

Schools Forum

Wednesday, 17 October 2018 at 8.00 am

**VENUE: Ernest Saville Room - Second, Floor, 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 19 SEPTEMBER 2018 & MATTERS ARISING**

1 - 12

Recommended –

That the minutes of the meeting held on 19 September 2018 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. Proposed allocations to the secondary phase will be presented at the next meeting. This is because October 2018 Census data unfortunately is not yet currently available. The Authority will contact likely eligible secondary schools and academies to give them sight of an indicative allocation as soon as Census data has been collected / released by the DfE (in the case of academies).

6. STRATEGIC SEMH & SEND REVIEWS (i)

A progress update will be provided on the Authority's strategic reviews of SEND and Alternative Provision.

Recommended –

Members are asked to consider and to note the update.

(Lynn Donohue – 01274 439606)

7. FURTHER DISCUSSION ON FALLING ROLLS FUND / UNDER-SUBSCRIPTION (a) 13 - 20

A report will be presented, **Document JI**, which follows from the Forum's discussion at the last meeting (Document JE) and which asks Members to further consider the options for supporting schools that are under-subscribed and / or have falling rolls.

Recommended –

The Schools Forum is asked consider the report and to decide whether schools should now be consulted on this matter within the 2019/20 primary and secondary Schools Block formula consultation.

(Andrew Redding – 01274 432678)



8. **CONSULTATION ON THE PRIMARY AND SECONDARY SCHOOL FORMULAE & SCHOOLS BLOCK MATTERS 2019/20 (a)** 21 - 66

The Business Advisor (schools) will present a report, **Document JK**, which asks the Forum to consider the consultation document, which outlines the proposals for the Schools Block, the formulae to be used to calculate budgets for Primary and Secondary schools and academies for the 2019/20 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.

Recommended –

The Schools Forum is asked to agree that the consultation (Document JK Appendix 1) is published.

(Andrew Redding – 01274 432678)

9. **CONSULTATION ON EARLY YEARS BLOCK FUNDING MATTERS 2019/20 (a)** 67 - 110

The Business Advisor (Schools) will present a report, **Document JL**, which provides 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 Block and Single Funding Formula for the 2019/20 financial year.

Recommended –

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

(Andrew Redding – 01274 432678)

10. **CONSULTATION ON HIGH NEEDS BLOCK FUNDING MATTERS 2019/20 (a)** 111 - 138

The Business Advisor (Schools) will present a report, **Document JM**, which asks Members to agree the publication of the proposed consultation document on the High Needs Block funding model for 2019/20. This includes sight of the estimated number of places the Authority expects to commission.

Recommended –

The Forum is asked to agree to the publication of the proposed consultation on the High Needs Block funding model for 2019/20.

(Andrew Redding – 01274 432678)



11. **DSG CENTRAL ITEMS AND DE-DELEGATED FUNDS 2019/20 (a)** 139 -
146

The Business Advisor (Schools) will present a report, Document JN, which asks the Forum to review the position of Central Schools Block, Schools Block and Early Years Block central funds and de-delegated items in 2019/20.

Recommended –

The Forum is asked to review the position of Central Schools Block, Schools Block and Early Years Block central funds and de-delegated items, to indicate what further consideration should be given / review work should take place, in advance of making final recommendations for 2019/20 at the January 2019 meeting.

Members representing Maintained Primary Schools are asked to decide on de-delegation in 2019/20 for the purposes of purchasing subscriptions to Fischer Family Trust.

(Andrew Redding – 01274 432678)

12. **AMENDMENTS TO THE SCHEME FOR FINANCING SCHOOLS AND LINKED DOCUMENTS (FINANCIAL REGULATIONS FOR MAINTAINED SCHOOLS AND SCHOOL CONTRACT STANDING ORDERS) (a)** 147 -
196

The Business Advisor (Schools) will present a report, **Document JO**, which asks the Forum to consider the outcomes of consultation that has been completed on the amendment to the Council's Financial Regulations for Maintained Schools and School Contract Standing Orders, and the subsequent amendments to the Scheme for Financing Schools. This consultation was presented to the Schools Forum on 11 July.

Recommended –

The Schools Forum is asked to agree the proposed amendments to the Scheme for Financing Schools and to recommend to the Authority's Governance and Audit Committee that the amendments to the Scheme, the Financial Regulations for Maintained Schools and School Contract Standing Orders are implemented.

(Andrew Redding – 01274 432678)



13. SCHOOLS FORUM STANDING ITEMS (i)

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

Update from the Schools Financial Performance Group (SFPG)

Update from High Needs Block Steering Group (HNBSG)

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)

14. EXCLUSION OF THE PUBLIC

The Schools Forum will be asked to consider if the agenda item relating to PFI / Building Schools for the Future (BSF) contractual matters should be considered in the absence of the public and, if so, to approve the following recommendation:

Recommended –

That the public be excluded from the meeting during the discussion of the following item (item *15) on the grounds that it is likely, in view of the nature of the business to be transacted or the nature of the proceedings, that if they were present exempt information within Paragraph 3 (Financial or Business Affairs) of Schedule 12A of the Local Government Act 1972 (as amended) would be disclosed and it is considered that, in all the circumstances, the public interest in allowing the public to remain is outweighed by the public interest in excluding public access to the relevant part of the proceedings for the following reason: commercial confidentiality."

(Andrew Redding – 01274 432678)

15. PFI / BSF CONTRACTUAL MATTERS (i)

The Schools Forum will be asked to consider the information presented. This agenda item follows from the information presented to the last meeting on 19 September.



**Note: The Schools Forum will have previously considered excluding the public from consideration of this matter under item 14 above.*

(Andrew Redding – 01274 432678)

16. ANY OTHER BUSINESS (AOB) / FUTURE AGENDA ITEMS

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

17. DATE OF NEXT MEETING

Please see the published schedule of meetings – the next Forum meeting is scheduled for Wednesday 5 December 2018.

(a) Denotes an item for action

(i) Denotes an item for information





MINUTES OF THE MEETING OF THE SCHOOLS FORUM HELD ON WEDNESDAY 19 SEPTEMBER 2018 AT CITY HALL, BRADFORD

Commenced 0805
Concluded 1100

PRESENT

SCHOOL & ACADEMIES MEMBERS

Ashley Reed, Brent Fitzpatrick, Carol Dewhurst, Deborah Howarth, Dianne Richardson, Dominic Wall, Graham Swinbourne, Helen Williams, Ian Morrel, Kevin Holland, Maureen Cairns, Nicky Kilvington, Nigel Cooper, Sian Young, Sue Haithwaite, Trevor Left and Wahid Zaman

NON SCHOOL MEMBER

Vivienne Robinson

NOMINATE SUBSTITUTE

Irene Docherty

LOCAL AUTHORITY (LA) OFFICERS

| | |
|-----------------|---|
| Andrew Redding | Business Advisor (Schools) |
| Asad Shah | Committee Services Officer |
| Dawn Haigh | Principal Finance Officer (Schools) |
| Lynn Donohue | Early Years Strategic Manager |
| Marium Haque | Deputy Director, Education and Learning |
| Michael Jameson | Strategic Director, Children's Services |
| Raj Singh | Business Adviser (Financial Services) |
| Susan Krupinski | Principal Finance Officer - Schools |
| Yasmin Umarji | Strategic Relationship Manager |

APOLOGIES

MEMBERS – Alison Kaye, Anthony Smith, Bryan Harrison, Donna Willoughby, Emma Hamer, Gill Holland, Ray Tate, Tahir Jamil and Tehmina Hashmi. OFFICERS – Michael Jameson, Strategic Director, Children's Services

DIANNE RICHARDSON IN THE CHAIR

The Chair began the meeting by welcoming new Forum Members, Carol Dewhurst and Sian Young. The Chair also welcomed Marium Haque.

330. DISCLOSURES OF INTERESTS

Declarations were received from Dominic Wall, Sue Haithwaite, Ian Morrel and Trevor Loft for agenda item 6 "SEND and SEMH Reviews", (minute 334).

Further declarations were received from Nicky Kilvington and Nigel Cooper for agenda item 9 “Discussion on Under-Subscription and Strategic School Organisation”, (minute 337).

331. MINUTES OF 11 JULY 2018 & MATTERS ARISING

a) To agree the minutes of 11 July 2018 as a correct record.

b) The Business Adviser (Schools) reported on progress made on “Action” items:

- **Item 317 page 99 BSF / PFI:** The Authority has contacted affected schools and academies and there is a confidential item presented to this meeting.
- **Item 319 page 100 Under-subscription and place-planning:** A report is presented to this meeting.
- **Item 320 page 101 SEND & SEMH Reviews:** An update, together with the draft SEND strategy is presented to this meeting. The Local Authority has written to Lord Agnew regarding capital funding for SEND places expansion. A letter from the Schools Forum will be drafted and it is planned for this to incorporate the DfE’s initial response to the Authority’s letter.
- **Item 321 page 101 Schools Forum Membership:** The Business Advisor (Schools) confirmed that Dianne Richardson has been nominated as Chair of the Schools Forum for 2018-19 and Ian Morrel has been nominated as Vice Chair. Dianne and Ian were the only nominations for their respective roles. The Business Advisor also confirmed that the DfE’s announcements over summer regarding National Funding Formula (NFF) do not alter the Forum’s composition or role for 2019/20. The DfE has published this week an update of its Schools Forum good practice guidance, which has been quickly reviewed but will be considered in more detail.
- **Item 323 page 103 NFF and DSG:** Updates on both NFF and DSG are presented to this meeting. The 3 FFWG meetings are still scheduled and Forum Members are encouraged to book on one of these.
- **Item 324 page 103 Scheme / CSOs Revision Consultation:** The consultation document was published and the response period has been extended as requested to 12 October. A reminder was placed on Bradford Schools Online at the beginning of term. The outcomes of the consultation will be presented to the Schools Forum on 17 October.

Other Matters Arising

- **DSG Brought Forward Balance final confirmation 2017/18:** The Business Advisor (Schools) presented the single page document included within the agenda reports pack, which confirms for Members the final DSG brought forward balance from the 2017/18 financial year. This is £11.363m, which is 2% of the overall DSG. The only difference from the figures presented now from those presented to the



Forum in May is the brought forward balance in the Early Years Block, which has been updated for the DfE's final allocation confirmed in July. The report separates the £11.363m into blocks and the Business Advisor reminded Members of the extent to which these balances are already mostly committed:

- In the Schools Block: in particular to de-delegated fund balances, the financial support model for Beckfoot Upper Heaton and for growth fund and deficit budget provisions.
 - In the High Needs Block: to support transition and managing growing financial pressure.
 - In the Early Years Block: to enable us to hold base rate funding within the EYSFF for 3&4 year olds at a level higher than the DfE's EYB funding would otherwise permit.
- **Teacher's Pay Award and Pay Grant:** The Business Advisor (Schools) reported there was an announcement at the end of last week regarding confirmation of the September 2018 pay award for teachers, as well as further details of the DfE's additional Teacher's Pay Grant, which will be allocated to schools and academies via formula towards the end of this term. The Pay Grant is being calculated on nationally set values per pupil multiplied by pupil numbers. It is intended to meet the costs of the pay award above a 1% increase that schools are expected to have budgeted for.

Member asked some questions, including whether the Grant would cover on-costs and whether this will remain in place after 2019/20. The Business Advisor stated that the national rates are calculated on the total national pay bill, which will include on-costs, but that the status of the Grant after 2019/20 has not been announced. There are a number of quite crucial school funding matters that it appears will not now be decided until the autumn 2019 Spending Review.

The Member representing the Teacher Trades Unions asked for confirmation that the implementation of the pay award by the Local Authority will not be delayed. The Business Advisor said that he will feed this back to Corporate HR.

- **Employer's Contribution to Teacher Pensions:** The Business Advisor (Schools) reminded Members that an expected increase in 2019/20 in the employer's contribution to teacher pensions has been considered by the Forum in previous reports. Further information has now begun to be released. Although we do not yet have a basis on which to confirm details, these announcements suggest that the employer's contribution rate will increase in 2019/20 but that additional funding will be provided by the DfE to offset unexpected costs. What this is, how it will work and whether it will continue after 2019/20, are not yet clear.

The Member representing the Teacher Trades Unions reported that a colleague on the TPS Board has indicated a possible 3% increase and that the understanding is that the Treasury has committed to meet the full cost of increase. It was agreed that this is a matter that the Schools Forum would like to receive regular updates on.

- **School Resources Planning Documents and Tools:** The Business Advisor (Schools) reported, for Members' awareness, that the DfE towards the end of



summer published quite a bit of new / updated guidance and tools for schools and academies to use to guide their budget and resources management. These include details of new national procurement deals as well as an updated arithmetic scorecard and a new assessment tool and data dashboard. All these are signposted by us on BSO. Members are encouraged, in their discussions with colleagues, to spread awareness of these tools and guidance.

Resolved –

- (1) That progress made on “Matters Arising” be noted.**
- (2) That the minutes of the meeting held on 11 July 2018 be signed as a correct record.**

ACTION: *City Solicitor*
Business Adviser (Schools)

332. MATTERS RAISED BY SCHOOLS

The Business Advisor (Schools) reported that an approach has been made by Silsden Primary School requesting that an additional year of lump sum support is provided to support the school’s amalgamation from 2 separate schools on 2 sites to 1 school on 1 site at September 2020. This request is set out in a separate single side document within the agenda papers.

The Schools Forum is recommended to approve the Authority’s approach to the ESFA for a ‘disapplication’ to enable this lump sum support to be provided. The specific additional support provided would be £44,000 in 2019/20 only.

Resolved – That a submission to the ESFA for a ‘disapplication’ related to the lump sum allocation to Silsden Primary School in 2019/20 be approved.

Action: *Business Adviser (Schools)*

333. STANDING ITEM – DSG GROWTH FUND ALLOCATIONS

No resolution was passed on this item.

The Business Advisor (Schools) stated that he expected to present proposed allocations to the secondary phase to the 17 October meeting, subject to the October Census information being available. If the Census data is not available in time, these allocations will be presented to the Schools Forum meeting on 5 December and schools / academies will be notified of provision allocations as soon as possible to aid their budget planning.

334. STRATEGIC SEMH & SEND REVIEWS

A progress update was provided on the Authority's strategic reviews of SEND and Alternative Provision, **Document JB**. This report included an update on matters presented to the Schools Forum on 11 July as well as the Authority's consultation on the District's SEND Strategy.

The presentation of this item was led by the Authority's SEND and Behaviour Strategic Manager, who focused on the Authority's proposed SEND strategy as well as an update on the status of the development of the new SEMH Free School. She also reported that the Authority has submitted a response to the DfE's "pre-registration" request at the beginning of September to register that we wish to develop new free school provision for generic provision, ASD specialism and alternative provision.

