
PRIMARY	Newby Primary School	1,802,563	0	161,620	1,964,183	1,796,670	0	161,242	1,957,912	-5,892	0	-378	-6,271	1,844	0	4,261	4,268	6	-2	421	
PRIMARY	Newhall Park Primary School	1,671,319	0	165,560	1,836,879	1,704,266	0	169,931	1,874,197	32,947	0	4,371	37,318	63,850	0	4,231	4,229	-2	8	403	
RECOUPMENT ACADEMY	Oakworth Primary Academy	1,472,970	0	71,540	1,544,510	1,478,582	0	72,072	1,550,654	5,611	0	532	6,143	0	0	3,499	3,512	13	0	421	
PRIMARY	Oldfield Primary School	389,041	0	18,480	407,521	398,392	0	17,627	416,019	9,351	0	-853	8,498	82,938	0	6,484	6,426	-58	2	62	
PRIMARY	Our Lady & St Brendan's Catholic Primary School	915,943	0	113,520	1,029,463	885,426	0	108,114	993,540	-30,516	0	-5,406	-35,922	0	0	4,383	4,427	45	-9	200	
RECOUPMENT ACADEMY	Our Lady of Victories Catholic Primary Academy	956,326	0	62,340	1,018,666	978,620	0	62,925	1,041,545	22,294	0	585	22,879	0	0	4,490	4,531	41	3	216	
RECOUPMENT ACADEMY	Oxenhope CE Primary Academy	780,510	0	33,000	813,510	767,282	0	32,343	799,625	-13,228	0	-657	-13,885	51,933	0	3,883	3,895	12	-4	197	
PRIMARY	Parkland Primary School	1,156,270	0	179,940	1,336,210	1,202,295	17,950	188,383	1,408,628	46,024	17,950	8,443	72,418	90,933	0	5,071	5,127	56	10	238	
RECOUPMENT ACADEMY	Parkwood Primary School	1,047,910	0	101,640	1,149,550	1,091,456	0	103,693	1,195,150	43,547	0	2,053	45,600	158,166	0	5,374	5,403	29	7	202	
PRIMARY	Peel Park Primary School	2,522,272	2,048	295,680	2,819,999	2,595,587	2,048	296,691	2,894,325	73,351	0	1,011	74,326	92,898	0	4,429	4,425	-3	17	587	
PRIMARY	Poplars Farm Primary School	910,673	0	63,940	974,613	934,169	0	66,038	1,000,207	23,495	0	2,098	25,593	30,401	0	4,357	4,365	8	5	214	
RECOUPMENT ACADEMY	Beckfoot Priestthorpe Primary School	770,858	0	58,500	829,358	771,249	0	60,000	831,249	392	0	1,500	1,892	52,124	0	4,259	4,261	2	0	181	
PRIMARY	Princeville Primary School and Children's Centre	2,542,894	0	270,600	2,813,494	2,390,777	48,355	250,744	2,689,876	-152,117	48,355	-19,856	-123,618	0	0	4,303	4,492	189	-48	543	
RECOUPMENT FREE SCH	Rainbow Primary Free School	1,603,523	0	155,760	1,759,283	1,754,125	0	167,985	1,922,111	150,603	0	12,225	162,828	0	0	4,608	4,728	120	23	371	
RECOUPMENT ACADEMY	Reevy Hill Primary School	1,038,089	0	163,680	1,201,769	1,038,802	0	163,680	1,202,482	713	0	0	713	67,392	0	5,165	5,168	4	0	201	
PRIMARY	Riddlesden St Mary's CE Primary	1,491,724	0	152,100	1,643,824	1,525,980	0	152,914	1,678,894	34,256	0	814	35,070	0	0	4,043	4,069	27	6	375	
PRIMARY	Russell Hall Primary School	885,035	0	83,440	968,475	878,010	0	83,440	961,450	-7,025	0	0	-7,025	51,139	0	4,116	4,122	6	-2	213	
RECOUPMENT ACADEMY	Ryecroft Primary Academy	1,451,512	49,333	232,320	1,733,166	1,356,468	28,319	215,785	1,600,572	-95,045	-21,014	-16,535	-132,594	97,994	0	5,341	5,306	-35	-20	261	
PRIMARY	Saltaire Primary School	1,586,832	0	114,060	1,700,892	1,560,786	0	112,267	1,673,053	-26,047	0	-1,793	-27,840	62,789	0	3,690	3,699	8	-8	422	
PRIMARY	Sandal Primary School and Nursery	1,446,392	0	58,520	1,504,912	1,483,383	0	60,275	1,543,658	36,991	0	1,755	38,746	73,062	0	3,589	3,583	-6	11	414	
PRIMARY	Sandy Lane Primary School	1,227,213	0	119,380	1,346,593	1,224,658	0	118,205	1,342,863	-2,556	0	-1,175	-3,730	38,102	0	4,118	4,123	5	-1	297	
RECOUPMENT ACADEMY	Shibden Head Primary Academy	1,497,250	0	89,120	1,586,370	1,477,866	0	88,074	1,565,940	-19,384	0	-1,046	-20,430	16,148	0	3,531	3,536	4	-6	418	
PRIMARY	Shipley CE Primary School	872,151	0	75,820	947,971	876,045	0	75,820	951,865	3,894	0	0	3,894	50,467	0	4,318	4,315	-2	1	203	
RECOUPMENT ACADEMY	Shirley Manor Primary Academy	891,125	0	115,100	1,006,225	955,688	0	121,379	1,077,067	64,562	0	6,279	70,841	76,288	0	4,923	4,876	-47	15	196	
PRIMARY	Silsden Primary School	2,118,945	3,252	107,180	2,229,377	2,088,219	35,306	110,738	2,234,266	-30,726	32,053	3,558	4,886	20,218	0	3,859	3,732	-127	19	569	
RECOUPMENT ACADEMY	Southmere Primary Academy	1,729,424	8,614	257,980	1,996,017	1,687,488	0	248,764	1,936,252	-41,935	-8,614	-9,216	-59,765	12,334	0	4,514	4,536	22	-13	372	
RECOUPMENT ACADEMY	Dixons Manningham Primary Academy	1,742,616	0	198,000	1,940,616	1,618,901	0	182,924	1,801,825	-123,715	0	-15,076	-138,791	508	0	4,423	4,448	25	-30	364	
RECOUPMENT ACADEMY	St Anne's Catholic Primary Academy	1,060,793	0	56,020	1,116,813	986,294	0	52,200	1,038,494	-74,499	0	-3,820	-78,319	13,125	0	4,176	4,215	39	-20	234	
PRIMARY	St Anthony's Catholic Primary School (Clayton)	899,880	0	63,040	962,920	888,937	0	62,004	950,941	-10,943	0	-1,036	-11,980	47,269	0	4,205	4,233	28	-4	210	
PRIMARY	St Anthony's Catholic Primary School (Shipley)	612,201	0	24,180	636,381	612,283	0	24,776	637,059	82	0	596	678	53,128	0	4,783	4,783	1	0	128	
PRIMARY	St Clare's Catholic Primary School	939,677	11,746	97,680	1,049,103	973,224	0	102,664	1,075,888	33,547	-11,746	4,984	26,785	34,143	0	4,805	4,724	-81	8	206	
PRIMARY	St Columba's Catholic Primary School	1,647,926	0	157,080	1,805,006	1,652,230	0	157,080	1,809,310	4,303	0	0	4,303	48,946	0	4,371	4,383	11	0	377	
PRIMARY	St Cuthbert & the First Martyrs' Catholic Primary	895,256	0	40,760	936,016	872,993	0	40,580	913,573	-22,263	0	-180	-22,443	27,134	0	4,263	4,279	16	-6	204	
PRIMARY	St Francis' Catholic Primary School	856,173	0	49,260	905,433	849,181	0	49,260	898,441	-6,992	0	0	-6,992	56,036	0	4,077	4,102	25	-3	207	
RECOUPMENT ACADEMY	St James' Church Primary School	1,474,230	14,356	219,120	1,707,706	1,354,002	0	199,135	1,553,137	-120,228	-14,356	-19,985	-154,569	32,843	0	4,849	4,853	4	-28	279	
RECOUPMENT ACADEMY	St John The Evangelist Catholic Primary	829,394	0	40,920	870,314	850,868	0	41,933	892,801	21,474	0	1,013	22,487	20,836	0	4,126	4,110	-16	6	207	
RECOUPMENT ACADEMY	St John's CE Primary School	1,737,746	0	189,360	1,927,106	1,749,734	0	189,360	1,939,094	11,988	0	0	11,988	80,371	0	4,147	4,146	-1	3	422	
PRIMARY	St Joseph's Catholic Primary School (Bingley)	810,250	0	14,360	824,610	800,395	0	14,208	814,604	-9,855	0	-152	-10,006	55,843	0	3,877	3,885	9	-3	206	
PRIMARY	St Joseph's Catholic Primary School (Bradford)	1,443,490	0	143,880	1,587,370	1,369,369	0	139,743	1,509,112	-74,121	0	-4,137	-78,259	38,695	0	4,469	4,505	35	-19	304	
RECOUPMENT ACADEMY	St Joseph's Catholic Primary, Keighley	1,136,103	0	109,700	1,245,803	1,105,470	13,984	105,007	1,224,460	-30,633	13,984	-4,693	-21,343	56,843	0	4,255	4,339	84	-9	258	
PRIMARY	St Luke's CE Primary School	928,622	0	79,200	1,007,822	929,321	0	80,723	1,010,044	699	0	1,523	2,222	57,110	0	4,380	4,384	3	0	212	
PRIMARY	St Mary's and St Peter's Catholic	985,212	0	121,440	1,106,652	972,476	0	118,492	1,090,968	-12,736	0	-2,948	-15,683	53,187	0	4,829	4,838	9	-3	201	
PRIMARY	St Matthew's Catholic Primary School	975,115	0	75,240	1,050,355	987,583	0	76,680	1,064,263	12,469	0	1,440	13,909	43,898	0	4,643	4,637	-7	3	213	
PRIMARY	St Matthew's CE Primary School	1,703,977	0	191,400	1,895,377	1,780,720	0	196,624	1,977,344	76,742	0	5,224	81,966	40,832	0	4,281	4,301	20	16	414	
RECOUPMENT ACADEMY	St Oswald's CE Primary Academy	1,796,803	0	219,420	2,016,223	1,753,035	0	213,699	1,966,734	-43,768	0	-5,721	-49,489	65,283	0	4,667	4,700	33	-12	373	
PRIMARY	St Paul's CE Primary School	885,025	0	76,080	961,105	877,731	0	75,156	952,887	-7,294	0	-924	-8,218	41,757	0	4,235	4,240	6	-2	207	
RECOUPMENT ACADEMY	St Philip's CE Primary Academy	942,528	0	87,120	1,029,648																