In the discussion that followed the presentation of the report, Forum Members asked the following questions and made the following comments:

- Whether wave 13 of free schools has now been replaced or has ceased? The SEND and Behaviour Strategic Manager responded that wave 13 is now purely about mainstream provision. Schools and academies in the District are registering their interest in developing mainstream provision and the DfE has written to the Authority to seek our views on these applications.
- Whether in submitting this "pre-registration" for new special schools the Authority quoted any figures on the number of places to be delivered. The SEND Manager stated that no figures were provided at this stage; our response was purposely left non-specific to enable continued discussion with the DfE.
- The DfE may have "moved the goal-posts" with regard to the SEND / AP free school programme, but Bradford's landscape has not altered and work has taken place over the last 2 years on the development of new provision. Why has this landscape and development work not been explicitly written into the SEND Strategy? We should now be much more direct about what we need and our strategy for delivering this irrespective of whether / how the DfE's "goal-posts" are moved.

The Deputy Director, Education and Learning, having been in post for 3 days, responded to explain that an SEND strategy is wider than education and that we must work to tie the whole system together. She stated that, in her view, an opening date of September 2020 for the new SEMH Free School is unrealistic, as is a reliance on the DfE's free school programme to deliver a sufficient number of SEND / AP places. Our "Plan B" is actually "Plan A". We must plan on the basis that we are unlikely to get free school provision from the DfE's programme. We need to pull this plan together quickly.

- Whether the figures regarding the development of places quoted in the SEND strategy document are 'additional places' (in that these have adjusted our proportion of children with EHCPs in mainstream and specialist provision) or whether they have simply met the growth in demand for places that has come from



demographic pressure. The SEND Manager advised that a response to this question will be provided to the next meeting.

- Where has the High Needs Block funding released as a result of the transformation of teaching support services been allocated? The SEND Manager advised that a response to this question will be provided to the next meeting.
- Referring to discussions in previous Forum meetings, that Bradford is a “litmus test” for what is going on nationally around the growth in High Needs Block financial pressure and the growth in need for specialist provision capacity. The Forum has previously stated to mainstream schools (on the back of the 2017/18 Schools Block transfer) that additional specialist places will be provided, to the benefit of mainstream, but it now appears that the additional places that have been created have only kept up with demographic growth. The problem of delivering additional capacity is currently growing at a rate faster than our delivery solutions. This is indicated by the 2 main areas of spend growth being mainstream EHCPs and out of authority / independent placements. We now need some bold decisions / solutions, which include looking at how we use our existing school stock.
- It is important that we do also recognise the developments that have been made, which includes the creation of additional places. The Business Advisor (Schools) responded to reminded Members that, following our High Needs Block finance strategy, an additional 389 specialist places will be funded at April 2019.
- What combined pressure is being applied on Government in relation to High Needs funding and capacity sufficiency? The Deputy Director reported that a letter is being sent from the Association of Children’s Services Directors on the wide ranging issues created by the SEND Code of Practice, new burdens and finance. A Member also advised that NASEN is lobbying on issues related to places capacity.

In summing up the discussion, the Chair asked that the Authority considers the comments made by Members on the SEND strategy and also provides responses to the next meeting to the questions not answered. The Chair emphasised the urgency of developing a “Plan A” for places creation. She also asked that the Authority looks at the options, within in the Opportunity Area Programme, to provide training to improve universal provision in schools.

Resolved –

- (1) That the information in Document JB be noted.**
- (2) That responses are presented to the next Schools Forum meeting to the questions that were asked, and comments made, by Members on the SEND Strategy that are recorded in the minutes.**

Action: SEND and Behaviour Strategic Manager



335. NATIONAL FUNDING FORMULA – UPDATE

The Business Advisor (Schools) presented a report, **Document JC**, which provided a briefing on the implementation of the National Funding Formula. This report followed from the information presented to the Schools Forum on 11 July.

The Business Advisor explained that the briefing given in Document JC sets the scene for the decisions that will need to be taken in the management of the DSG for the 2019/20 financial year. He emphasised that Authority, with the Schools Forum, will continue to have management responsibility of Schools Block funding formula in 2020/21. He also explained that further sight of funding arrangements post 2019/20 is unlikely to be achieved until autumn 2019, depending on the timing of announcements from the Spending Review. There are a number of quite crucial matters that will be uncertain until this, including the continuation of funding protection for maintained nursery schools and movement towards the NFF end product in the Schools and the High Needs Blocks.

The Business Advisor emphasised again for Members how the current damping in the High Needs Block settlement means that we do not receive £12.4m of high needs funding that the NFF should allocate to us. Referring to the next agenda item, he introduced the proposal in outline for a 0.5% transfer to be enacted from the Schools Block to the High Needs Block in 2019/20. He explained that this will be a key point for discussion in the scheduled FFWG sessions. In response to a Member's question, the Business Advisor stated that it is a reasonable assumption that the £12.4m of 'owed' high needs funding will not be released in the short or medium terms and that the Authority has to plan its DSG management on this basis. The Vice Chair emphasised that the impact of any decision to move Schools Block monies to the High Needs Block in 2019/20, especially where we continue to rely on mainstream settings in supporting children and young people with SEND, must be analysed.

The Business Advisor also emphasised again how reliant primary and secondary schools and academies in Bradford are on the Minimum Funding Guarantee, and that the level at which this is set in 2019/20 is a key decision. He explained that, at a simple level, the difference in the level of MFG set with a Schools Block transfer to the High Needs Block of 0.5% and the level of MFG set without this is about 0.5%; the difference between a 0.5% and a 0% MFG.

Resolved –

That the information in Document JC be noted.

336. OUTLINE - FORMULA FUNDING ARRANGEMENTS & CONSULTATIONS 2019/20

The Business Advisor (Schools) presented a report, **Document JD**, which outlined the working principles that are being considered in the development of Bradford's formula funding arrangements for 2019/20.

He explained that the Authority will present formal consultation reports, for the Schools Block, Early Years Block and High Needs Block, to the Schools Forum at the next meeting, with these consultations being published immediately after.

Forum Members are invited to attend a 'Formula Funding Working Group' session, on Monday 1 October (8am) or Tuesday 2 October (8am) or Thursday 4 October (8am). These sessions will enable Forum Members to consider in more detail the impact of formula funding decisions and to explore and guide the proposals for 2019/20 that would be set out for consultation in October.

The Business Advisor also referred to the currently live reviews of special school funding and Early Years SEND inclusion funding.

Resolved –

(1) That the information in Document JD be noted.

(2) Members are encouraged to attend a 'Formula Funding Working Group' session to discuss the matters raised in Document JD in more detail before more formal consultation documentation, which will set out proposals for 2019/20 formula funding arrangements, is presented to the Forum at the next meeting.

Action: Business Advisor (Schools)

337. DISCUSSION ON UNDER-SUBSCRIPTION & STRATEGIC SCHOOL ORGANISATION

The Business Advisor (Schools) presented a report, **Document JE**, which asked the Schools Forum to more closely consider the Authority's school organisation strategy and the impact that falling rolls (under-subscription) is having on some schools in the District and the options that may be available to support these schools. The Business Advisor asked Forum Members for an initial steer on whether the options for supporting schools and / or academies from the DSG should be considered in more detailed. If the Forum requests this then a follow up report will be presented to the next meeting.

Summarising the Forum's initial discussion on this matter, Members agreed that the options for financial support, through a Falling Rolls Fund and / or through the use of funding for exceptional circumstances de-delegated from maintained schools, should be considered in more detail.

- There is a level of 'moral responsibility' to ensure that schools facing exceptional circumstances receive appropriate support to maintain standards.
- The Deputy Director stated that a Falling Rolls Fund operated in her previous authority and this this added value.



Forum Members however, recognised that there may be potential difficulties with such support mechanisms, including how criteria could identify exceptional circumstances without removing the expectation that schools will take appropriate budget action, the cost to schools of the additional 'top-slice' that would be required, and the application of the restrictions that are placed by the DSG Regulations. For example, financial support can only be provided to schools and academies from a Falling Rolls Fund where these are judged Good or Outstanding by Ofsted. De-delegated funding only applies to maintained schools.

The longevity of mechanisms (under NFF transition) must be considered.

The 'fairness' of an approach needs to be tested. It was recognised by Members that such mechanisms would not provide support in all cases, including to academies that may admit a significant number of pupils (a bulge) after the Census is taken.

Forum Members formed an initial view that financial support should only be temporary / transitional, that the potential cost going forward (and the number of schools and / or academies going forward that would potentially be eligible) should be modelled, and that options should be considered to enable support to be provided on an 'individual cost basis' rather than a blanket formula. The Forum also indicated that it may wish to look at the extent to which any mechanism would only be applied to a specific phase (primary or secondary).

Resolved –

- (1) That the establishment of a new mechanism (a Falling Roll Fund and / or expanded de-delegated support fund arrangements) within the DSG Schools Block, which would be available to support schools in managing the impact of falling rolls and / or under-subscription, be supported in principle and be further explored.**
- (2) That a more detailed options report, with an impact analysis, be presented to the next meeting.**

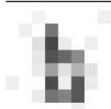
Action: *Business Advisor (Schools)*

338. WORK PROGRAMME AND SCHEDULE OF MEETINGS 2018/19 ACADEMIC YEAR

The Business Advisor (Schools) presented a report, **Document JF**, which outlined the School Forum's 2018/19 Academic Year work programme.

Forum Members did not comment on this item and did not ask any questions.

Resolved – That the proposed programme, Document JE, be noted.



339. EXCLUSION OF THE PUBLIC

The Schools Forum was asked to consider if the agenda item 340 relating to PFI / Building Schools for the Future (BSF) contractual matters should be considered in the absence of the public.

Resolved –

That the public be excluded from the meeting during the discussion of the following item (item *9) on the grounds that it is likely, in view of the nature of the business to be transacted or the nature of the proceedings, that if they were present exempt information within Paragraph 3 (Financial or Business Affairs) of Schedule 12A of the Local Government Act 1972 (as amended) would be disclosed and it is considered that, in all the circumstances, the public interest in allowing the public to remain is outweighed by the public interest in excluding public access to the relevant part of the proceedings for the following reason: commercial confidentiality."

340. PFI / BSF CONTRACTUAL MATTERS

The Schools Forum was asked to consider the information presented. The agenda item followed from considerations in recent meetings and the request made at the last meeting for more a detailed discussion.

This resolution is confidential and exempt information under Paragraph 3 (Financial or Business Affairs) of Schedule 12A of the Local Government Act 1972 (as amended).

341. SCHOOLS FORUM STANDING ITEMS

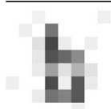
Updates on the Forum's standing items are provided verbally where these have not been covered within other agenda items.

Under 'update on academies and free schools' the Business Advisor (Schools) reported that there have been 5 further conversions of primary schools since the last Schools Forum meeting and that there are now 116 local authority maintained schools.

Resolved – That the information provided be noted.

342. AOB / FUTURE AGENDA ITEMS

No resolution was passed on this item.



343. DATE OF NEXT MEETING

Please see the published schedule of meetings – the next Forum meeting is scheduled for Wednesday 17 October 2018.

THESE MINUTES HAVE BEEN PRODUCED, WHEREVER POSSIBLE, ON RECYCLED PAPER
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SCHOOLS FORUM AGENDA ITEM

For Action



For Information



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

This report follows from the Forum’s discussion at the last meeting and asks Members to further consider the options for supporting schools that are under-subscribed and / or have falling rolls.

Date (s) of any Previous Discussion at the Forum

This matter was initially considered on 19 September 2018 (Document JE).

Background / Context

The minutes of the 19 September Schools Forum meeting record,

“The Business Advisor (Schools) presented a report, Document JE, which asked the Schools Forum to more closely consider the Authority’s school organisation strategy and the impact that falling rolls (under-subscription) is having on some schools in the District and the options that may be available to support these schools. The Business Advisor asked Forum Members for an initial steer on whether the options for supporting schools and / or academies from the DSG should be considered in more detailed. If the Forum requests this then a follow up report will be presented to the next meeting.

Summarising the Forum’s initial discussion on this matter, Members agreed that the options for financial support, through a Falling Rolls Fund and / or through the use of funding for exceptional circumstances de-delegated from maintained schools, should be considered in more detail.

- There is a level of ‘moral responsibility’ to ensure that schools facing exceptional circumstances receive appropriate support to maintain standards.
- The Deputy Director stated that a Falling Rolls Fund operated in her previous authority and this this added value.

Forum Members however, recognised that there may be potential difficulties with such support mechanisms, including how criteria could identify exceptional circumstances without removing the expectation that schools will take appropriate budget action, the cost to schools of the additional ‘top-slice’ that would be required, and the application of the restrictions that are placed by the DSG Regulations. For example, financial support can only be provided to schools and academies from a Falling Rolls Fund where these are judged Good or Outstanding by Ofsted. De-delegated funding only applies to maintained schools.

The longevity of mechanisms (under NFF transition) must be considered.

The ‘fairness’ of an approach needs to be tested. It was recognised by Members that such mechanisms would not provide support in all cases, including to academies that may admit a significant number of pupils (a bulge) after the Census is taken.

Forum Members formed an initial view that financial support should only be temporary / transitional, that the potential cost going forward (and the number of schools and / or academies going forward that would potentially be eligible) should be modelled, and that options should be considered to enable support to be provided on an ‘individual cost basis’ rather than a blanket formula. The Forum also indicated that it may wish to look at the extent to which any mechanism would only be applied to a specific phase (primary or secondary).”

Details of the Item for Consideration

Please see Appendix 1, which sets out an initial proposal for a Falling Rolls Fund, which we now ask the Forum to consider to be published for initial consultation.

As we set out in Document JE presented to the last meeting, this has so far been presented to the Authority as a primary-phase issue. This proposal therefore focuses on the primary phase. Secondary-phase representatives will wish to consider how this matter affects the secondary phase. However, the Authority is currently minded to suggest that Falling Rolls mechanism is not extended to the secondary phase in 2019/20.

Details of the Item for Consideration

As we summarised at the last meeting, there are 2 ways direct financial support could be provided from the DSG:

- A Falling Rolls Fund for both maintained schools and academies.
- The use of exceptional circumstances de-delegated funding available only for primary maintained schools.

Under a Falling Rolls Fund, local authorities may set aside Schools Block funding to create a small fund to support good schools with falling rolls, where local planning data shows that the surplus places will be needed within the next three financial years. A Falling Rolls Fund would be a mechanism through which support could be provided to both maintained schools and academies and both would be required to contribute to the cost of the fund. This is the only route through which financial support could be provided locally from Bradford's DSG to under-subscribed academies. The value of a Falling Rolls Fund could be quite limited however, when looking purely at under-subscription. One of the big limitations is the mandatory requirement that only good schools are eligible, meaning that a number of schools and academies would currently not be supported, including those recently converted sponsored academies that do not have Ofsted judgements.