		2017/18 Actuals				2018/19 Estimated - see notes below				Variances				Adjustments		Formula Funding & Cont (Inc. MFG & Ceiling)					
Phase	School	Formula Funding (including MFG & Ceiling)	Growth Fund / Safeguarded Salaries	Pupil Premium (July 2017)	Total 2017/18 Actual	Formula Funding (including MFG & Ceiling)	Growth Fund / Safeguarded Salaries	Pupil Premium	Total 2018/19 Estimated	Formula Funding (including MFG & Ceiling)	Growth Fund / Safeguarded Salaries	Pupil Premium	Total Variances	MFG figures to the left	Ceiling figures to the left	2017/18 £app	2018/19 £app	£app Variance	Pupil Number Difference	2018/19 No.s (Estimate of October 2017)	
PRIMARY	Woodlands CE Primary School	489,816	0	20,380	510,196	482,806	0	20,191	502,998	-7,010	0	-189	-7,199	53,162	0	4,948	4,977	30	-2	97	
RECOUPMENT ACADEMY	Woodside Academy	1,824,757	27,755	288,920	2,141,432	1,833,349	0	290,321	2,123,670	8,592	-27,755	1,401	-17,762	88,306	0	4,552	4,483	-69	2	409	
RECOUPMENT ACADEMY	Worth Valley Primary	897,095	0	119,100	1,016,195	957,086	0	128,238	1,085,325	59,991	0	9,138	69,129	50,761	0	4,902	4,883	-19	13	196	
PRIMARY	Worthinghead Primary School	876,983	0	91,660	968,643	877,386	0	91,660	969,046	403	0	0	403	81,960	0	4,385	4,409	24	-1	199	
PRIMARY	Wycliffe CE Primary School	1,233,244	71,028	92,660	1,396,932	1,304,629	60,128	96,844	1,461,601	71,385	-10,900	4,184	64,669	54,323	0	4,141	4,086	-54	19	334	
PRIMARY TOTALS		231,006,414	835,335	22,049,306	250,982,395	232,767,204	656,137	21,981,621	252,437,947	1,760,789	-179,198	-67,685	1,513,906	6,545,228	-22,065	4,208	4,231	23	75	55,166	

Notes

Modelling does not include Early Years Single Funding Formula or High Needs Funding (mainstream primary DSG funding only)

2017/18 Actuals are based on figures included in the Section 251 Budget Statements, except for the Pupil Premium which uses the final figures updated in July by the DfE.

2018/19 Estimated figures are based on an estimate of October 2017 Census numbers, using the October 2016 dataset provided by the DfE for all other data e.g. FSM

Pupil Premium allocations ESTIMATES for 2018/19 are based on £1,320 per eligible Ever 6 FSM pupil, £300 per eligible service child, and £1,900 per eligible Adopted from Care pupil

Pupil Premium allocations do not include any funding allocated throughout the year for children who are Looked After

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		2017/18 Actuals				2018/19 Estimated - see notes below				Variances				Adjustments		Formula Funding & Cont (Inc. MFG & Ceiling)				
Phase	School	Formula Funding (including MFG & Ceiling)	Growth Fund / Safeguarded Salaries	Pupil Premium (July 2017)	Total 2017/18 Actual	Formula Funding (including MFG & Ceiling)	Growth Fund / Safeguarded Salaries	Pupil Premium	Total 2018/19 Estimated	Formula Funding (including MFG & Ceiling)	Growth Fund / Safeguarded Salaries	Pupil Premium	Total Variances	MFG (included in figures to the left)	Ceiling (included in figures to the left)	2017/18 £app	2018/19 £app	£app Variance	Pupil Number Difference from 17/18 to 18/19	2018/19 Funded No.s (Estimate of October 2017)
RECOUPMENT ACADEMY	Appleton Academy	4,515,697	0	373,483	4,889,180	4,620,730	0	382,416	5,003,146	105,033	0	8,934	113,967	0	0	5,582	5,594	12	17	826
RECOUPMENT ACADEMY	Beckfoot Academy	7,301,305	0	259,920	7,561,225	7,602,278	0	261,511	7,863,790	300,973	0	1,591	302,564	0	0	5,396	5,537	141	20	1,373
RECOUPMENT ACADEMY	Beckfoot Upper Heaton Academy	2,379,412	500,000	161,755	3,041,167	2,744,580	550,000	187,915	3,482,495	365,168	50,000	26,160	441,328	228,194	0	7,761	7,644	-117	60	431
RECOUPMENT ACADEMY	Belle Vue Girls' Academy	5,049,453	0	334,730	5,384,183	5,034,997	0	329,948	5,364,945	-14,456	0	-4,782	-19,238	0	0	5,543	5,613	70	-14	897
SECONDARY	Bingley Grammar School	7,141,426	2,048	311,350	7,454,823	7,256,139	2,048	311,972	7,570,159	114,713	0	622	115,336	0	0	4,788	4,868	80	-1	1,491
RECOUPMENT ACADEMY	Bradford Academy	6,303,950	0	486,677	6,790,627	6,594,629	0	497,288	7,091,917	290,679	0	10,611	301,290	0	0	5,674	5,734	60	39	1,150
RECOUPMENT FREE SCH	Bradford Girls Grammar (Free School)	2,869,763	0	125,380	2,995,143	2,943,007	10,719	130,603	3,084,330	73,245	10,719	5,223	89,187	0	0	5,445	5,322	-123	28	555
RECOUPMENT ACADEMY	Buttershaw Business & Enterprise College Academy	7,806,014	0	546,635	8,352,649	8,038,375	40,197	550,387	8,628,959	232,361	40,197	3,752	276,310	0	0	5,991	6,157	167	9	1,312
SECONDARY	Carlton Bolling College	7,058,347	0	534,485	7,592,832	7,626,648	0	569,990	8,196,638	568,301	0	35,505	603,806	23,269	0	5,882	5,871	-11	99	1,299
RECOUPMENT ACADEMY	Dixons Allerton Academy	6,719,273	0	517,560	7,236,832	6,611,517	0	514,935	7,126,452	-107,756	0	-2,624	-110,380	16,282	0	5,661	5,603	-58	-7	1,180
RECOUPMENT ACADEMY	Dixons City Academy	4,363,685	0	248,075	4,611,760	4,385,407	0	249,182	4,634,589	21,722	0	1,107	22,829	48,561	0	5,270	5,271	1	4	832
RECOUPMENT FREE SCH	Dixons McMillan Academy	2,261,444	0	94,435	2,355,879	2,861,932	0	127,124	2,989,056	600,488	0	32,689	633,177	114,915	0	5,565	5,500	-65	114	520
RECOUPMENT FREE SCH	Dixons Trinity Academy	3,057,319	0	187,270	3,244,589	3,068,550	0	186,967	3,255,517	11,231	0	-303	10,927	84,200	0	5,450	5,450	0	2	563
RECOUPMENT ACADEMY	Bradford Forster Academy	2,628,883	324,385	180,455	3,133,723	3,852,902	0	291,672	4,144,574	1,224,018	-324,385	111,217	1,010,850	0	0	6,570	5,860	-710	208	658
RECOUPMENT ACADEMY	Feversham College	3,439,355	0	220,660	3,660,015	3,623,135	0	232,508	3,855,643	183,780	0	11,848	195,628	172,482	0	5,780	5,769	-11	33	628
RECOUPMENT ACADEMY	Grange Technology College	9,257,362	0	617,100	9,874,462	9,874,898	40,197	633,801	10,548,895	617,536	40,197	16,701	674,433	0	0	6,349	6,532	182	60	1,518
SECONDARY	Hanson School	7,534,901	0	517,385	8,052,286	8,035,088	0	516,596	8,551,684	500,187	0	-789	499,398	0	-236,139	5,994	6,167	172	46	1,303
RECOUPMENT ACADEMY	Ilkley Grammar School	5,672,874	0	146,305	5,819,179	6,213,504	54,935	150,318	6,418,757	540,630	54,935	4,013	599,578	0	0	4,499	4,863	364	28	1,289
RECOUPMENT ACADEMY	Immanuel College Academy	5,922,871	0	328,415	6,251,286	5,931,650	0	328,415	6,260,065	8,779	0	0	8,779	0	0	5,032	5,092	59	-12	1,165
RECOUPMENT FREE SCH	Dixons Kings Academy	4,427,275	0	319,770	4,747,045	4,512,384	0	326,048	4,838,432	85,109	0	6,278	91,387	36,877	0	5,432	5,430	-2	16	831
RECOUPMENT ACADEMY	Laisterdyke Leadership Academy	4,930,362	0	374,000	5,304,362	5,000,745	0	370,468	5,371,213	70,384	0	-3,532	66,851	0	0	5,821	5,960	139	-8	839
RECOUPMENT ACADEMY	Beckfoot Oakbank Academy	6,919,542	0	496,150	7,415,692	7,188,360	0	502,170	7,690,530	268,818	0	6,020	274,839	0	0	5,254	5,393	139	16	1,333
RECOUPMENT ACADEMY	Oasis Academy Lister Park	4,487,404	20,694	362,313	4,870,410	4,845,165	20,098	386,746	5,252,010	357,762	-596	24,434	381,600	0	0	5,870	5,912	42	55	823
RECOUPMENT FREE SCH	One In A Million (Free School)	1,751,699	0	122,515	1,874,214	2,060,662	0	165,454	2,226,115	308,963	0	42,939	351,902	7,690	0	6,146	6,079	-68	54	339
SECONDARY	Parkside School	4,241,028	0	188,745	4,429,773	4,394,980	0	193,126	4,588,106	153,952	0	4,381	158,333	0	0	4,852	4,883	31	26	900
RECOUPMENT ACADEMY	Queensbury Academy	4,674,357	0	317,530	4,991,887	4,703,858	0	315,421	5,019,279	29,501	0	-2,109	27,392	0	0	5,217	5,267	51	-3	893
RECOUPMENT ACADEMY	Samuel Lister Academy	3,481,256	0	252,918	3,734,174	3,521,385	0	258,150	3,779,535	40,129	0	5,232	45,361	0	0	5,890	5,908	18	5	596
SECONDARY	St Bede's & St Joseph's Catholic College	8,282,145	0	421,315	8,703,460	7,914,549	0	403,261	8,317,810	-367,596	0	-18,054	-385,650	0	0	5,282	5,308	26	-77	1,491
SECONDARY	The Holy Family Catholic School	3,974,696	0	216,285	4,190,981	4,183,631	0	221,066	4,404,697	208,935	0	4,781	213,716	0	0	5,251	5,329	79	28	785
RECOUPMENT ACADEMY	Beckfoot Thornton Academy	6,580,531	0	456,490	7,037,021	6,875,017	0	463,847	7,338,864	294,486	0	7,357	301,843	0	-9,393	5,239	5,392	153	19	1,275
SECONDARY	Titus Salt School	7,020,557	1,024	381,405	7,402,986	7,449,756	1,024	389,685	7,840,465	429,199	0	8,280	437,479	0	0	5,886	6,018	133	45	1,238
RECOUPMENT ACADEMY	Tong Leadership Academy	6,814,507	0	547,605	7,362,112	6,581,611	0	518,694	7,100,304	-232,897	0	-28,911	-261,808	0	-85,188	6,571	6,799	228	-69	968
RECOUPMENT ACADEMY	University Academy Keighley	4,152,046	0	241,230	4,393,276	4,313,614	0	249,919	4,563,533	161,567	0	8,689	170,257	240,934	0	7,122	7,142	20	21	604
SECONDARY TOTALS		173,020,739	848,150	10,890,344	184,759,234	180,465,683	719,217	11,217,603	192,402,503	7,444,943	-128,933	327,259	7,643,269	973,404	-330,720	5,601	5,679	78	861	31,905