Under the existing de-delegated exceptional circumstances fund, we could allocate monies to eligible maintained primary schools, using the Falling Rolls mechanism, without the application of the Ofsted good trigger (trigger 3). This would mean that we could support these schools that may be facing under-subscription issues that are related to demographics not to the popularity of the school. Academies however, including recent sponsored conversions, would neither contribute to nor be able to access this funding and funding would cease when a maintained school converts to an academy. There are therefore, some knock-on consequences to using delegated funds in this way that should be fully considered.

We recommend that we consult now with schools on the principles for the establishment of a Falling Rolls Fund and (possible) de-delegated fund support arrangements. During the consultation period we will further model the options, scope (trigger point thresholds), cost implications (top-slice needed) and future year impact using the latest October 2018 Census data and will present this modelling to the Schools Forum on 5 December for a final recommendation on what to do for 2019/20. If agreed, this Fund would not be established before April 2019 and, likely, allocations will not be considered until March 2020.

The 5 key questions for the Schools Forum at this stage are:

- 1. Should we consult on establishing a Falling Rolls Fund for the 2019/20 financial year within our primary & secondary consultation?**
- 2. If so, should we indicate that this may be applied to both the primary and secondary phases, or just to the primary phase in 2019/20 (the secondary phase is generally currently significantly expanding and numbers are fluid; we have worked on the basis that the Forum would only wish to consider this for the primary phase in 2019/20)?**
- 3. Is the Forum ok with consulting on the 'starter for 10' proposal that is set out in Appendix 1; the scope (trigger points, thresholds), the criteria and the method of funding?**
- 4. Recognising that a Falling Rolls Fund will not help schools or academies that are not Good or Outstanding, would Forum Members wish to extend the Falling Rolls Fund mechanism to maintained schools by removing the Ofsted trigger and funding this separately from a SIFD / exceptional circumstances de-delegated fund? Or would the Schools Forum wish these schools to be supported only through the Authority's licensed deficits framework, with a de-delegated fund potentially supporting (as now) the cost of action in exceptional circumstances?**
- 5. Recognising that de-delegation does not apply to academies, re. question 4, how would the Forum feel about there being a mechanism for financial support for under-subscribed maintained schools that is not available for under-subscribed academies, including for maintained schools that have recently converted under sponsored arrangements?**

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

The cost of financial support for primary and secondary schools would be charged to the Schools Block.

The cost of a Falling Rolls Fund would be met by contributions from both maintained schools and academies.

The cost of de-delegated exceptional circumstances funding would be met only by maintained schools.

Recommendations

The Schools Forum is asked consider the report and to decide whether schools should now be consulted on this matter within the 2019/20 primary and secondary Schools Block formula consultation.

List of Supporting Appendices / Papers (where applicable)

Appendix 1 – Falling Rolls Outline Proposal

Contact Officer (name, telephone number and email address)

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Outline Proposal Schools Block Falling Rolls Fund

1. Background

- 1.1 Local authorities are able to top-slice the Schools Block in order to create a small fund to support good schools with falling rolls and surplus capacity. This is primarily intended for where population growth is expected in the near future but where a good and necessary school, or academy, currently has surplus places and faces an unmanageable financial position in the short term, where significant action (redundancies) would be needed, and additional costs incurred, to contain spending within budget.
- 1.2 The Falling Rolls Funds is ring-fenced. It operates in a similar way to the Growth Fund, in the sense that both maintained schools and academies are top-sliced for the cost of the Fund and both are eligible to receive support through it. The Falling Rolls Fund can work on a phase specific basis.
- 1.3 It is mandatory that the Falling Rolls Fund is restricted to:
 - 1.3.1 Good or outstanding schools or academies.
 - 1.3.2 Schools or academies where planning data shows that the surplus places will be needed within the next three financial years.
- 1.4 Local authorities are required to provide, on a transparent and consistent basis, the criteria on which any monies are to be allocated. The criteria should set out both the circumstances in which a payment could be made and the basis for calculating sums.
- 1.5 The Schools Forum is required to agree the criteria and the total sum to be held within the Schools Block. The criteria are vetted by the ESFA annually.

2. Guiding Principles

- 2.1 The approach to support funding must work within the rules set by the DfE. The Falling Rolls Fund therefore, cannot be a mechanism for supporting schools or academies that do not have a Good or Outstanding Ofsted judgement. This includes maintained schools that have recently converted to academy under sponsored arrangements that are yet to be assessed. It also cannot be a mechanism for funding under-subscribed schools where planning data does not show that surplus capacity will shortly be needed.
- 2.2 Additional funding should be allocated in recognition only of exceptional circumstances and we would expect only a small number of schools or academies to qualify. The funding system (reliance on the October Census) is quite crude and many schools and academies manage effectively a level of fluctuation in pupil numbers during the year and between years. The system also runs on a lagged basis, meaning that there is already some protection for schools that are falling in numbers.
- 2.3 The cessation of a defined / planned bulge class (or half class) should not trigger Falling Rolls funding nor should a school or academy that is permanently reducing its PAN.
- 2.4 The Fund would support Reception to Year 11 only (not early years nor post 16).
- 2.5 Support should only be temporary / transitional. Funding must not support a situation that does not have a resolution (within three years).
- 2.6 The cost to the DSG (and therefore, the top-slice cost on other schools or academies) must be limited and controlled.

- 2.7 The option for providing additional funding must not relieve the school or academy of its responsibility to take action to manage its budget, which includes the use of surplus balances.
- 2.8 Funding must not reward poor performance or poor decision making on the part of the school or academy (the root of the circumstances should be factors not under the control of the school or academy).
- 2.9 The process of assessing a school's or academy's eligibility for funding should include the Local Authority's finance, school improvement and places planning officers.
- 2.10 Principles 2.1 to 2.9 mean we would wish to define:
- 2.10.1 Two key triggers for additional support to be a) a significant reduction in numbers on roll, together with b) a significant number of surplus places in total. It is important for a system to have both these triggers. The first trigger is important as it indicates that change has taken place and that action is now needed (reference paragraph 1.1).
- 2.10.2 Quite high qualification thresholds for these two trigger points, or setting these triggers to combine in such a ways as, to ensure the fund only supports 'exceptional circumstances'.
- 2.10.3 A mechanism, which looks at the total position of the school or academy, rather than just the position in a single year group or key stage.
- 2.10.4 Additional criteria, which focus on requiring the school or academy to evidence the action that it has taken already as well as the action that will need to be taken to contain spending within budget. This would include how the school's or academy's reserve is being deployed. This would be part of a detailed budget discussion with the school or academy within the eligibility assessment process.
- 2.10.5 A formula basis for funding, but with some additional measures to control the cost of the Fund to other schools and academies, which would include:
- 2.10.5.1 The option to scale back allocations into an agreed budget.
- 2.10.5.2 Establishing a maximum value of funding allocated in any given year to a school or academy.
- 2.10.5.3 These control measures would likely mean that allocations would not be confirmed with the school or academy until the end of the financial year and may be allocated retrospectively only with sight of the school's or academy's budget and surplus balances position as well as the number of schools or academies that are potentially eligible. This is an approach that appears to be followed by a number of the 27 local authorities that operated a Falling Rolls Fund in 2018/19.

3. Proposed Criteria for allocations in 2019/20 (Primary Phase Only)

- 3.1 The primary school or academy must meet all of the following 6 triggers (* with the exception of schools and academies that are expanding or have recently expanded at the request of the Authority where trigger 1 will not apply):
- 3.1.1 Trigger 1: The total number on roll in October 2018 must have reduced by at least 3% on October 2017 (* not applicable to schools and academies that are expanding or have recently expanded). This is an initial trigger identifying change; that either new budget action needs to be taken (to contain spending) or financial support could be allocated to protect capacity. Once a school or academy has met all eligibility criteria and receives Falling Rolls Funding, this trigger is not again applied until the school's roll increases above the trigger 2 threshold (recognising that a school may have a blip of 2 years, which it will carry and will need support for after its roll year on year has stabilised and then has begun to increase). For reference, 3% for a 1FE school = 6; 2FE = 13; 3FE = 19.

- 3.1.2 Trigger 2: The total number on roll at October 2018 must be lower than 90% of total PAN capacity number agreed with the Local Authority, with the capacity calculation adjusted where the school or academy is in the process of establishment or permanent expansion. For comparison, a 1FE primary school that achieves 27 in every year group (not 30) = 90% (189); 2FE with 54 (not 60) = 90% (378); 3FE with 81 (not 90) = 90% (567).
- 3.1.3 Trigger 3: Must be judged Good or Outstanding by Ofsted both at the time funding is confirmed.
- 3.1.4 Trigger 4: The Local Authority's planning data must show that the surplus capacity is needed within 3 financial years i.e. either the school's or academy's intake number will recover back to PAN and / or the surplus places in later year groups are needed, within 3 years. This means that a 'blip' in intake number is limited to 2 censuses before recovery. More than 2 censuses = the school or academy is expected to take action to reduce spending, rather than be allocated additional funding, because the implications of the 'blip' are longer term. It is important to identify that even a 2 year blip in intake, depending on its size, could have a financial impact on a school or academy that takes up to 6 years to work its way through unless pupils are admitted post reception. Therefore, Falling Rolls Fund support may be committed for a longer period of time on a sliding-scale basis.

On indicative modelling of a 1FE primary school whose intake reduces from 30 to 15:

- A 2 year blip = 6 years of funding would required until the school's total NOR exceeds 90%
- A 1 year blip = no funding (the school's NOR does not drop below 90%)

On indicative modelling of a 2FE primary school whose intake reduces from 60 to 30:

- A 2 year blip = 6 years of funding would required until the school's total NOR exceeds 90%
- A 1 year blip = no funding (the school's NOR does not drop below 90%)

On indicative modelling of a 3FE primary school whose intake reduces from 90 to 60:

- A 2 year blip = no funding (the school's NOR does not drop below 90%)
- A 1 year blip = no funding (the school's NOR does not drop below 90%)

- 3.1.5 Trigger 5: That the reduction in number on roll does not come from the exit of an identified agreed bulge class or from the permanent reduction in PAN.
- 3.1.6 Trigger 6: That the school or academy evidences, with reference to detailed information, the budget action that has already been taken, how surplus balances are being used to support the budget position, and how the school's or academy's spending can still not be brought within budget without the need to deliver staffing re-structure, including redundancies, that will result in additional cost. Essentially, the school or academy is required to demonstrate that the Falling Rolls Fund is the 'value for money' option; the cost of Falling Rolls Funding is less than the cost of action that would need to be taken.

4. Proposed Formula 2019/20 (Primary Phase only)

4.1 We propose a basic initial formula of: £base APP (AWPU) value x 80% x ((PAN x 90%) - NOR)

- 4.1.1 This has similarity with the approach taken in the funding of growth and bulge classes, which uses 80% of the £Base App value.
- 4.1.2 Funding would top up to 90% of NOR only (as trigger 2 is based on an assumption that all schools and academies will manage 10% under-occupancy within their own budgets).
- 4.1.3 Funding would be re-calculated annually based on latest Census numbers. Funding will reduce as numbers on roll increase on a sliding-scale basis.

4.2 However:

- 4.2.1 We propose to set a maximum annual allocation value of £100,000 for any one school or academy.

4.2.2 We also propose that allocations can be scaled back to fit into budget. Essentially we would do this by reducing from using 80% of the AWPU value to e.g. 50%. We would discuss this with the Schools Forum when we present proposed allocations. It would be up to the Forum to decide whether to scale back or whether to allocate additional funding from the DSG to cover the full cost. To this end, and also to enable the most effective challenge under trigger 6, we propose that allocations are presented to the Schools Forum in March 2020 (at the end of the 2019/20 financial year).

SCHOOLS FORUM AGENDA ITEM

For Action



For Information



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

This report asks the Forum to consider the consultation document, which outlines the proposals for the Schools Block, for the formulae to be used to calculate budgets for Primary and Secondary schools and academies for the 2019/20 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.

Date (s) of any Previous Discussion at the Forum

A report outlining the developing proposals for 2019/20 funding arrangements was presented to the Schools Forum at the last meeting.

Background / Context

Please see Appendix 1 (the consultation document itself). 3 FFWG sessions were run on 1, 2 and 4 October.

Details of the Item for Consideration

Each autumn the Local Authority, with the agreement of the Schools Forum, publishes 3 separate consultations on DSG management and formula funding arrangements for the following year.

Appendix 1 represents the formal consultation document on Schools Block arrangements for 2019/20. This consultation presents proposals for the formulae to be used to calculate budget shares for primary schools and academies, for the criteria to be applied in the allocation of the Growth Fund and other Schools Block centrally managed funds, and asks for feedback on the position of de-delegated Schools Block funds.

A separate report is presented, which sets out in more detail as requested the options for supporting falling rolls / under-subscription.

The consultation document incorporates discussion on a transfer of funds from the Schools Block to the High Needs Block in 2019/20.

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

As set out in Appendix 1. There are 7 key decisions to made.

Recommendations

The Schools Forum is asked to agree that the consultation document (Document JK Appendix 1) is published.

List of Supporting Appendices / Papers (where applicable)

Appendix 1 – Primary and Secondary 2019/20 Formula Arrangements Consultation (a,b,c)

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CONSULTATION & INFORMATION ON PRIMARY & SECONDARY FUNDING FORMULA 2019/20 FINANCIAL YEAR

Document JK Appendix 1a

1. Introduction

1.1 This document sets out the Authority's proposals for:

- The calculation of budget shares for mainstream primary (reception to year 6) and secondary (year 7 to year 11) schools and academies in Bradford for the 2019/20 financial year (the "funding formula"). For those who may not wish to read the full detail of this document, an extended summary of the formula funding proposals is given in paragraph 3.
- The criteria to be used to allocate additional amounts from centrally retained funds within the Schools Block of the Dedicated Schools Grant (DSG), including from the Growth Fund.
- The establishment of a new Falling Rolls Fund within the Schools Block.

1.2 This document also asks for feedback on the continuation for the 2019/20 financial year of funds de-delegated from maintained primary and secondary schools. Please be aware however, that due to the timescale necessary for confirmation, the Schools Forum has already decided to continue de-delegation in 2019/20 from maintained primary schools for the purposes of subscribing to Fischer Family Trust.

1.3 The deadline for responses to this consultation is **Friday 30 November 2018**. An analysis of responses received will be discussed at the Schools Forum meeting on 5 December. Please address all questions and responses to Andrew Redding 01274 432678 andrew.redding@bradford.gov.uk. A response form is included at Appendix 6.

1.4 Please note that separate consultation documents, on Early Years Block and High Needs Block funding arrangements for 2019/20, are published on Bradford Schools Online. These consultations are signposted from our latest news and updates page [here](#).

2. Background

2.1 The message "DO NOT PANIC" has been communicated in our consultations in recent years. This remains an important message. The Minimum Funding Guarantee (MFG) continues to protect schools and academies against sharp reductions in any single year in per pupil funding due to formula or school census data changes. The level of MFG provided is one of the key decisions that must be made for 2019/20.