Notes

This analysis excludes High Needs and Post 16 funding (pre-16 mainstream DSG funding only).

2017/18 Actuals are based on figures included in the Section 251 Budget Statements, except for the Pupil Premium which uses the final figures updated in July by the DfE

2018/19 Estimated figures are based on an estimate of October 2017 Census numbers, using the October 2016 dataset provided by the DfE for all other data e.g. FSM

Pupil Premium allocations ESTIMATES for 2018/19 are based on £1,320 per eligible Ever 6 FSM pupil, £300 per eligible service child, and £1,900 per eligible Adopted from Care pupil

Pupil Premium allocations do not include any funding allocated throughout the year for children who are Looked After

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		2017/18 Actuals				2018/19 Estimated - see notes below				Variances				Adjustments		Formula Funding & Cont (Inc. MFG & Ceiling)				
Phase	School	Formula Funding (including MFG & Ceiling)	Growth Fund / Safeguarded Salaries	Pupil Premium (July 2017)	Total 2017/18 Actual	Formula Funding (including MFG & Ceiling)	Growth Fund / Safeguarded Salaries	Pupil Premium	Total 2018/19 Estimated	Formula Funding (including MFG & Ceiling)	Growth Fund / Safeguarded Salaries	Pupil Premium	Total Variances	MFG (included in figures to the left)	Ceiling (included in figures to the left)	2017/18 £app	2018/19 £app	£app Variance	Pupil Number Difference from 17/18 to 18/19	2018/19 Funded No.s (Estimate of October 2017)
RECOUPMENT ACADEMY	Appleton Academy	6,046,298	0	611,668	6,657,965	6,157,032	0	620,602	6,777,633	110,734	0	8,934	119,668	0	0	4,972	4,994	21	17	1,233
RECOUPMENT ACADEMY	Bradford Academy	7,864,834	0	682,875	8,547,709	8,230,795	0	693,486	8,924,281	365,961	0	10,611	376,573	0	0	5,178	5,233	55	54	1,573
RECOUPMENT FREE SCH	Bradford Girls Grammar (Free School)	4,186,660	0	213,820	4,400,480	4,347,917	10,719	219,043	4,577,679	161,257	10,719	5,223	177,200	0	0	4,566	4,598	32	31	948
RECOUPMENT ACADEMY	Dixons Allerton Academy	7,660,108	60,416	593,203	8,313,726	7,881,469	35,416	610,261	8,527,146	221,361	-25,000	17,058	213,419	16,282	0	5,292	5,229	-63	55	1,514
ALL THROUGH TOTALS		25,757,899	60,416	2,101,565	27,919,880	26,617,213	46,135	2,143,392	28,806,740	859,314	-14,281	41,827	886,859	16,282	0	5,052	5,061	10	157	5,268

Notes

This analysis excludes High Needs and Post 16 funding (pre-16 mainstream DSG funding only).

2017/18 Actuals are based on figures included in the Section 251 Budget Statements, except for the Pupil Premium which uses the final figures updated in July by the DfE

2018/19 Estimated figures are based on an estimate of October 2017 Census numbers, using the October 2016 dataset provided by the DfE for all other data e.g. FSM

Pupil Premium allocations ESTIMATES for 2018/19 are based on (£1,320 Prim; £935 Sec) per eligible Ever 6 FSM pupil, £300 per eligible service child, and £1,900 per eligible Adopted from Care pupil

Pupil Premium allocations do not include any funding allocated throughout the year for children who are Looked After

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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 Forum Members to further consider the position of the funding of Schools and Early Years Block central and de-delegated items from the DSG in 2018/19, following the initial report and discussion in the meeting of 18 October 2017.

Date (s) of any Previous Discussion at the Forum

An initial report on funds for 2018/19 was presented to the Schools Forum at the last meeting (18 October 2017 Document HZ). The Authority has also requested feedback from schools on centrally managed funds within the autumn 2017 consultations, including the criteria / methodology for the allocation of Growth Funding.

Background / Context

A detailed breakdown of current funds is given in Appendix 1. An analysis of per pupil contributions to de-delegated funds (maintained schools) within the Schools Block is provided in Appendix 2.

The table below provides a summary of the £app contributions in 2017/18.

2017/18 Fund	Early Years £app	Primary £app	Secondary £app
<i>Schools Forum Costs</i>	£0.11	<i>£0.11</i>	<i>£0.11</i>
<i>School Admissions</i>	n/a	<i>£6.71</i>	<i>£6.71</i>
<i>DSG Contribution to School Improvement</i>	£5.11	<i>£5.11</i>	<i>£5.11</i>
<i>Former ESG Funded Statutory Retained Duties</i>	n/a	<i>£15.51</i>	<i>£15.51</i>
ESBD School Support Team *	n/a	£9.10	n/a
Fischer Family Trust – School Licences *	n/a	£0.88	n/a
School Maternity / Paternity 'insurance' *	£36.57	£36.57	£36.57
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	£0.96	n/a
School Re-Organisation Costs *	n/a	£5.12	£0.37
Exceptional Circumstances / SIFD *	n/a	£2.61	n/a
Total £app maintained schools	£47.98	£87.94	£69.64
Total £app academies (* do not contribute)	£47.98	£27.44	£27.44
FSM Eligibility Assessments (FSM based) *	n/a	£5.80	£5.14

Within the new National Funding Formula framework, de-delegated funds remain funded by maintained primary and secondary schools within the Schools Block and from the Early Years Block for nursery schools. The non-de-delegated centrally managed funds previously funded from the Schools Block are now transferred into the newly created Central Schools Block. *The funds written in blue and italics in the table above are those that have been moved into the new Central Schools Block for the primary and secondary phases.* Forum Members are asked to note that the restrictions on the Schools Forum Costs and School Admissions funds, which limited the value of these funds to that in the previous year, have now been removed.

The information in this report is presented to continue the discussion with the Schools Forum on centrally managed and de-delegated funds. The Forum will be required to make its final recommendations for 2018/19 funds on 10 January 2018.

On the 5 July 2017, a communication from the CEO of BDAT regarding Trade Unions Facilities time was tabled. This communication asked for further consideration of the cost of arrangements going forward and how these engage in the academy sector. The Forum agreed that this be considered within the established review process, which informs the Schools Forum's annual decisions on de-delegation matters.

Details of the Item for Consideration

Summary of Parameters and Expectations for 2018/19

Forum Members are asked to note and to consider the following:

- Copyright licences must be managed centrally within the DSG (as this is a 'national' top-slice). The cost will be split pro-rata between the Central Schools, Early Years and High Needs Blocks.
- The Growth Fund will continue to be funded from the Schools Block according to agreed criteria with a planned budget value sufficient to cover expected costs of existing and new growth.
- The Forum agreed to the cessation of the DSG's Matched Contribution to School Improvement at September 2017. This funding will remain within the Central Schools Block. The Authority then anticipates that the Forum will agree to the proposal to use the headroom within the newly created Central Schools Block to support the management of cost pressures in the High Needs Block.
- The Authority expects that the Schools Forum will agree to the continuation of the pass back to the Authority of the ESG statutory retained duties funding within the Central Schools Block that was transferred into the DSG at April 2017.
- The Authority anticipates that the Schools Forum will agree to continue in 2018/19 the small budget for Schools Forum costs, and the DSG's funding of admissions, within the Central Schools Block.
- The Authority expects that costs of safeguarded salaries from re-organisation in maintained schools will continue to be funded on an actual cost basis in 2018/19 via de-delegation.
- Regarding de-delegation more widely, the Authority would generally expect, and recommend, the Forum to continue de-delegation in 2018/19, 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 FSM eligibility assessments and trade union facilities time.
- Representatives of maintained secondary schools agreed in the 2017/18 DSG round to the cessation of de-delegation for the Maternity / Paternity 'insurance' scheme, Fischer Family Trust, Exceptional Circumstances and School Staff Public Duties and Suspensions from the secondary phase. The Forum is not expected to revisit this decision.
- It is anticipated that the Forum will continue the maternity / paternity insurance scheme for nursery and primary schools as well as provision for FFT, public duties, exceptional circumstances and schools in financial difficulty, including provision for deficits of schools converting to academy status.
- Regarding the Forum's request for the review of the cost of Trade Union Facilities Time arrangements, the Forum is asked to clarify its expectation for the cost of arrangements going forward.
- Regarding de-delegation from the primary phase for behaviour support services, the Forum is asked to consider how continued de-delegation could be used to enact the removal of the double funding of the top up element to the primary behaviour centres in a way that provides financial stability for these centres in 2018/19, pending further review of financial models.

The Newly Created Central Schools Block & Headroom 2018/19

The DfE's 14 September 2017 announcement on National Funding Formula indicated that, on a 2017/18 baseline of £2.33m, our newly created Central Schools Block will increase to £2.82m over time, which represents an increase of £0.5m. The value of our Central Schools Block will increase further where the number of pupils recorded in Bradford's schools and academies continues to increase. However, our gain will be capped to maximum of c. 2.1% a year per pupil, meaning that our allocation will roughly increase by £50k a year, before pupil numbers.

In addition, the DfE has stated that it will fund the historic commitment element transferred into the Central Schools Block in full in 2018/19. This is £0.44m in Bradford (the remaining budget associated with the DSG's matched contribution to school improvement). In total therefore, before additional pupils are included, it is expected that our Central Schools Block allocation in 2018/19 will be in the region of £2.85m. However, the funding of historic commitments is time limited; the DfE has indicated that it expects its funding of these to unwind from April 2019 (and we have already ceased these commitments at September 2017). Therefore, we should view the £0.44m as a one off allocation, which will not be present in 2019/20. The table below lists the commitments that are already present within the Central Schools Block and that are expected to continue:

Commitment	Value
Primary & Secondary Copyright Licences (estimated cost – confirmed in December)	£455,880
Admissions (value in 17/18)	£577,600
Retained Statutory Duties (ESG transferred into DSG April 2017) (value in 17/18)	£1,331,100
Schools Forum (value in 17/18)	£10,000
Total Commitments 2018/19	£2,374,500

Details of the Item for Consideration (continued)

On this indicative basis, it is estimated that there is £0.476m of headroom (unallocated budget) within the Central Schools Block in 2018/19, of which £0.44m will be in place for 2018/19 only. This will be confirmed later in December 2017. Linked with the discussions on the financial pressure within the High Needs Block, the Authority proposes that this headroom, as well as the year on year growth in the on-going value of the Central Schools Block, is earmarked to enable the transfer, incrementally over time, of the majority of the following budgets that are currently met by the High Needs Block. This will have the impact of relieving, over time, some of the pressure on the High Needs Block. The nature of the expenditure proposed to be transferred is covered by the Regulations, which govern the purposes for which Central Schools Block monies can be used (statutory and regulatory duties for all maintained schools and academies regarding the exclusions of pupils and school attendance) as set out in Appendix 3:

- Youth Offending £47,000
- Behaviour Support £160,000
- ESBD Statutory Functions £192,000
- Travellers Children £389,000

The Authority also proposes that the specific addition of £2,500 into the Central Schools Block related to year 9 admissions is added to the admissions budget, increasing this from £577,600 to £580,100.

The Schools Forum will be asked to make recommendations / take decisions on the Central Schools Block for 2018/19 on 10 January 2018.

Please note that the creation of the Central Schools Block places the financing of these centrally managed functions onto a national formula basis, ceasing the previous Schools Block 'top-slicing' methodology. The only top-slicing that now takes place within the Schools Block is for de-delegated funds (maintained schools only) and for the Growth Fund (both maintained schools and academies).

Maternity / Paternity 'Insurance' Scheme & Suspensions / Public Duties – Nursery Schools and Primary Phase

The Authority recommends that the de-delegated funds for maternity / paternity insurance and suspensions / public duties are continued for nursery and primary in 2018/19, with contributions set at a value to meet anticipated costs. It is currently estimated that the cost of the maternity / paternity insurance scheme will be £43.25 per pupil (increased from £36 in 2017/18). At time of writing this report, there is still a 'critical mass' of 102 maintained primary schools in Bradford plus 7 nursery schools.

FSM Eligibility Assessment

The Local Authority recommends that de-delegation is continued from both the primary and secondary phases for FSM Eligibility Assessment at the 2017/18 per FSM values, with contributions continuing to be taken using FSM Ever 6 data.

Fischer Family Trust (FFT) – Primary Phase

De-delegation was continued for FFT subscription for the primary phase in 2017/18 because of the significant saving that collective purchase delivers. The Authority has asked FFT for its pricing structure for 2018/19 and will present further details for members to inform their decision making. Although the secondary phase ceased de-delegation in 2017/18, all secondary schools and academies, as well as primary academies, were invited to buy into the Authority-led FFT arrangements and many have.

The Authority would anticipate that this approach would be the default option for FFT subscription in 2018/19. Members are asked for their initial feedback on this.