2.2 However, we are currently in a period of change, one the more significant being the establishment of a National Funding Formula (NFF) for the calculation of primary and secondary mainstream budget shares. Another of the more significant changes is the movement towards a NFF for the allocation of High Needs Block funding. A briefing note, which summarises the latest announcements on NFF and which was written for Bradford's Schools Forum in September, can be viewed below, along with the DfE's latest NFF policy summary [here](#) (link to the School Forum webpage 19 September; Document JC).

For reference, the DfE's detailed July 2018 announcements, and a link to the DfE's original September 2017 NFF announcements, can be viewed [here](#).

Quite significantly, in terms of our short term view, the DfE has announced that local authorities will retain operational responsibility for determining primary and secondary mainstream funding formulae for at least 2 more financial years. We had expected this responsibility to pass to Government at April 2020, meaning that 2019/20 would have been the final year of local formula funding arrangements. However, although clearly on the horizon, the implementation date for the 'hard' **Page 23**

What this hard NFF will look like when it does come is also a little uncertain. Although we would expect it to be similar to the NFF currently constructed, the DfE has stated that elements of this formula, such as pupil mobility and low prior attainment, are under review. The DfE has also very clearly stated that the future direction of NFF, how much money it allocates and how the protections currently within it continue or release (including the Minimum Funding Guarantee), will be influenced by the outcomes of the autumn 2019 spending review. We do expect some changes in the composition of the NFF for 2020/21, including a new pupil mobility formula and possibly changes in the secondary low prior attainment factor. The DfE however, has not yet made any announcements about formula funding arrangements, and the values of DSG funding available to local authorities, in 2020/21. We do not expect to hear anything until next year.

The position of Pupil Premium after 2019/20 is also to be decided – whether and how this continues (as a separate grant funding stream or merged into the NFF). The longer term positions of other significant grants, including UIFSM, PE and Sports Grant and Year 7 Catch Up, as well as the new Teacher’s Pay Grant and the indicated additional grant funding that will be allocated in 2019/20 to support the increased cost of employer’s contributions to teacher pensions, are also to be decided within the autumn 2019 spending review.

2.3 We set out in our [autumn 2017 consultation](#) (*this is a useful reference document as it provides a summary of the DfE’s policies and how we’ve got to where we are*) the changes we proposed to make to Bradford’s mainstream primary and secondary funding formula in 2018/19 in preparation for the establishment of the ‘hard’ NFF. These changes built on those we made in 2017/18, which were influenced by our analysis of the proposals the DfE set out in its December 2016 consultation. To briefly summarise what we did for the current 2018/19 financial year:

1. We replaced our local formula with the DfE’s NFF, using this as closely as the Regulations and affordability allowed to calculate individual formula allocations for both primary and secondary phases. We were one of 41 authorities nationally that did this. Within this, we adopted a principle for the clearer ‘earmarking’ of primary-phase and secondary-phase funding within the Schools Block i.e. we sought to spend primary Schools Block resource on the primary phase and secondary on the secondary phase.
2. We retained unchanged our existing local approaches in areas of formula funding that NFF does not yet cover. These are:
 - Pupil Mobility.
 - Business rates (actual cost).
 - Split sites.
 - PFI (Building Schools for the Future).
 - Growth Funding.
 - The definition of Notional SEND.
 - The SEND Funding Floor (where we protected each school’s 2018/19 allocation at 2017/18 cash levels, funded by the High Needs Block).
3. We did not transfer any monies from the Schools Block to the High Needs Block.
4. We set a Minimum Funding Guarantee (protecting individual schools) at positive 0.4% per pupil. This meant that all schools, regardless of NFF impact, received a minimum 0.4% per pupil formula funding increase.
5. We set a Ceiling (capping gains for individual schools) at positive 3.0% per pupil.
6. We established the DfE’s new optional minimum levels of per pupil funding (MFL) at their full values of £3,500 (primary) and £4,800 (secondary). We matched fairly closely the NFF methodology for the calculation of this funding, so far as the Regulations permitted, but we did not exclude split sites or pupil mobility funding from the calculation of the minimum levels.

2.4 There were a couple of specific issues that were created by our movement to NFF that we said we would look at more closely for 2019/20. These were:

- The knock on implications for our Notional SEND calculation, where our movement to NFF, because of the increased weighting this gives low prior attainment, has meant that the values of notional SEND budget for all schools have substantially increased. We said that we would benchmark our notional

SEND approach against what other authorities have done in 2018/19 and consider whether we should adjust our calculation for 2019/20.

- The knock on implications for our SEND Funding Floor, where our movement to NFF, because of the increased weighting this gives Additional Educational Needs (AEN), has meant that most schools would not receive SEND Floor Funding. We agreed to protect allocations in 2018/19, by guaranteeing that all schools would receive at least the same cash allocation in 2018/19 as they did in 2017/18. We said we would review the position for 2019/20.

2.5. The combination of our transfer of £5.7m from the Schools Block to the High Needs Block in 2017/18 and our implementation of the DfE's NFF to calculate individual school budget shares in 2018/19 has created the following formula funding landscape in Bradford:

- Primary phase: in 2018/19, 128 out of 156 schools (82%), including academies, were funded on the 0.4% Minimum Funding Guarantee, at a total value of £7.11m. 4 schools were capped by the 3% ceiling, by a reduction in total of £0.03m. 15 schools were funded at the £3,500 minimum level, receiving £0.80m in total via this factor. All other schools were funded above £3,500 per pupil.
- Secondary phase: in 2018/19, 13 out of 29 schools (45%), including academies, were funded on the 0.4% Minimum Funding Guarantee, at a total value of £1.48m. 3 schools were capped by the 3% ceiling, by a reduction in total of £0.25m. 2 schools were funded at the £4,800 minimum level, receiving £0.52m in total via this factor. All other schools were funded above £4,800 per pupil.
- All through schools: in 2018/19, 3 out of the 4 academies (75%) were funded on the 0.4% Minimum Funding Guarantee, at a total value of £0.28m. None of these academies were capped by the 3% ceiling. All of these academies were funded above the £4,042 minimum level.

From these summary statistics, it is quite easy to see how important decisions regarding the Minimum Funding Guarantee are to the values of budget shares received by our schools and academies.

3. Formula Funding Proposals for 2019/20

3.1 There are **7 key decisions** we need to take on Bradford's 2019/20 mainstream primary and secondary funding formula arrangements. These are very similar to the types of decisions that were needed for 2018/19. These are:

1. Whether we continue to closely mirror NFF and adopt 'directed' change (in the prior attainment primary variable adjustment and in the MFL factor).
2. Whether we transfer budget from Schools Block to the High Needs Block in support of high needs sufficiency delivery.
3. Directly influenced by decision 2:
 - a. The value of Minimum Funding Guarantee we provide. The Government permits this to be set between positive 0.5% and minus 1.5%. 0% would mean, for example, that a school that is funded on the MFG and has the same pupil numbers recorded in October 2018 as in October 2017 would receive the same core formula funding in 2019/20 as they received in 2018/19.
 - b. The value of uplift to formula variables under NFF, where we would mirror the level of MFG we set (so a 0% MFG would mean cash flat formula variables).
 - c. Whether we use the new optional factor, which would provide a minimum of a 1% increase on published 2017/18 NFF per pupil baselines for each school.
4. The value of the ceiling we adopt, if we adopt one, which will cap increases for schools and academies that may be gaining from the 2019/20 formula funding approach and / or NFF.
5. Whether we continue our existing local approaches to the factors not yet covered by the NFF.

6. Whether we retain our existing Growth Fund methodology and criteria.

7. Whether we take any specific action in relation to the issue of falling rolls and ‘under-subscription’.

3.2 Against the 7 decisions then, the Authority proposes the following. Within these proposals, in certain places, we refer to ‘subject to final affordability’. The modelling (appendices 1 and 2) using the existing October 2017 Census dataset indicates that the proposals set out below are affordable. However, the cost of formula funding in 2019/20 will change once the October 2018 Census dataset is used e.g. FSM%s go up and down, prior attainment scores change. We cannot predict with total accuracy what the change in cost will be; the cost won’t be confirmed until the dataset is released by the DfE in December. Therefore, in this consultation, we must place caveats in certain places.

Decision 1 – Whether we continue to closely mirror NFF and adopt ‘directed’ change

3.3 The table below shows the variable values of the DfE’s NFF applied to Bradford in 2019/20 (so including Area Cost Adjustment). These are the same as applied in 2018/19, with the exception of the value of the primary phase low prior attainment variable, which is highlighted, which the DfE has reduced from £1,055 to £1,022. The DfE has done this to retain the total proportion of spend nationally on low prior attainment in the primary phase as the changes made to the Early Years Foundation Stage Profile in 2013 now fully work through.

| Factor | NFF £ 2019/20 |
|---|--------------------------|
| Primary – Base £APP | £2,747.44 |
| Secondary – Key Stage 3 Base £APP | £3,863.62 |
| Secondary – Key Stage 4 Base £APP | £4,386.70 |
| Lump Sum – Primary & Secondary | £110,017 |
| Primary - Deprivation – FSM Ever 6 | £540.09 |
| Primary - Deprivation – Flat FSM | £440.07 |
| Secondary - Deprivation – FSM Ever 6 | £785.13 |
| Secondary - Deprivation – Flat FSM | £440.07 |
| Primary - Deprivation – IDACI F | £200.03 |
| Primary - Deprivation – IDACI E | £240.04 |
| Primary - Deprivation – IDACI D | £360.06 |
| Primary - Deprivation – IDACI C | £390.06 |
| Primary - Deprivation – IDACI B | £420.07 |
| Primary - Deprivation – IDACI A | £575.09 |
| Secondary - Deprivation – IDACI F | £290.05 |
| Secondary - Deprivation – IDACI E | £390.06 |
| Secondary - Deprivation – IDACI D | £515.08 |
| Secondary - Deprivation – IDACI C | £560.09 |
| Secondary - Deprivation – IDACI B | £600.10 |
| Secondary - Deprivation – IDACI A | £810.13 |
| Primary - English as an Additional Language (3) | £515.08 |
| Secondary - English as an Additional Language (3) | £1,385.22 |
| Primary – Low Prior Attainment | £1,022.16 |
| Secondary – Low Prior Attainment | £1,550.25 |
| Primary – Minimum £APP | £3,500 |
| Secondary – Minimum £APP | £4,800 |

3.4 So the NFF in 2019/20 retains the same dynamic, including its focus on Additional Educational Needs (AEN), low prior attainment within AEN, and the reduction in the value of the lump sum, which is the most significant factor in terms of impact on the primary phase.

3.5 The Authority’s case for moving in 2018/19 to fully replicate the DfE’s NFF in our calculation of individual primary and secondary formula allocations was strongly supported. As such, we believe that schools will continue to support the principle that, in this period prior to the establishment of the ‘hard’ NFF, our local formula funding arrangements should move in line with the DfE’s NFF as this incrementally may develop.

3.6 We propose therefore, that **we amend our local formula to adopt the lower prior attainment variable value in the primary phase**. As the modelling in Appendix 1 shows, materially, the impact of this reduction on individual primary allocations is negated in the vast majority of cases by either the Minimum Funding Guarantee or the £3,500 Minimum Level of Funding.

3.7 We also propose that **we amend our calculation of the £3,500 (primary) and £4,800 (secondary) minimum per pupil funding** to come more closely in line with the DfE's NFF calculation, which excludes the additional funding that schools may receive via split sites and pupil mobility factors.

3.8 We do not propose to alter our primary and secondary funding formula in 2019/20 other than for these two amendments. The indicative impact of both these amendments is shown in Appendix 1.

Question 1 - Do you agree with the proposal to continue to mirror the DfE's NFF to calculate primary and secondary school and academy formula funding allocations in 2019/20, incorporating the amendments to the primary-phase low prior attainment variable value and to the calculation of the MFLs? If not, please explain the reasons why not.

Decision 2 - Whether we transfer budget from Schools Block to the High Needs Block

3.9 **The Local Authority proposes that the sum of £2.0m of budget (which is slightly under 0.5% of the Schools Block) is transferred from the Schools Block to the High Needs Block in 2019/20.** The basis for this proposal is set out in more detail in Appendix 3. This is rooted in the current position in Bradford where the need for spending on provision for high needs children and young people is growing at a faster rate than our High Needs Block NFF allocation.

3.10 What this transfer means, indicatively, for the formula funding allocations of individual primary and secondary schools and academies in 2019/20 is shown in Appendix 1 (columns 14 and 15). Essentially, a transfer of £2.0m means that the 2019/20 funding formula, including the Minimum Funding Guarantee, will be set at cash flat (0%) on 2018/19 rather than being set at positive 0.5%. As such, this transfer does not represent an 'active cut' to primary and secondary school budgets. It represents using the small amount of growth in the 2019/20 Schools Block DSG settlement to support high needs provision system pressure.

3.11 The Authority's proposal is one of four cross-block budget movements that seek to manage the pressure within an inter-related high needs funding system. All the positive growth across the DSG in 2019/20 is being allocated to support high needs spending. The relatively recent separation of the DSG into blocks (Schools Block, High Needs Block, Central Services Block, Early Years Block) is not helpful in this regard as it leads to the view that the blocks operate in isolation, where monies transferred between them are lost to originating block, when in fact spending is inter-connected. There are five very visible connections (dependencies) that exist between the Schools Block and the High Needs Block (HNB):

- Where the HNB does not provide for a sufficient number of specialist places for high needs children and young people the knock on consequences of this are felt across the system, including in mainstream primary and secondary schools. The HNB is reliant on schools delivering effective universal and alternative provision to support pupils with lower level higher incidence and emerging SEND. There then needs to be sufficient HNB funded provision to enable pupils with higher levels of SEND to receive support appropriate to their levels of need. 95% of the HNB (95% of £68m) is spent on delegated / places provision. The HNB for the 2019/20 academic year is forecasted to fund 686 more specialist places in Bradford-located settings than were initially planned to be funded in 2016/17 (2,634 in total, excluding out of authority and independent placements). A breakdown of the places funded by the HNB can be viewed within the High Needs Funding consultation. However, our demographic and needs-led data clearly evidences the need to continue to develop more places, incurring substantial additional cost to the HNB.
- The HNB funds the top up (element 3) for children and young people with EHCPs educated in mainstream primary and secondary schools and academies. The Schools Block funds elements 1 and 2 (in the national system these total £10,000) for pupils both with and without EHCPs. The SEND resources that are allocated within mainstream school budgets are shown for reference in Appendix 2. Where the numbers of pupils in mainstream school settings with SEND increases this creates a financial pressure on both the Schools Block and the HNB, where the Schools Block must fund a greater

number of element 2s and the HNB must fund a greater number of top ups. The number of children with EHCPs in mainstream schools in Bradford has increased substantially year on year, resulting in an annual growth in spending pressure in this element of the HNB of between 20%-22%; £1.1m - £1.3m in cash terms. This is additional spending from the High Needs Block for pupils that are educated in mainstream schools.