SIFD Provision (academy conversion deficit budgets) – Primary Phase

A de-delegated fund of £100,000 was continued in 2017/18 for maintained primary schools facing exceptional circumstances to access according to criteria agreed with the Schools Forum following consultation with schools. There have been no allocations from this budget to date this year. The Authority expects that a budget for exceptional circumstances will continue to be held for the primary phase in 2018/19. Appendix 2 currently estimates further provision being made in 2018/19 on the same £app basis as in 2017/18.

Members are reminded that primary maintained members in 2017/18 established a new de-delegated fund, of £150,000, available specifically to meet the cost of any deficit balances of primary schools that convert to academy status under sponsored arrangements. There haven't been any deficit conversions and the £150,000 is currently uncommitted. The Authority would anticipate, at the very least, that primary school members would wish to carry over the £150,000 (or the balance of this should any commitments arise this year) so that this is available in 2018/19. Appendix 2 currently estimates further provision being made in 2018/19 on the same £app basis as in 2017/18.

Details of the Item for Consideration (continued)

Trade Unions Facilities Time – All Phases

As reported, a communication from the CEO of BDAT regarding Trade Unions Facilities time was tabled in July 2017. This communication asked for further consideration of the cost of arrangements going forward. The Forum agreed that this be considered within the established review process, which informs the Schools Forum's annual decisions on de-delegation matters. The feedback 'in the system' continues to confirm the value seen in Bradford's collective agreement. It is the cost of Bradford's arrangement compared with the cost in other authorities that has been highlighted and asked to be reviewed.

The benchmarking information presented to the last Forum meeting (Document HZ Appendix 1), which was based on 2017/18 planned budget information, showed how Bradford's spending compares with that in other local authorities (rounded median averages):

- Bradford's spend per pupil £5
- Statistical Neighbour average £4
- Met Districts Average £4
- National Average £2

The review is now being taken forward. To inform this review, critically, the Schools Forum is now asked for a clear view on its expectations about what the cost of future arrangements should be.

The outcomes of the review are likely to begin to be implemented no earlier than the beginning of the 2018/19 academic year. Therefore, as an interim position, it is anticipated that de-delegation within the 2018/19 DSG planned budget will take place at the current values with any reimbursement for maintained schools levied during the year where the cost of arrangements reduces. It is anticipated that academies would be charged for access to arrangements at the reviewed value from the start of the 2018/19 academic year, subject to the agreed timetable for the implementation of the outcomes of the review.

Behaviour Support – Primary Phase De-Delegation

Within the SEND review and consultation, the ESBD School Support Team is proposed to amalgamate into the Authority's single traded support offer for specialist teaching services. As such, subject to the outcomes of the consultation, separate de-delegation for this purpose is anticipated to cease from the beginning of the 2018/19 academic year. Maintained schools will have the choice to buy into these services directly. On this basis, the 2018/19 planned DSG budget would only de-delegate from maintained primary schools for the period April – August 2018.

The Forum is aware, within the High Needs Block consultation for 2018/19, that it is proposed to cease the double funding of the top up element relating to placements in the primary behaviour centres from 1 September 2018. Currently, the High Needs Block funds these placements with the commissioning school retaining its formula funding. From September 2018, it is proposed that the commissioner of the placement, not the High Needs Block, will have responsibility for paying the top up for its formula funding. This is also proposed for the funding of both Bradford Central and District PRUs. However, a critical difference is that there currently isn't a BACs framework in the primary phase to enable collaborative financial management. Following discussions with the centres, the Authority is concerned that requiring the primary centres to establish individual financial agreements with a potentially large number of primary schools, rather than primary schools in clusters, on a 'pay as you place' basis, will create financial instability, certainly in 2018/19 whilst options for collaborative financial management are explored.

Recognising this, the Authority wishes propose that de-delegation from the primary phase for behaviour support continues for the full year, rather than ceasing at 1 September 2018, with the de-delegated budget for the period September 2018 – March 2019 used to help finance the top up for placements. A system for direct charging will still be required to be developed, first and foremost for academies, as de-delegation does not apply. However, this will provide an element of stability in the short term whilst options are explored. It will also be the case that the Schools Block, not the High Needs Block, will fund the top up cost of placements from 1 September 2018. **Primary Maintained School representatives specifically are asked to consider this proposal.**

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

Members are asked to note the information and to consider whether any further information is needed to enable final recommendations and decisions to be taken on 10 January 2018 on the funding of centrally managed and de-delegated Early Years, Schools and Central Schools Block items in 2018/19.

The Forum is asked for feedback specifically on Trade Union Facilities Time and the proposal for the de-delegation from the primary phase for behaviour support.

List of Supporting Appendices / Papers (where applicable)

Appendix 1 – Detailed Summary of Schools, Early Years and Central Schools Block funds.

Appendix 2 – Analysis of Per Pupil Contributions to Schools Block De-delegated Funds.

Appendix 3 – Description of Statutory Duties permitted by the funded by the transferred ESG Centrally Retained Duties grant

Contact Officer (name, telephone number and email address)

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1) De-Delegated Funds Funded from the Schools Block (Maintained Schools) and the Early Years Block (Nursery Schools & Classes Only)

Ref	Fund	DSG Initial Cash Value in 2017/18	Local Authority Recommendation for the 2018/19 Financial Year	Recommended INITIAL Cash Value Retained in 2018/19	Change in Fund Value in 2018/19 (negative = reduction)
1	ESBD School Support (Primary phase only)	£348,527	Continue De-Delegation from the Primary phase on the same basis as 2017/18 (same £app contribution) pending the outcomes of the SEND review and discussion about the behaviour centres. No secondary phase De-Delegation. Value TBC (January meeting)	£309,109	-£39,418
2	School Re-Organisation Costs (actual cost of existing safeguarded salaries)	£49,324	Continue De-Delegation from both primary & secondary phases for existing safeguarded salaries at actual cost.	£49,324	£0
3	School Re-Organisation Costs (school deficit provision; Primary phase only)	£150,000	De-delegate a sum from the Primary phase for provision to support the cost of primary school conversion deficits; calculated on the same £app basis as 2017/18. No secondary phase De-Delegation. Value TBC (January meeting)	£133,033	-£16,967
4	Exceptional Costs & Schools In Financial Difficulty (Primary phase only)	£100,000	Continue De-Delegation from the Primary phase, recovering the same £app as in 2017/18. No secondary phase De-Delegation. Value TBC (January meeting)	£89,000	-£11,000
Page 87	Costs of FSM Eligibility Assessment	£79,938	Continue De-Delegation from both the Primary and Secondary phases on same basis as 2017/18 (same £apFSM contribution). Value TBC (January meeting)	£73,161	-£6,778
	Fischer Family Trust - School Licences (Primary phase only)	£33,560	Continue De-Delegation from the Primary phase, recovering the cash value needed to match actual cost (TBC). No secondary phase De-Delegation. The secondary phase and all academies invited to subscribe individually through the Local Authority. Value TBC (January meeting)	£21,000	-£12,560
	Trade Union Facilities Time	£229,359	Continue De-Delegation from Early Years (nursery schools), Primary & Secondary phases on same basis as 2017/18 (same £app contribution) pending the outcomes of review of cost. To be discussed further by the Schools Forum. Value TBC (January meeting)	£211,522	-£17,837
	Trade Union Health & Safety Rep Time	£35,048	Continue De-Delegation from Early Years (nursery schools), Primary & Secondary phases on same basis as 2017/18 (same £app contribution) pending the outcomes of review of cost. To be discussed further by the Schools Forum. Value TBC (January meeting)	£32,322	-£2,726
9	School Maternity / Paternity 'insurance' fund	£1,838,489	Continue De-Delegation from Early Years (nursery schools) and primary phases at a value forecasted to afford the scheme in 2018/19. No secondary phase De-Delegation. Value TBC (January meeting)	£1,637,161	-£201,328
10	School Staff Public Duties & Suspensions Fund	£40,040	Continue De-Delegation from the Primary phase and Early Years (Nursery schools), recovering the same £app as in 2017/18. No secondary phase De-Delegation. Value TBC (January meeting)	£36,000	-£4,040
Total De-Delegated Funds		£2,904,285		£2,591,631	-£312,654
Value within Schools Block (Primary & Secondary)		£2,748,669		£2,399,052	-£538,585

Value within Early Years Block	£155,615
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£192,579	-£1,059,333
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2) Central Schools Block (Maintained Schools and Academies)

Ref	Fund	DSG Initial Cash Value in 2017/18	Local Authority Recommendation for the 2018/19 Financial Year	Recommended INITIAL Cash Value Retained in 2018/19	Change in Fund Value in 2018/19 (negative = reduction)
11	Schools Forum Running Costs	£10,000	Continue at current level (Please note that prior year spending restriction has now been released).	£10,000	£0
12	School Admissions	£577,600	Continue at current level plus £2,500 to pass on the DfE's specific addition for new Yr 9 admissions responsibility (Please note that prior year spending restriction has now been released).	£580,100	£2,500
13	Total DSG Matched Contribution to School Improvement	£458,305	This budget has now ceased. It was a historic commitment that will be funded by the DfE in 2018/19 only. Recommended that the 'one off benefit' of this is retained within the Central Schools Block to enable the transfer of currently High Needs Block funded activities.	£0	-£458,305
14	DfE Copyright Licences (national framework for all state funded schools)	£414,436	Continue to charge to the Central Schools Block at actual cost (TBC by DfE). Early Years and High Needs elements are charged to their respective Blocks. Value TBC (January meeting)	£455,880	£41,444
Page 88 15	Local Authority Centrally Retained Duties all schools & academies previously funded by the High Needs Block	£0	As set out in Document HZ (October meeting) and Document IG, recommended to be allocated to enable the transfer, incrementally over time of the youth offending, behaviour support, ESBD services and travellers children statutory services from the High Needs to the Central Schools Block. Value TBC (January meeting)	£476,770	£476,770
16	Former ESG Centrally Retained Duties (transferred allocation into the Schools Block for the Council's statutory responsibilities relating to all state funded schools and academies). Please see Document IG Appendix 3.	£1,331,086	To fully passport the value of this transferred Grant back to the Authority at the same cash value as 2017/18.	£1,331,086	£0
Total		£2,791,427		£2,853,836	£62,410

3) Schools Block - Growth Fund

Ref	Fund	DSG Initial Cash Value in 2017/18	Local Authority Recommendation for the 2018/19 Financial Year	Recommended INITIAL Cash Value Retained in 2018/19	Change in Fund Value in 2018/19 (negative = reduction)
17	Ringfenced Growth Fund (excluding costs supported by one off monies)	£1,789,776	Continue at a value to meet forecasted cost and to protect 19/20 funding (where the DfE will now fund in 2019/20 on the basis of 2018/19 planned budgets). Value TBC (January meeting) . The 2018/19 fund includes £0.36m (primary) and £0.70m (secondary) budgets for new expansions at 1 September 2018. A list of known (existing expansion) allocations will be presented in January for the Schools Forum's approval.	£1,790,161	£385
Total		£1,789,776		£1,790,161	£385

4) Centrally Managed Funds in the Early Years Block

Ref	Fund	DSG Initial Cash Value in 2017/18	Local Authority Recommendation for the 2018/19 Financial Year	Recommended INITIAL Cash Value Retained in 2018/19	Change in Fund Value in 2018/19 (negative = reduction)
18	EYSFF 3 and 4 Year Olds Contingency	£200,000	Cease a specific contingency with any differential in cost being covered by either one off monies or the 2019/20 Early Years Block (under the now established principle of Block ring-fencing).	£0	-£200,000
19	De-Delegated funds charged to the Early Years Block	£155,615	As per section 1 above. Value TBC (January meeting).	£192,579	£36,964
20	DfE Copyright Licences (national framework for all state funded schools) - EYB element	£39,946	As per item 14 above. Value TBC (January meeting).	£43,940	£3,995
21	EYSFF - Early Years SEND Inclusion (EYIP)	£600,000	The DfE now requires all authorities to have a fund specifically allocated to support high incidence lower need SEND in early years settings. Our EYIP fund, which allocates sums to settings for SEND support, is currently being reviewed in the context of the wider SEND Strategic Review.	£800,000	£200,000
22	EYSFF Pupil Premium and Disability Access Fund Grants allocated through the DSG	£502,008	Stated here purely for reference. These funds will be 100% delegated. Sums will be paid out to providers for the Early Years Pupil Premium (£0.491m) and the new DAF (£0.179m) during the year, with the fund held centrally at the start of the year.	£670,915	£168,907
Total		£1,497,569		£1,707,434	£209,865

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	2017/18 DSG Budget (Excluding One Off)	Total Indicative Proposed value 2018/19	Early Years Total Value	Primary Total Value	Secondary Total Value	2018/19 Value £PP			2017/18 Value £PP			Difference £pp		
						Maintained Early Years £ Per Pupil	Maintained Primary £ Per Pupil	Maintained Secondary £ Per Pupil	Maintained Early Years £ Per Pupil	Maintained Primary £ Per Pupil	Maintained Secondary £ Per Pupil	Maintained Early Years £ Per Pupil	Maintained Primary £ Per Pupil	Maintained Secondary £ Per Pupil
ESBD School Support	348,527	309,109		309,109			£9.10			£9.10			£0.00	
Costs of FSM Eligibility Assessment	79,938	73,161		58,517	14,643									
Fischer Family Trust - School Licences	33,560	21,000		21,000			£0.62			£0.88			-£0.26	£0.00
School Maternity / Paternity 'insurance' fund	1,838,489	1,637,161	168,397	1,468,764		£43.25	£43.25		£36.57	£36.57	£36.57	£6.68	£6.68	-£36.57
Trade Union Facilities Time	229,359	211,522	17,765	154,946	38,811	£4.56	£4.56	£4.56	£4.56	£4.56	£4.56	£0.00	£0.00	£0.00
Trade Union Health & Safety Rep Time	35,048	32,322	2,715	23,677	5,931	£0.70	£0.70	£0.70	£0.70	£0.70	£0.70	£0.00	£0.00	£0.00
School Staff Public Duties & Suspensions Fund	40,040	36,000	3,703	32,297		£0.95	£0.95		£0.94	£0.96		£0.01	-£0.01	£0.00
Exceptional Costs & Schools In Financial Difficulty	100,000	89,000		89,000			£2.62			£2.61			£0.01	£0.00
School Re-Organisation Costs (Safeguards)	49,324	49,324		46,253	3,071		£1.36	£0.36		£1.21	£0.37		£0.15	-£0.01
School Re-Organisation Costs (Deficits)	150,000	133,033		133,033			£3.92			£3.92			£0.00	£0.00
TOTAL Value Of De-Delegated Funds / £APP	2,904,285	2,591,631	192,579	2,336,596	62,456	£49.46	£67.08	£5.62	£42.77	£60.50	£42.20	£6.69	£6.58	-£36.58

Please note that the initial cash value of de-delegated funds in 2018/19 is subject to confirmation (taking account of 1 January 2018 academy conversion). Confirmed information will be presented to the 10 January meeting.