- The HNB, through the existing SEND Funding Floor mechanism, provides £0.48m of additional support to ensure that mainstream schools and academies have a minimum value of element 2 funding to support pupils without EHCPs.
- The HNB funds the place-element for 309 alternative provision placements across PRUs, the primary behaviour centres, alternative providers and education in hospital settings. These places are accessed by pupils without EHCPs that are on the rolls of mainstream primary and secondary schools and academies. This HNB spend continues then to support mainstream schools in managing the costs of alternative provision.
- The HNB continues to fund SEND teaching support services that work directly with mainstream schools and academies.

3.12 Our medium term financial modelling very clearly evidences that our HNB allocation from the DfE, on its own, is not sufficient to meet demand. As a result, there is both a high risk of deficit within our HNB and a risk around the creation of specialist places. Whilst the Authority continues to develop our strategy for the creation of more specialist places, and how we can balance our HNB, contributions are required across the DSG, including from the Schools Block. It is likely that a contribution will continue to be required in future years unless there is a significant change in the way the DfE transitions to NFF.

3.13 The NFF outcome for our High Needs Block 2019-2022 is significantly damped and is therefore, wholly inadequate. Bradford's 2019/20 allocation, calculated on needs-led data, should be c. £16.9m higher than our 2017/18 baseline. This increase however, is substantially reduced due to damping. An estimated £12.4m of the £16.9m growth we should receive now under the NFF 'end product' is missing. We expect only £4.2m of this £12.4m to be allocated to us over 2020-22; approximately an additional £2m a year. The impact of this transition is actually the root cause of our HNB financial problem. As an illustration, £1.3m of this £2m income growth in 2019/20 is immediately needed to meet the forecasted rising cost of EHCPs in mainstream settings before we begin to look at how we can finance more specialist places and meet other system pressures.

Question 2 - Do you agree with the proposal to transfer £2.0m from the Schools Block to the High Needs Block in 2019/20? If not, please explain the reasons why not.

Decision 3a – The value of Minimum Funding Guarantee we provide

3.14 Following from the proposal for the transfer of £2.0m of budget from the Schools Block to the High Needs Block, **the Authority proposes to set the Minimum Funding Guarantee (MFG) in 2019/20 at 0%.** 0% means that a school or academy that is funded on the MFG and has the same pupil numbers recorded in October 2018 as in October 2017 will receive the same core formula funding in 2019/20 as they received in 2018/19. This is shown at individual school and academy level in Appendix 1.

3.15 0% is proposed in sight of the following:

- This is the level of MFG we recommended in February 2018 that schools use in their budget planning going forward and we set up the Authority's budgeting software on this basis.
- Whilst the value of the overall school funding settlement continues to be eroded in real terms, due to the growth in salaries cost, there is new additional grant funding to be allocated – the Teachers' Pay Grant (limiting the cost of the September 2018 award on school budgets to 1%) and an expected additional grant to offset the increase in the employer's contribution to teacher pensions - which will in 2019/20 reduce the scale of this erosion and will improve the budget forecasts of schools. It is acknowledged that the position of these grants after 2019/20 is not clear nor is whether a further grant would accompany a pay award for teachers higher than 1% at September 2019. However assuming that this is the case, we estimate broadly that the overall average expenditure increase for primary

and secondary schools in 2019/20 will be between 2.3% and 2.8%. The two key drivers of this increase are the pay award for NJC scale associate staff (which is not supported by additional grant monies) and inflation on prices. This average expenditure increase is estimated to be lower than that to be met by special schools (3.3%) and nursery schools (3.5%) in 2019/20. Nursery schools will also be funded on a cash-flat (0%) basis in 2019/20. The position of the funding of special schools is still being reviewed, but the place-element, which allocates more than 50% of funding, is retained cash flat at £10,000 in 2019/20.

- The Authority expects to use a proportion of the projected under-spending within de-delegated funds in 2019/20 to reduce the cost to maintained primary schools of the maternity & paternity insurance scheme. Whilst this will only benefit maintained primary schools, the impact on these schools will be significant. We currently estimate that the cost per pupil will reduce in 2019/20 only from £43.28 to £19.11.
- The Authority proposes, with our consultation on the Early Years Single Funding Formula, to implement a new holistic Early Years SEND Inclusion Fund, which will allocate additional funding to low level emerging SEND in early years, funded from the Early Years Block. This will allocate new funding into primary schools and academies with nursery provision in 2019/20.
- The adoption of NFF has increased the funding in real terms of a number of secondary schools and academies. Without the application of a ceiling in 2019/20 (see decision 4), the NFF end product for 'winners' is now fully allocated. Even following a cash flat (0%) settlement, the total / average funding per pupil allocated to the secondary phase in 2019/20, indicatively, has increased by 1.6% compared with 2017/18.
- The £3,500 (primary) and £4,800 (secondary) minimum per pupil funding levels have been adopted in full. These are unaffected by a transfer from the Schools Block. A number of lowest funded schools and academies (15 primaries; 2 secondaries) have received significant funding growth as a result, which is consolidated in 2019/20.

Question 3 - Do you agree with the proposal to set the Minimum Funding Guarantee at 0% in 2019/20? If not, please explain the reasons why not.

Decision 3b – The value of uplift to formula variables under NFF

3.16 The values of the NFF variables in 2019/20, as applied to Bradford including Area Cost Adjustment, are shown in the table on page 4. Following from the proposals a) to transfer £2.0m of budget from the Schools Block to the High Needs Block and b) to set the Minimum Funding Guarantee (MFG) in 2019/20 at 0%, **the Authority proposes to retain the formula variables cash flat (also at 0%) on 2018/19.** Therefore, primary and secondary formula funding allocations would be calculated using the variable values shown on page 4 without further uplift.

Question 4 - Do you agree with the proposal to retain the NFF variables cash flat (0%) on 2018/19 in line with a 0% MFG? If not, please explain the reasons why not.

Decision 3c – Whether we use the new optional factor, which would provide a minimum of a 1% increase on published 2017/18 NFF per pupil baselines for each school

3.17 The proposal to transfer £2.0m of budget from the Schools Block to the High Needs Block allocates the growth within the 2019/20 Schools Block settlement. As a result of this, **it would not be possible to adopt the DfE's optional 1% factor.** However, in reviewing what this factor does, we have concluded that we would not wish to propose to adopt this in any case.

3.18 Column 16 in Appendix 1 shows what the difference would be between providing for a 0.5% increase on the 2018/19 formula funding settlement and a 1% increase on the 2017/18 settlement. The 1% factor does not affect the schools and academies that are funded on the MFLs (£3,500 and £4,800) but are not on the

MFG. A large number of secondary schools and academies are already in receipt of growth exceeding 1% per pupil so this factor would not add value here. For most remaining primary and secondary schools and academies, the difference the 1% factor makes is small; the difference between a 0.4% settlement in 2018/19 + a 0.5% settlement in 2019/20 = 0.9% vs. 1% on 2017/18; a difference of 0.1%. To adopt 1% now, we would effectively override the decision we took in 2018/19, for affordability reasons, to set the MFG at 0.4% not 0.5%. For a small number of primary schools and academies the difference is more sizable. This is because these schools are in receipt of pupil mobility funding and, whereas, pupil mobility funding is included in the calculation of the MFG, under the 1% option it is excluded and then added after a 1% increase has been allocated. The 1% factor then treats pupil mobility as an 'add on', because it is not included in the NFF yet, whereas we have always treated this as a factor that is part and parcel of a school's formula allocation as are the other additional educational needs factors. As such, we do not think it would be correct for us now to separate off pupil mobility funding in this way, especially as it is to be brought into NFF at April 2020.

Question 5 - Do you agree with the proposal not to implement the optional 1% increase per pupil on 2017/18 NFF baseline factor? If not, please explain the reasons why not.

Decision 4 – The value of the ceiling we adopt, if we adopt one

3.19 **The Local Authority proposes not to apply a ceiling in 2019/20, subject to final affordability.** A + 3.0% per pupil ceiling was in place in 2018/19 in recognition that the increases that NFF allocates to a small number of our schools and academies were capped at 3% by the DfE within our Schools Block DSG settlement i.e. we had not been given the money by DfE to fund increases in per pupil funding above 3%. However, the full values of NFF increases are now allocated to our Schools Block in 2019/20. As such, it feels fair to fully pass these increases out to schools and academies through our funding formula.

3.20 The schools that were affected by the ceiling in 2018/19 are shown in Appendix 1. Our modelling indicates that only a very small number of schools would be capped by a ceiling if there was one of e.g. 3% in 2019/20. Our modelling also indicates that the value of the reduction in funding for these schools would be substantial as a proportion of the school's allocation. Our modelling is currently based on October 2017 Census data and the position of schools on a ceiling may change when October 2018 Census data is used. Hence why we place a 'subject to final affordability' caveat here. However, we feel that it is now reasonable to permit the NFF to work un-capped as the two reasons for increases in per pupil funding from this point are a) NFF increase and b) October 2018 Census data evidencing a greater level of pupil-led need in the school.

Question 6 - Do you agree with the proposal not to apply a ceiling in 2019/20? If not, please explain the reasons why not.

Decision 5 – Whether we continue our existing local approaches to the factors not yet covered by the NFF

3.21 **The Local Authority proposes to continue our current 2018/19 formulae for the allocation of both split sites (see appendix 3) and pupil mobility.** These factors will be updated for October 2018 Census data. The values of the formula factors will be cash flat (0%) on 2018/19. As the NFF is likely to contain a factor for pupil mobility from April 2020, we feel it makes sense to retain our current formula in 2019/20 and to review whether we adopt the NFF approach in 2020/21 once the details of this are known.

3.22 Business rates will continue to be funded at actual cost.

3.23 **We propose to continue to pass through the specific BSF DSG affordability gap values using our current method** (see appendix 4), continuing the adjustment to ensure that the amounts passed on to academies by the ESFA on an academic year basis are equivalent to the amounts that the Authority requires academies to pay back on a financial year basis. The DfE is currently looking how PFI funding can be brought into the NFF but there is no timescale for this yet.

3.24 Following further analysis and benchmarking work, **we propose to continue to use our existing methodology for the definition of notional SEND budgets for mainstream primary and secondary schools and academies within the Schools Block funding formulae.** Please see Appendix 4. The DfE's work to better 'describe' SEND needs, responsibilities and costs, replacing the concept of a 'notional SEND budget', is continuing and this work will influence future policy on high needs funding.

3.25 Also following further analysis, **the Local Authority proposes to continue to protect SEND Floor allocations for primary and secondary schools and academies at 2017/18 levels, subject to the conclusion of the discussions that are to take place with the Schools Forum on the transfer of Schools Block monies to the High Needs Block in 2019/20** (decision 2). Please see Appendix 4 for the current SEND Floor methodology. We have identified that we need to find a better way of calculating additional mainstream SEND funding support now that we have moved to National Funding Formula. So review is planned by April 2020 and this will be discussed with the Schools Forum. This review most likely may not result in a change in the total value of support overall that will continue to be funded, but may result in this support being more concentrated. However, we wish to ensure continuity in 2019/20.

Question 7a - Do you agree with the proposal to continue to use our existing formulae for the allocation of split sites and pupil mobility funding? If not, please explain the reasons why not.

Question 7b - Do you agree with the proposal to continue to use our existing formula for the apportionment of BSF DSG affordability gap funding? If not, please explain the reasons why not.

Question 7c - Do you agree with the proposal to continue to use our existing methodology for the definition of notional SEND budgets? If not, please explain the reasons why not.

Question 7d - Do you agree with the proposal to continue to protect SEND Funding Floor allocations at 2017/18 cash values pending review for April 2020? If not, please explain the reasons why not

Decision 6 – Whether we retain our existing Growth Fund methodology and criteria.

3.26 The DfE's National Funding Formula does not yet include a methodology, which prescribes how Growth Funding should be allocated at individual school or academy level. Local authorities in 2019/20 therefore, retain the responsibility for determining arrangements locally, albeit within tight Regulations. Local authority compliance with these Regulations is checked annually by the ESFA.

3.27 Our proposed Growth Fund arrangements and criteria are set out in the documents embedded under paragraph 6. These are unchanged from current arrangements with the exception of some clarification on the timing of the confirmation of allocations to secondary schools and academies that have already begun expansion before 2019/20.

Question 8 - Do you agree with the proposed criteria and methodology for the allocation of the Growth Fund to schools and academies in 2019/20? If not, please explain the reasons why not.

Decision 7 – Whether we take any specific action in relation to the issue of falling rolls and 'under-subscription'.

3.28 Paragraph 7 sets out a proposal, in principle, **for the establishment of new Falling Rolls Fund within the Schools Block and also asks for feedback regarding the use of de-delegated funding in support of maintained schools only that are affected by falling rolls and / or under-subscription that would not be eligible for funding from a Falling Rolls Fund because of their latest Ofsted judgement.**

3.29 This is a matter still under consideration with the Schools Forum and, as such, feedback from schools and academies is important at this stage in helping to further shape proposals, especially on the scope of, and eligibility triggers for, financial support.

3.30 This has so far been presented to the Authority as a primary-phase issue. The proposal therefore, focuses on the primary phase. Secondary-phase colleagues will wish to consider how this matter affects them. However, the Authority is currently minded to suggest that Falling Rolls mechanism, if approved, is not extended to the secondary phase in 2019/20.

Question 9a - Do you agree with the proposal in outline to establish a Falling Rolls Fund within the Schools Block for the primary-phase in 2019/20? If not, please explain the reasons why not.

Question 9b - Do you agree with the proposed scope and eligibility triggers for the Falling Rolls Fund? If not, please explain the reasons why not.

Question 9c – Would you agree to the use of de-delegated funding to support maintained primary schools only (but not primary academies) that are facing falling rolls and / or under-subscription that are not eligible for the Falling Rolls Fund due to their latest Ofsted judgement?

4. Consultation Impact Modelling

4.1 As the set of decisions that are required to be taken for 2019/20 are relatively simple, the modelling attached with this document is also relatively simply.

- **Appendix 1** is a single sheet model, which shows the actual formula funding position of each primary and secondary school and academy for the current 2018/19 financial year and then the indicative position for 2019/20 where the settlement is cash flat (0%). The difference between a cash flat settlement and a 0.5% positive settlement is then highlighted. The impact of the reduction in the low-prior attainment variable value for the primary phase is also specifically shown. This appendix shows the value of Minimum Funding Guarantee funding within each school's and academy's formula allocation (showing the extent to which the school or academy is reliant on the MFG) as well as the value of MFL (£3,500 primary; £4,800 secondary) top up. This appendix also shows how much each school and academy currently receives via the SEND Funding Floor.
- **Appendix 2** is a single sheet model, which shows the total value of resources within school and academy 2018/19 financial year budgets allocated to support children and young people with SEND. This is an important reference document in the context of considering the pressure on the high needs funding system.