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Local Authority Statutory Duties (Central Schools Block / Ex-ESG Funding)

Statutory and regulatory duties

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> • Director of children's services and personal staff for director (Sch 2, 15a) • Planning for the education service as a whole (Sch 2, 15b) • Revenue budget preparation, preparation of information on income and expenditure relating to education, and external audit relating to education (Sch 2, 22) • Authorisation and monitoring of expenditure not met from schools' budget shares (Sch 2, 15c) • Formulation and review of local authority schools funding formula (Sch 2, 15d) • Internal audit and other tasks related to the authority's chief finance officer's responsibilities under Section 151 of LGA 1972 except duties specifically related to maintained schools (Sch 2, 15e) • Consultation costs relating to non-staffing issues (Sch 2, 19) • Plans involving collaboration with other LA services or public or voluntary bodies (Sch 2, 15f) • Standing Advisory Committees for Religious Education (SACREs) (Sch 2, 17) • Provision of information to or at the request of the Crown other than relating specifically to maintained schools (Sch 2, 21) 	<ul style="list-style-type: none"> • Functions of LA related to best value and provision of advice to governing bodies in procuring goods and services (Sch 2, 56) • Budgeting and accounting functions relating to maintained schools (Sch 2, 73) • Functions relating to the financing of maintained schools (Sch 2, 58) • Authorisation and monitoring of expenditure in respect of schools which do not have delegated budgets, and related financial administration (Sch 2, 57) • Monitoring of compliance with requirements in relation to the scheme for financing schools and the provision of community facilities by governing bodies (Sch 2, 58) • Internal audit and other tasks related to the authority's chief finance officer's responsibilities under Section 151 of LGA 1972 for maintained schools (Sch 2, 59) • Functions made under Section 44 of the 2002 Act (Consistent Financial Reporting) (Sch 2, 60) • Investigations of employees or potential employees, with or without remuneration to work at or for schools under the direct management of the headteacher or governing body (Sch 2, 61)

Responsibilities held for all schools	Responsibilities held for maintained schools only
	<ul style="list-style-type: none"> • Functions related to local government pensions and administration of teachers' pensions in relation to staff working at maintained schools under the direct management of the headteacher or governing body (Sch 2, 62) • Retrospective membership of pension schemes where it would not be appropriate to expect a school to meet the cost (Sch 2, 75) • HR duties, including: advice to schools on the management of staff, pay alterations, conditions of service and composition or organisation of staff (Sch 2, 63); determination of conditions of service for non-teaching staff (Sch 2, 64); appointment or dismissal of employee functions (Sch 2, 65) • Consultation costs relating to staffing (Sch 2, 66) • Compliance with duties under Health and Safety at Work Act (Sch 2, 67) • Provision of information to or at the request of the Crown relating to schools (Sch 2, 68) • School companies (Sch 2, 69) • Functions under the Equality Act 2010 (Sch 2, 70) • Establish and maintaining computer systems, including data storage (Sch 2, 71) • Appointment of governors and payment of governor expenses (Sch 2, 72)

Education welfare

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> Functions in relation to the exclusion of pupils from schools, excluding any provision of education to excluded pupils (Sch 2, 20) School attendance (Sch 2, 16) Responsibilities regarding the employment of children (Sch 2, 18) 	<ul style="list-style-type: none"> Inspection of attendance registers (Sch 2, 78)

Asset management

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> Management of the LA's capital programme including preparation and review of an asset management plan, and negotiation and management of private finance transactions (Sch 2, 14a) General landlord duties for all buildings owned by the local authority, including those leased to academies (Sch 2, 14b) 	<ul style="list-style-type: none"> General landlord duties for all maintained schools (Sch 2, 76a & b (section 542(2)) Education Act 1996; School Premises Regulations 2012) to ensure that school buildings have: <ul style="list-style-type: none"> appropriate facilities for pupils and staff (including medical and accommodation) the ability to sustain appropriate loads reasonable weather resistance safe escape routes appropriate acoustic levels lighting, heating and ventilation which meets the required standards adequate water supplies and drainage playing fields of the appropriate standards

Responsibilities held for all schools	Responsibilities held for maintained schools only
	<ul style="list-style-type: none"> • General health and safety duty as an employer for employees and others who may be affected (Health and Safety at Work etc. Act 1974) • Management of the risk from asbestos in community school buildings (Control of Asbestos Regulations 2012)

Central support services

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> • No functions 	<ul style="list-style-type: none"> • Clothing grants (Sch 2, 52) • Provision of tuition in music, or on other music-related activities (Sch 2, 53) • Visual, creative and performing arts (Sch 2, 54) • Outdoor education centres (but not centres mainly for the provision of organised games, swimming or athletics) (Sch 2, 55)

Premature retirement and redundancy

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> • No functions 	<ul style="list-style-type: none"> • Dismissal or premature retirement when costs cannot be charged to maintained schools (Sch 2, 77)

Monitoring national curriculum assessment

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> • No functions 	<ul style="list-style-type: none"> • Monitoring of National Curriculum assessments (Sch 2, 74)

Therapies

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> No functions 	<ul style="list-style-type: none"> This is now covered in the high needs section of the regulations and does not require schools forum approval

Other on-going duties

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> Licences negotiated centrally by the Secretary of State for all publicly funded schools (Sch 2, 8); this does not require schools forum approval Admissions (Sch 2, 9) Places in independent schools for non-SEN pupils (Sch 2, 10) Remission of boarding fees at maintained schools and academies (Sch 2, 11) Servicing of schools forums (Sch 2, 12) Back-pay for equal pay claims (Sch 2, 13) Writing to parents of year 9 pupils about schools with an atypical age of admission, such as UTCs and studio schools, within a reasonable travelling distance (new addition to CSSB, to be included in 2018 to 2019 regulations)¹ 	<ul style="list-style-type: none"> No functions

¹Funding for this duty was previously delivered to local authorities via a s.31 grant. Additional funding will be added to the CSSB baseline for this from 2018-19.

Historic commitments

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none">• Capital expenditure funded from revenue (Sch 2, 1)• Prudential borrowing costs (Sch 2, 2(a))• Termination of employment costs (Sch 2, 2(b))• Contribution to combined budgets (Sch 2, 2(c))	<ul style="list-style-type: none">• No functions