4.2 Appendix 1 is illustrative only for 2019/20. The pupil numbers and other data used to calculate allocations are the same as used in 2018/19 (they are based on the October 2017 Census), with the exception of some adjustments to the pupil numbers of newly establishing academies. So **this modelling is published only for the purposes of enabling schools and academies to understand how the main decisions on formula funding will affect their 2019/20 financial year formula allocations so that they are able to form a view and respond to this consultation. The modelling does not constitute indicative or final budgets for 2019/20.** The modelling makes no reference to:

- Changes in the number of pupils in schools that will be recorded in the October 2018 Census that will feed into 2019/20 allocations.
- Changes in data e.g. FSM% and prior attainment that will be sourced from the October 2018 Census data that will feed into 2019/20 allocations.

4.3 There are keys underneath both appendices 1 and 2, which explain each column.

4.4 All modelling uses the Authority's APT data and baselines. We are aware that a number of academies have different (higher) baselines within their GAG Statements due to specific agreements with the ESFA about levels of protected funding. For the purposes of our consultation modelling we have excluded these additional amounts so that we compare like with like on the figures that the Authority recognises and agrees.

4.5 If you would like to discuss the modelling in more detail, or discuss the data on which allocations are calculated, please contact Andrew Redding

5. 2019/20 Schools Block De-Delegated Funds

5.1 The Finance Regulations continue to significantly restrict the extent to which the Dedicated Schools Grant (DSG) can be held and managed centrally. The Government's intention is to ensure maximum delegation of the DSG to maintained schools and academies at the start of each year. The Regulations do allow funding for certain types of expenditure to be 'de-delegated', or passed back, from maintained school budgets within the

Schools Block. This only applies to schools maintained by the Local Authority and the Schools Forum must agree to de-delegate on a phase specific basis.

5.2 Previously, the Schools Forum has established Schools Block de-delegated funds to:

- take advantage of the economies of scale brought about by central management and bulk purchase e.g. Fischer Family Trust subscription.
- provide services that schools would find difficult or less cost effective to replace on an individual basis e.g. trade union facilities time.
- protect schools, especially smaller schools, against unpredictable expenditure e.g. maternity and paternity cover.
- provide funds to be available to support schools in financial difficulty or those facing exceptional circumstances, allocated using agreed criteria.
- cover the costs in schools of authority-level re-organisation, including safeguarded salaries and also the cost of deficit budgets of closing schools or deficits held by schools that convert to academy status under sponsored arrangements.

5.3 Decisions to de-delegate within the Schools Block must be taken annually.

5.4 The Schools Forum will further discuss the position of de-delegated funds for 2019/20 over the autumn term. This document asks for your feedback so this can be considered as part of these discussions. This consultation asks for your views only on whether funds should continue to be de-delegated. Please be aware that the values of these funds, where they continue, will be considered further. We would generally expect the values of funds to match anticipated cost pressures and to take account of the impact of maintained schools converting to academy status.

5.5 Please be aware that due to the timescale necessary for confirmation, the Schools Forum has already decided to continue de-delegation in 2019/20 from maintained primary schools for the purposes of subscribing to Fischer Family Trust.

5.6 Maintained schools are reminded that:

- Schools Forum members representing 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. It is assumed that the Schools Forum and maintained secondary schools will not wish to revisit this decision.
- Schools Forum members representing maintained primary schools agreed to the cessation of de-delegation for behaviour support services at 1 September 2018. Maintained schools now have the choice to buy into these services directly.

5.7 The following 'de-delegated' funds are held in the current 2018/19 financial year:

- School Behaviour Support Team (primary only and only to 31 August).
- FSM Eligibility Assessments (primary and secondary).
- Fischer Family Trust – School Licences (primary only).
- School Maternity / Paternity 'insurance' (primary only).
- Trade Union Facilities Time (primary & secondary).
- Trade Union Health and Safety Representative Time (primary & secondary).
- School Staff Public Duties and Suspensions Fund (primary only).
- School Re-Organisation Costs (primary and secondary).

- Exceptional Costs & Schools in Financial Difficulty (primary only).

Further information on these funds, including values held in 2018/19 and the criteria by which they are allocated, is given in Appendix 5.

5.8 We do not propose amendment in 2019/20 to the criteria for the allocation of de-delegated funds with the exception of possible adjustment, subject to this consultation, which would enable the SIFD / exceptional costs de-delegated fund to allocate funding to maintained primary schools facing falling rolls and / or that are under-subscribed.

5.9 If funding is not de-delegated for the purposes listed in 5.7 above, then the funding will remain within school budgets for schools to provide for the cost of services from their own resources, including purchasing services available through the Local Authority. The Authority is aware that the views of individual schools may be influenced by the extent of value they feel they receive from accessing these funds currently. In making final recommendations, the Schools Forum will consider specific responses to this consultation along with the overall most effective approach for maintained schools across the District. Please contact your Schools Forum representatives if you have any specific comments on these funds.

5.10 The Schools Forum has recently considered ([14 March 2018](#)) a detailed assessment of the Authority's current Trade Union Facilities Time arrangements, and has concluded that these arrangements are effective and continue to offer value for money.

5.11 Colleagues in maintained primary schools will be aware of the warnings that have been given previously about the viability of current arrangements for supporting maternity / paternity costs. We have warned, as happened in the secondary sector, that we may be moving towards the position where existing arrangements are no longer financially efficient or viable. This is due to the growth in cost at the same time as a reducing number of maintained schools. The maternity / paternity scheme will remain in place for 2019/20, subject to agreement through this consultation. However, the continuation of this from April 2020 will be reviewed. Schools will be given warning where a decision is taken to cease this fund and we will discuss with the Schools Forum how schools can be given sufficient time to respond.

Question 10 – Should sums continue or cease to be de-delegated from maintained school budgets in 2019/20 for the purposes listed above? Please explain the reasons why if you believe that these should cease or change.

6. Schools Block Growth Fund

6.1 We operate a Growth Fund within the Schools Block, which supports both maintained schools and academies expanding for basic-needs purposes at the request of the Local Authority to manage more effectively the financial pressures brought by places expansion. This fund helps to maintain a stable financial platform for schools and academies across the District in support of raising standards.

6.2 The DfE's National Funding Formula does not yet include a methodology, which prescribes how Growth Funding should be allocated at individual school or academy level. Local authorities in 2019/20 therefore, retain the responsibility for determining arrangements locally, albeit within tight Regulations. Local authority compliance with these Regulations is checked annually by the ESFA.

6.3 Our proposed Growth Fund arrangements and criteria are set out in the documents embedded below. These are unchanged from current arrangements with the exception of some clarification on the timing of the confirmation of allocations to secondary schools and academies that have already begun expansion before 2019/20.



Growth Funding
2019 - primary criteri



Growth Funding
2019 - secondary crit

6.4 For reference, the value of the Schools Block Growth Fund in 2018/19, broken down between phases and types, is shown in the table below:

| | Primary | Secondary | Total |
|----------------------------|-----------------|-------------------|-------------------|
| Existing Known Expansions | £326,927 | £166,146 | £493,073 |
| Existing Bulge Classes | £247,541 | £0 | £247,541 |
| New Expansions | £314,131 | £700,000 | £1,014,131 |
| Pre-Opening Costs | £0 | £0 | £0 |
| Diseconomies of Scale | £35,416 | £550,000 | £585,416 |
| Total Value 2018/19 | £924,015 | £1,416,146 | £2,340,161 |

We will confirm the value of the Schools Block Growth Fund for 2019/20 as part of the DSG setting process, which will be concluded with the Schools Forum in January 2019.

7. Falling Rolls Fund 2019/20 & De-Delegated Support for Maintained Schools

7.1 The issue of under-subscription and / or falling rolls was raised with the Schools Forum in September following the most recent round of budget discussions that the Local Authority has had with our maintained schools. A small number of maintained primary schools have specifically asked whether / what additional support can be provided to help them manage the situation and protect school standards. Schools have typically asked for support a) in helping to control the predictability of admission numbers (via PAN arrangements) and b) in helping to manage the financial impact of unpredictable and / or uneven pupil numbers.

7.2 This is a matter still under consideration with the Schools Forum and, as such, feedback from schools and academies is important at this stage in helping to further shape proposals, especially on the scope of, and eligibility triggers for, financial support.

7.3 This has so far been presented to the Authority as a primary-phase issue. The proposal therefore, focuses on the primary phase. Secondary-phase colleagues will wish to consider how this matter affects them. However, the Authority is currently minded to suggest that Falling Rolls mechanism, if approved, is not extended to the secondary phase in 2019/20.

7.4 There are two ways direct financial support for schools / academies that are facing falling rolls and / or under-subscription could be provided from the DSG:

- A Falling Rolls Fund for both maintained schools and academies.
- The use of exceptional circumstances de-delegated funding available only for primary maintained schools.

7.5 Under a Falling Rolls Fund, local authorities may set aside Schools Block funding to create a small fund to support good schools with falling rolls, where local planning data shows that the surplus places will be needed within the next three financial years. A Falling Rolls Fund would be a mechanism through which support could be provided to both maintained schools and academies and both would be required to contribute to the cost of the fund. This is the only route through which financial support could be provided locally from Bradford's DSG to under-subscribed academies. The value of a Falling Rolls Fund could be quite limited however, when looking purely at under-subscription. One of the big limitations is the mandatory requirement that only good schools are eligible, meaning that a number of schools and academies would currently not be supported, including those recently converted sponsored academies that do not have Ofsted judgements.

7.6 Under the existing de-delegated exceptional circumstances fund, we could allocate monies to eligible maintained primary schools, using the Falling Rolls mechanism, without the application of the Ofsted good trigger (trigger 3). This would mean that we could support these schools that may be facing under-subscription issues that are related to demographics not to the popularity of the school. Academies however, including recent sponsored conversions, would neither contribute to nor be able to access this funding and funding would cease when a maintained school converts to an academy. There are therefore, some knock-on consequences to using delegated funds in this way that should be fully considered.

7.7 The Schools Forum, as it continues to consider this matter, has asked that feedback is now collected from schools and academies on these two support options and has agreed to consult with schools and academies on the proposal for a Falling Rolls Fund set out in the document embedded below:



Proposal Outline Oct
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8. Consultation Responses

8.1 Please use the responses form in Appendix 6 to submit your views on the proposals outlined in the consultation. There is space on this form for you to comment on any aspect of the proposals. If you wish to discuss these proposals in more detail, or have any specific questions, please contact Andrew Redding, using the contact details shown in paragraph 1.

8.2 Please ensure that your response is submitted by the deadline of **Friday 30 November 2018**. Any responses received after this deadline date may not be included in the overall analysis presented to the Schools Forum.

9. Next Steps

9.1 Following consideration of the responses to this consultation and the recommendation of the Schools Forum, the structures of the primary and secondary funding formulae to be used to calculate budgets in 2019/20, and the criteria for the allocation of Schools Block DSG contingency funds and growth funds, will be set by the Council's Executive.

9.2 Discussions on the overall DSG funding position for 2019/20 will take place in the Schools Forum between now and January 2019. You are recommended to keep in touch with these discussions by visiting the Schools Forum webpage on the Council's Minute's site [here](#).

9.3 It is anticipated that the Schools Forum will make its final recommendations on 2019/20 arrangements on Wednesday 9 January 2019.

10. Appendices

- Appendix 1 – Financial Overview (Modelling)
- Appendix 2 – SEND Resources in Schools (Summary)
- Appendix 3 – Schools Block to High Needs Block Transfer
- Appendix 4 – Technical Annex
- Appendix 5 – Schools Block De-Delegated Funds
- Appendix 6 – Responses Questionnaire

Appendix 3 – Schools Block to High Needs Block Transfer 2019/20

1) Introduction

1.1 The Authority's proposal is to transfer to the High Needs Block (HNB) up to, but not exceeding, 0.5% of the Schools Block. This is c. £2.0m in cash terms. This is rooted in the current position in Bradford where the need for spending on provision for high needs children and young people is growing at a faster rate than our High Needs Block NFF allocation.

1.2 Our medium term financial modelling very clearly evidences that our HNB allocation from the DfE, on its own, is not sufficient to meet demand. As a result, there is both a high risk of deficit within our HNB and a risk around the creation of specialist places. Contributions are required across the DSG, including from the Schools Block. It is likely that a contribution will continue to be required in future years unless there is a significant change in the way the DfE transitions to NFF.

1.3 A transfer from the Schools Block to the High Needs Block in 2019/20 is a 'one off' action, in the sense that, unlike the transfer made in 2017/18 prior to the introduction of National Funding Formula (see paragraph 2 below), any transfer drops out in the following year and does not affect the way that DSG monies are allocated to the Authority in the future.

1.4 Essentially, a transfer of £2.0m means that the 2019/20 formula settlement for schools, including the Minimum Funding Guarantee, will be cash flat (0%) on 2018/19 rather than being set at positive 0.5%. As such, this transfer does not represent an 'active cut' to primary and secondary school budgets. It represents using the small amount of growth in the Schools Block DSG settlement to support high needs provision system pressure.

1.5 All the positive growth across the DSG in 2019/20 is being allocated by the Local Authority to support high needs spending. A transfer from the Schools Block should be viewed as part of the approach, which helps to compensate for the lack of release of the damping that is the prominent feature of the High Needs Block National Funding Formula across 2019-22. A transfer is one of four cross-DSG block actions, which are proposed. The total value of these in 2019/20 is £2.93m.

1.6 The important parts of an assessment of the impact of this proposal are:

- Recognition of the connections and inter-dependencies that exist between the Schools Block and the High Needs Block. 5 key connections are set out under the summary of decision 2 (page 5). This includes recognition that a significant spending issue for the HNB is the growth in the numbers of children and young people with EHCPs in mainstream schools and academies where additional HNB spending goes back into primary and secondary schools and academies at individual school level.
- The impact on primary and secondary schools and academies of the difference, in 2019/20, between a cash flat (0%) and a positive 0.5% settlement. This is shown in Appendix 1. It is also analysed, under decision 3 (page 6), in the context of the total expenditure pressure forecasted to be felt by schools and academies in 2019/20 and in the context of the general cash flat settlement that is to be allocated across other parts of the DSG, including in early years.
- The system support provided by the HNB to the Schools Block that is proposed to remain in place in 2019/20, including the SEND Funding Floor, teaching support services and alternative provision places.
- The impact on the High Needs Block, and on the cumulative financial position of the DSG, should a transfer from the Schools Block not be enacted. The impact that 'alternative' actions to balance the HNB would have, including on the Schools Block.

2) Background – 2017/18 Transfer and National Funding Formula Protection & Damping

2.1 Prior to the DfE's consultations on national funding formula, we identified that our High Needs Block spending has historically been lower than that of other authorities, but that our Schools Block spending has been higher, as a result of our inclusion strategies. We had an expectation therefore, that national funding

formula would bring our DSG allocation more in line with the national picture, meaning that we would see a reduction in our Schools Block but also a substantial increase in our High Needs Block funding. We understood that this would require transition, as funding would need to move with pupils and the development of additional high needs places over time against the backdrop of needing to significantly expand high needs capacity to meet demographic needs growth. We argued in our consultation responses to the DfE that authorities should continue to have flexibility to move monies around the blocks in the DSG in order to manage this transition.

2.2 At April 2018, the DfE moved to a national funding formula for the allocation of DSG funding to local authorities. From analysis of the DfE's detailed modelling, published in December 2016, we identified that a substantial transfer from the Schools Block to the High Needs Block was necessary in 2017/18 to enable the creation of high needs places and to prevent a substantial and immediate High Needs Block financial problem. The Schools Forum agreed in January 2017 to transfer £5.7m from the Schools Block to the High Needs Block. This transfer placed the majority of primary and secondary schools onto the Minimum Funding Guarantee (MFG), which was set at minus 1.5% at this point. This transfer was then 'locked in' to our DSG baselines within the DfE's calculations of NFF going forward.

2.3 Recognising the size of the transfer that was made in 2017/18 the Local Authority did not propose a transfer in 2018/19.

2.4 The NFF is now doing basically what we expected it would do, by reducing in relative terms the value of our Schools Block in favour of substantially increasing the value of our High Needs Block.

2.5 The NFF outcome for our Schools Block is disappointing as it does not respond adequately to the growth in costs in schools, especially in salaries costs. However, our 2019/20 Schools Block settlement is better than what the DfE set out in its December 2016 consultation. Our allocation is c. £6.5m higher than in 2017/18, on an equivalent pupil numbers basis, as this now includes the 1% per pupil minimum increase announced by government in July 2017. Any negative impact of the NFF on the formula allocations of individual primary and secondary schools in Bradford has so far not been realised because we set an MFG at positive 0.4% in 2018/19; our schools and academies received £8.86m of MFG protection. The MFG for schools will continue in 2019/20, with the value depending on the conclusions of the discussions on a Schools Block transfer.

2.6 The NFF outcome for the High Needs Block as set out for 2019-2022 is wholly inadequate. Bradford's 2019/20 allocation should be c. £16.9m higher than the 2017/18 baseline. This increase however, is substantially reduced, capped for 2019/20 at 6.09% on 2017/18. This means that an estimated £12.4m of the £16.9m growth we estimate to receive under the NFF 'end product' is missing. We expect only £4.2m of this £12.4m to be allocated to us over 2020-22. This is because the HNB NFF formula is expected only to release a further 3% growth a year and it continues to allocate 50% of the national pot on historic spend rather than the new needs-led formula. The DfE has stated that the inclusion of the historic spend element will not be reviewed until April 2022.

2.7 It is in this context that the Authority proposes the four cross-DSG block actions set out in the introduction, including a transfer from the Schools Block. We must plan on the basis that no further HNB monies will come from the release of damping in the NFF before April 2022. In fact, the data continues to evidence increasing need in Bradford as this is updated annually, so the gap between the value of HNB funding we should receive under the final NFF 'end product' and what we actually receive will increase over 2020-2022. The NFF end product is needs-led and in itself is an indicator of the growth in need in Bradford and also of the growth in cost pressure that must be managed.

3) Context – Other Local Authorities

3.1 There is a telling paragraph within the ESFA's operational guidance for authorities for 2019/20:

"An increasing number of local authorities are now incurring a deficit on their overall DSG account, largely because of overspends on the high needs block. With effect from 2019 to 2020 the department intends to tighten up the rules under which local authorities have to explain to us their plans for bringing the DSG account back into balance. We intend to require a report from any local authority that has a DSG deficit of more than 1% as at 31 March 2019. This report will need to be discussed with the schools forum and set out the authority's plans for bringing the DSG account back into balance."

4) High Needs Block Financial Forecast Summary 2019-2022 and Assessment

4.1 It is currently forecasted that the HNB in 2018/19 will overspend by £1.27m. Added to the surplus balance brought forward from 2017/18, we estimate at this time that the HNB will hold a cumulative surplus balance in the region of £1.6m at 31 March 2019. However, a number of spending areas within this forecast are moveable. This balance is ring-fenced to support the HNB going forward.

4.2 Table 1 below summarises the High Needs Block position currently forecasted for the 2019-2022 period before the addition of the £2.9m of cross-DSG block actions. The estimated nature of this forecast must be stressed. Changes in growth rates in some specific areas, including places creation, mainstream EHCPs, post 16 and out of authority / independent placements may alter the forecasts as these are larger budgets. This being said, the forecast is at the very least a reasonable representation of the size of the minimum cost pressure we expect to manage. The table evidences that this pressure cannot be met solely by HNB DSG income – the expenditure growth rate is higher than NFF income growth rate.

Table 1

| | 2019/20 | 2020/21 | 2021/22 |
|--|------------------|------------------|------------------|
| HNB DSG Income | 68,331,042 | 70,666,214 | 72,604,120 |
| <i>Income growth on the previous year</i> | <i>2,453,967</i> | <i>2,335,172</i> | <i>1,937,906</i> |
| HNB Expenditure | 72,303,589 | 76,814,884 | 81,764,552 |
| <i>Expenditure growth on the previous year</i> | <i>5,184,411</i> | <i>4,511,296</i> | <i>4,949,668</i> |
| HNB In Year Budget Position (negative = deficit) | -3,972,547 | -6,148,670 | -9,160,432 |
| HNB Balance Brought Forward (negative = deficit) | 1,617,110 | -2,355,437 | -8,504,108 |
| HNB Balance Carried Forward (negative = deficit) | -2,355,437 | -8,504,108 | -17,664,539 |

4.3 95% of the £72.3m expenditure in 2019/20 is on places / delegated high needs provision. The remaining 5% is expenditure on centrally managed support, including medical home tuition and teaching support services.

4.4 This forecast includes financial provision for the 491 additional places that were agreed to be created with the Schools Forum in January 2017 (with an estimated total full year cost of £10.5m). It includes the 72 places associated with a new SEMH free school. 390 of these 491 places are funded at April 2019. Within this forecast, the SEMH free school opens at September 2020.

4.5 In addition to the £10.5m cost of developing places capacity, there are 3 main areas where spending is forecasted to continue to increase substantially across the 2019-22 period: Out of authority / independent placements, Mainstream EHCPs and Post 16 provision (further education). The table below shows this actual / estimated cost increase (the % in brackets is % increase on the previous year).

Table 2

| | OLA / Independent Placements | Mainstream EHCPs | Post 16 Provision |
|--------------------|------------------------------|------------------|-------------------|
| 2015/16 | £4.78m | £3.35m | Not available |
| 2016/17 | £ 5.65m (18.2%) | £4.02m (20.0%) | £3.20m |
| 2017/18 | £6.75m (19.5%) | £4.97m (23.6%) | £3.58m (11.9%) |
| 2018/19 forecasted | £8.15m (20.7%) | £5.97m (20.1%) | £4.40m (23.0%) |
| 2019/20 forecasted | £9.81m (20.3%) | £7.28m (21.9%) | £5.12m (16.4%) |
| 2020/21 forecasted | £11.08m (12.9%) | £8.74m (20.0%) | £5.52m (7.8%) |
| 2021/22 forecasted | £12.73m (14.9%) | £10.40m (19.0%) | £5.92m (7.3%) |

4.6 The growth in these 3 areas explains £3.7m of the £5.18m (70%) of total expenditure growth forecasted in 2019/20. This spending growth is the result of demographic and SEND trends; there are 3,530 children and young people with EHCPs in Bradford in 2018/19 compared with 2,225 in 2014/15. The growth in out of authority / independent placements spending evidences that, despite our growth, we do not have sufficient specialist places in Bradford. The Authority is currently re-assessing our requirement for additional specialist places, with a view to seeking to substantially reduce the growth rate of out of authority and independent placements in favour of Bradford-located provision. However, this does not mean that additional spending on places will reduce. We are in fact concerned that our current financial forecast under estimates the cost of the number of additional specialist places that are required to be created going forward. The Authority is working to clarify our estimates as a priority.

4.7 In this context, the £2.9m of cross-DSG block movement is proposed to offset most but not all of the anticipated £3.97m in year over-spending in the High Needs Block in 2019/20 so that the HNB is not cumulatively in deficit at the end of 2019/20. However, this £2.9m, where repeated in future years, will not be sufficient to balance the HNB going forward and there is significant risk of deficit.

4.8 In this context, the Local Authority is currently re-assessing our HNB financial and provision strategy and will continue to discuss this regularly with the Schools Forum and its Steering Group. The Authority will need to discuss with the Schools Forum what further actions should / can be taken to avoid the accrual of a significant deficit. The Authority will need to bring this discussion forward with urgency should a transfer from the Schools Block to the High Needs Block not be approved for 2019/20.

Appendix 4 – Technical Annex

This appendix contains more technical detail on the definitions and calculations of factors that are contained within Bradford Council's primary & secondary school funding model.

Notional SEND (Mainstream Schools Block Primary & Secondary)

Local authorities are 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). Our calculation has built up over time. How Bradford currently defines notional SEND (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% |

In addition, 6% of a school's allocation under the Early Years Single Funding Formula, for schools and academies that have nursery provision, is also defined to be available for supporting SEND in early years.

SEND Funding Floor (Mainstream Primary & Secondary)

The SEND Floor provides a 'top up' where the SEND 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. SEND formula funding is defined as the notional SEND in the table above but does not include the 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 values of SEND Floor allocations for individual primary and secondary schools and academies are currently protected at 2017/18 cash levels i.e. schools and academies in 2018/19 received at least the value of allocation they have received in 2017/18.

Split Sites (Mainstream Primary & Secondary)

Our split sites factor operates as follows:

a) The criteria used to define a split site are as follows:

- *Essential* - two or more distinctly separate campuses where there is no single continuous boundary and where the campuses are split by a through road.
- Additional criteria (for weighting of funding):

Category A - where it is impossible not to move a proportion (either 25% or 50%) of total school / academy pupils between the campuses within the school day

Category B - where the campuses are more than 400 metres apart

b) The criteria used to allocate funding to a school / academy operating across a split site based on the categories defined above, are as follows:

| Category | Primary Lump | Primary APP | Secondary Lump | Secondary APP |
|------------------|---------------------|--------------------|-----------------------|----------------------|
| <i>Essential</i> | £8,514.75 | 0.00 | £9,782.62 | 0 |
| <i>A</i> | 0 | £107.73 | 0 | £113.67 |
| <i>B</i> | £18,426.01 | £9.15 | £20,558.87 | £12.78 |

- Split sites funding is paid to all schools and academies that meet the above criteria.
- Federated schools are not eligible for split sites funding.
- Where 2 schools have amalgamated and the new school is operating across a split site, the school will not be eligible for split sites funding whilst it is in receipt of the additional lump sum (in the year immediately after amalgamation).
- Funding is only applicable for Reception to Year 11 mainstream provision.
- We would not expect split sites funding to apply to co-located or offsite behaviour centres.

PFI (Building Schools For the Future)

Our Private Finance Initiative (PFI) / BSF formula factor (mainstream secondary) simply apportions the DSG's contribution to the affordability gap of the Building Schools for the Future (BSF) programme across applicable secondary schools / academies.

The formula for splitting the total contribution between BSF schools / academies is as follows: (Total affordability gap to be funded by the DSG / Total cost of school unitary charges) x Individual school's unitary charge as a % of the total unitary charge.

Other Technical Matters

The following aspects of the current mainstream primary and secondary formula funding framework remain in place in 2019/20:

- DSG sourced formula funding allocations for primary (reception to year 6) and secondary (pre 16) will be calculated on the October (2018) Census.
- Unlike formula funding, the Pupil Premium Grant is allocated on January (2019) Census pupil numbers.
- Local authorities must allocate at least 80% of the delegated schools block funding through the pupil-led factors, which include the base amount per pupil, deprivation, low prior attainment, English as an additional language, pupil mobility and looked after children factors. We allocated 91.8% of the delegated schools block funding via the pupil-led factors in 2018/19, and the modelling included in this consultation indicates that we continue at least at this % in 2019/20.
- The Minimum Funding Guarantee (MFG) continues to be the only protection mechanism available for individual primary and secondary school and academy allocations.
- The existing framework for the funding of High Needs pupils continues. A High Needs pupil is still defined, for financial purposes, as one whose education costs more than £10,000 per year. The first elements of funding for High Needs pupils continue to be already delegated within budget shares. A top up is then allocated separately, on a monthly basis, for the cost of additional support above the £6,000 threshold. This is set out in more detail on our consultation on high needs funding.
- Allocations for academies and free schools will continue to be paid directly by the Education & Skills Funding Agency (ESFA). The ESFA will use the pro-forma submitted by the Authority in January each year to calculate individual allocations.

Appendix 5: Purposes of Schools Block De-Delegated Funds Retained in 2018/19

1. FSM Eligibility Assessments:

This fund covers the work the Local Authority's Benefits Team does in relation to Free School Meals eligibility for pupils in maintained primary and secondary schools. It covers staffing and ICT costs associated with:

- The processing of all applications for FSM for all maintained schools
- Checking & verifying claims, notifying parents of successful and unsuccessful claims
- Notifying schools of successful claims and changes to existing claims
- Assisting schools with eligibility, take up and administrative issues & providing guidance
- Promoting maximum take up of FSM eligibility, including cross checking pupil FSM data with other Authority benefits systems

The Local Authority makes use of a nationwide FSM checking system, which means that paper evidence does not have to be supplied by parents. Applications for all children who attend Bradford schools can be processed quickly via the Council's website, telephone, personal visit or in writing. Currently, schools do not have direct access to this checking system.

If this de-delegated fund is not held in 2019/20, schools will either need to undertake FSM assessment themselves or purchase services. The Local Authority offers a traded service to academies.

2. Fischer Family Trust – Primary School Licences:

This fund pays for maintained primary schools' subscriptions to Fischer Family Trust (FFT). FFT provides a unique service to schools and the local authorities. This services analyses previous national end of key stage data and the contextual data of schools and uses this to provide estimates of outcomes at pupil level for the next key stage result. These pupil level results are aggregated at school and at local authority level. Over time these estimates have come to be held in high regard and the work of the FFT is valued by schools and local authorities. Government funding for the FFT was withdrawn at March 2012. As a consequence, the FFT restructured their pricing and data access policies. The purchasing of the data through the Local Authority offers significant savings.

De-delegation for this purpose ceased from the secondary phase at 31 March 2017.

If this de-delegated fund is not held in 2019/20, maintained primary schools will need to purchase their own licences to access FFT data, on an individual basis or as a cluster of schools. Please be aware that due to the timescale necessary for confirmation, the Schools Forum has already decided to continue de-delegation in 2019/20 from maintained primary schools for the purposes of subscribing to Fischer Family Trust.

3. Primary School Maternity / Paternity 'insurance':

This fund has historically acted as an 'insurance' pot, where maintained primary schools are reimbursed for the costs of the salaries of staff on maternity / paternity leave, so that the cost of cover / supply arrangements can be afforded from the school's budget. The Schools Forum has discussed the delegation of this pot to schools on a number of occasions over the last ten years or so, and has always concluded that the protection this centrally managed fund offers, especially to smaller schools, against the disproportionate and unpredictable nature of maternity / costs is vital.

De-delegation for this purpose ceased from the secondary phase during 2017/18.

If this de-delegated fund is not held in 2019/20, maintained primary schools will not be reimbursed for the salary cost of staff on maternity / paternity leave and would have to make alternative arrangements to manage this cost, for example, by including maternity cover within the school's supply insurance arrangements or by working in clusters to share the cost of staffing cover.

Colleagues in maintained primary schools will be aware of the warnings that have been given previously about the viability of current arrangements for supporting maternity / paternity costs. We have warned, as happened in the secondary sector, that we may be moving towards the position where existing arrangements are no longer financially efficient or viable. This is due to the growth in cost at the same time as a reducing number of maintained schools. The maternity / paternity scheme will remain in place for 2019/20, subject to agreement through this consultation. However, the continuation of this from April 2020 will be reviewed. Schools will be given warning where a decision is taken to cease this fund and we will discuss with the Schools Forum how schools can be given sufficient time to respond.

4. Trade Union Facilities Time & Health and Safety Facilities Time:

There is a legal obligation (under The Trade Union and Labour Relations (Consolidation) Act 1992) for an employer to provide facilities for recognised trade unions to function within the workplace, including an obligation to grant time off with pay. The recognised unions in schools are:

- Teacher Trade Unions - NUT, NASUWT, ATL, ASCL, NAHT, VOICE, and
- The Trade Unions representing support and other professional school staff – UNISON, GMB and UNITE

To meet this obligation, Bradford Council has agreed to release a number of staff for part or all of their time from their school duties to carry out their duties as elected lay officials. This applies to the recognised trade unions in schools with significant memberships. Historically the agreed ratio for facility time has been 1 day per 400 members, which has been used as a mutually acceptable, in principle, starting point for the joint management and trade union discussions. Current facility time arrangements with respect to school employees provide a total of 7.3 FTE as follows:

- NUT has 2.1 FTE lay officials (10.5 days per week)
- NASUWT has 1.8 FTE lay officials (9 days per week)
- ATL has 1 FTE lay official (5 days per week)
- NAHT has 0.4 FTE lay official (2 days per week)
- UNISON has 1.3 FTE lay officials (6.5 days per week)
- GMB has 0.6 FTE lay officials (3 days per week)
- ASCL has 0.1 FTE lay official (1 day a fortnight)

If this de-delegated fund is not held in 2019/20, individual maintained primary and secondary schools will need to consider how they will meet their statutory obligations to allow trade unions to represent and consult with their members and with the school as the employer, as local branch trade union representatives would no longer be available without cost. For example, each trade union has the right to appoint a trade union representative within a school to carry out statutory functions, and seek time off for these representatives to be trained to carry out these duties.

In order to comply with the letter and the spirit of the Health and Safety Regulations, Bradford Council and the Trade Union Health and Safety Lay Representatives in Bradford made a Health and Safety Agreement in 1989. Nominated accredited Trade Union and lay Health and Safety representatives continue to carry out Health and Safety inspections in schools, with the aim being to inspect each school once a year, and are released for all or part of their time from their school responsibilities to carry out these duties. Safety Representatives also carry out site management visits in relation to building work and work with the Council's Health and Well Being Team on occupational matters and undertake the role of investigating accidents, disease and other medical matters. A total of 6 days per week (1.2 FTE) of facilities time is currently funded within the DSG for these purposes.

If this de-delegated fund is not held in 2019/20, individual maintained primary and secondary schools will need to consider how they will meet their employer statutory obligations around health and safety.

The Schools Forum has recently considered ([14 March 2018](#)) a detailed assessment of the Authority's current Trade Union Facilities Time arrangements, and has concluded that these arrangements are effective and continue to offer value for money.

5. School Staff Public Duties and Suspensions Fund:

This fund has historically acted, on a similar basis to maternity / paternity payments, as an 'insurance' type pot for maintained primary schools to be reimbursed for staffing costs associated with public duties (magistrates / court duties) and, more significantly, where an employee is suspended from duty following a Child Protection allegation and where the Police are undertaking an investigation. In the case of suspensions, schools are reimbursed for 50% of the cost of the salary of the member of staff suspended.

De-delegation for this purpose ceased from the secondary phase at 31 March 2017.

If this de-delegated fund is not held in 2019/20, maintained primary schools will not be reimbursed for the salary cost of staff and would have to make alternative arrangements to manage this cost.

6. School Re-Organisation Costs:

This fund serves 2 purposes and the proposed criteria for allocating funding in 2019/20 are unchanged from 2018/19:

- School staff safeguarded salaries: funding is allocated based on the actual cost of agreed safeguards for individual staff in primary and secondary schools. Only safeguards that have been previously agreed are funded from the DSG. So there is no 'eligibility' criteria as such, other than these safeguards must have been already established and agreed with the Authority following re-organisations. Every year, schools are asked to confirm whether or not safeguards for individual staff are still applicable e.g. where a member of staff has left, the safeguard ceases to be paid. The total cost of safeguards reduces year on year.
- Deficit of Closing Schools: where a maintained primary school closes with a deficit budget, or where a maintained primary school with a deficit budget converts to academy status under a sponsored agreement, the deficit returns to the Authority. The de-delegated fund is established to meet the cost of this from the DSG. Please note that there is no de-delegation from the secondary phase for this purpose.

If this de-delegated fund is not held in 2019/20, maintained primary schools will not be reimbursed for the additional salary cost of staff placed through re-organisation and the Authority would need to discuss with the Schools Forum how any deficits of maintained primary schools, that are not repaid by the school incurring the deficit, are alternatively managed.

7. Exceptional Costs & Schools in Financial Difficulty:

This fund is in place for maintained primary schools to enable additional financial support to be provided, in a transparent and controlled way, to specific schools that may face difficult circumstances and unreasonable cost pressures and also to support schools that require immediate intervention around standards that may not be able to identify funds from their own budgets.

De-delegation for this purpose ceased from the secondary phase at 31 March 2017.

The purpose of this fund is to provide support for the budgets of maintained primary schools in the following circumstances:

- Exceptional growth in pupil numbers not picked up within the terms of the Growth Fund.
- 1 Form of Entry (or smaller) primary schools, where the cost of external HR investigations places the school in financial difficulty i.e. would reduce the forecasted carry forward balance below £20,000 *
- Priority 3 or 4 schools, where additional intervention / support is required and where the school's budget cannot meet the costs without placing the school in financial difficulty i.e. would reduce the forecasted carry forward balance below £20,000 *
- Local Authority statutory interventions e.g. cost of an IEB

- Any other circumstance, where the exceptional nature of this is agreed by the Schools Forum and where to not provide financial support would place the school in a financially difficult position that it is likely to have a detrimental impact on outcomes for children. *

* £20,000 is a reasonable safety net to apply for all schools i.e. a school with £20,000 holds adequate reserve to meet small value additional unexpected costs.

The financial impact of exceptional in year pupil numbers growth is the most common reason for schools requesting exceptional funding. The criteria for allocating funding in such circumstances in 2019/20 are unchanged from 2018/19 and are as follows:

- The main factor taken into account is the extent of additional cost pressure faced by a school. This is assessed on the information provided by the school on what action has been needed to meet a growth in pupil numbers.
- The extent of increase in numbers: actual numbers and % of roll (vs. the phase average).
- Whether the Local Authority has directed the additional pupils to the school.
- How the additional pupils are distributed across the school.
- Whether this is a one off issue i.e. the potential extent for exceptional growth and further cost pressure in future years.
- In judging exceptional funding for children admitted on appeal, what the specific circumstances are at the school which require the school to make additional provision in the first year.
- The school's carry forward balances position.
- The change in the school's expenditure shown in the Start Budget vs. Q1 vs. Q2 vs. Q3 monitoring reports.
- The Priority category of the School (is the school in Priority 3 or 4?)
- Whether the school has received financial support or funding from elsewhere.

We have set out in paragraph 7 of this document a proposal for the establishment of a Falling Rolls Fund. We also ask schools to consider whether we should enable the SIFD / exceptional costs de-delegated fund to allocate funding to maintained primary schools facing falling rolls and / or that are under-subscribed. Subject to the outcomes of this consultation, the criteria for the allocation of SIFD / exceptional costs funding may be amended in 2019/20.

2018/19 Schools Block De-Delegated Funds: Values

The table below shows the total values that were de-delegated from individual school budgets in the current financial year (before reductions have been made following the conversion of maintained schools to academy status during the year).

| Fund | Primary £ | Secondary £ | Total Value £ |
|---|----------------------|------------------------|--------------------------|
| School Behaviour Support Team | £128,022 | n/a | £128,022 |
| FSM Eligibility Assessments | £54,736 | £14,220 | £68,956 |
| Fischer Family Trust – School Licences | £21,600 | n/a | £21,600 |
| School Maternity / Paternity 'insurance' | £1,461,135 | n/a | £1,461,135 |
| Trade Union Facilities Time | £154,015 | £38,797 | £192,812 |
| Trade Union Health and Safety Rep Time | £23,535 | £5,929 | £29,464 |
| School Staff Public Duties & Suspensions Fund | £31,380 | n/a | £31,380 |
| School Re-Organisation Costs – Safeguarded salaries | £46,253 | £3,071 | £49,324 |
| School Re-Organisation Costs – Deficit Budgets | £132,234 | n/a | £132,234 |
| Exceptional Costs & SIFD | £88,000 | n/a | £88,000 |
| Totals | £2,140,910 | £62,016 | £2,202,926 |

These total values were de-delegated from 2018/19 individual maintained school budgets on a flat amount per pupil basis, with the exception of FSM Eligibility Assessments, which has been de-delegated on an amount per Ever 6 FSM formula pupil, as follows:

| Fund | Primary £app | Secondary £app |
|---|-------------------------|---------------------------|
| School Behaviour Support Team | £3.79 | n/a |
| FSM Eligibility Assessments (per FSM) | £5.80 | £5.14 |
| Fischer Family Trust – School Licences | £0.64 | n/a |
| School Maternity / Paternity 'insurance' | £43.28 | n/a |
| Trade Union Facilities Time | £4.56 | £4.56 |
| Trade Union Health and Safety Rep Time | £0.70 | £0.70 |
| School Staff Public Duties & Suspensions Fund | £0.93 | n/a |
| School Re-Organisation Costs – Safeguarded salaries | £1.37 | £0.36 |
| School Re-Organisation Costs – Deficit Budgets | £3.92 | n/a |
| Exceptional Costs & SIFD | £2.61 | n/a |
| Total Per Pupil | £61.80 | £5.62 |
| Total Per FSM (Ever 6) | £5.80 | £5.14 |

Each maintained school has contributed from its 2018/19 delegated budget share the amount per pupil (£app) shown above multiplied by its number of reception to year 11 pupils, or by its number of Ever 6 FSM formula pupils for FSM Eligibility Assessments.

APPENDIX 6: RESPONSES FORM

**CONSULTATION & INFORMATION ON PRIMARY & SECONDARY FUNDING
FORMULAE 2019/20 FINANCIAL YEAR**

Name _____ School / Academy _____

Please choose your phase below:

PRIMARY SECONDARY

THE DEADLINE FOR RESPONSES TO THIS CONSULTATION IS FRIDAY 30 NOVEMBER 2018

Please send completed questionnaire responses to:

School Funding Team (FAO Andrew Redding)
City of Bradford Metropolitan District Council
Britannia House (1st Floor)
Hall Ings
Bradford
BD1 1HX

Tel: 01274 432678
Fax: 01274 435054
Email: andrew.redding@bradford.gov.uk

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

Question 1 - Do you agree with the proposal to continue to mirror the DfE's NFF to calculate primary and secondary school and academy formula funding allocations in 2019/20, incorporating the amendments to the primary-phase low prior attainment variable value and to the calculation of the MFLs? If not, please explain the reasons why not.

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

If not, please provide further explanation here:

Question 2 - Do you agree with the proposal to transfer £2.0m from the Schools Block to the High Needs Block in 2019/20? If not, please explain the reasons why not.

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

If not, please provide further explanation here:

Question 3 - Do you agree with the proposal to set the Minimum Funding Guarantee at 0% in 2019/20? If not, please explain the reasons why not.

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

If not, please provide further explanation here:

Question 4 - Do you agree with the proposal to retain the NFF variables cash flat (0%) on 2018/19 in line with a 0% MFG? If not, please explain the reasons why not.

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

If not, please provide further explanation here:

Question 5 - Do you agree with the proposal not to implement the optional 1% increase per pupil on 201718 NFF baseline factor? If not, please explain the reasons why not.

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

If not, please provide further explanation here:

Question 6 - Do you agree with the proposal not to apply a ceiling in 2019/20? If not, please explain the reasons why not.

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

If not, please provide further explanation here:

Question 7a - Do you agree with the proposal to continue to use our existing formulae for the allocation of split sites and pupil mobility funding? If not, please explain the reasons why not.

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

If not, please provide further explanation here:

Question 7b - Do you agree with the proposal to continue to use our existing formula for the apportionment of BSF DSG affordability gap funding? If not, please explain the reasons why not.

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

If not, please provide further explanation here:

Question 7c - Do you agree with the proposal to continue to use our existing methodology for the definition of notional SEND budgets? If not, please explain the reasons why not.

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

If not, please provide further explanation here:

Question 7d - Do you agree with the proposal to continue to protect SEND Funding Floor allocations at 2017/18 cash values pending review for April 2020? If not, please explain the reasons why not.

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

If not, please provide further explanation here:

Question 8 - Do you agree with the proposed criteria and methodology for the allocation of the Growth Fund to schools and academies in 2019/20? If not, please explain the reasons why not.

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

If not, please provide further explanation here:

Question 9a - Do you agree with the proposal in outline to establish a Falling Rolls Fund within the Schools Block for the primary-phase in 2019/20? If not, please explain the reasons why not.

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

If not, please provide further explanation here:

Question 9b - Do you agree with the proposed scope and eligibility triggers for the Falling Rolls Fund? If not, please explain the reasons why not.

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

If not, please provide further explanation here:

Question 9c – Would you agree to the use of de-delegated funding to support maintained primary schools only (but not primary academies) that are facing falling rolls and / or under-subscription that are not eligible for the Falling Rolls Fund due to their latest Ofsted judgement?

Strongly Agree On Balance Agree (some reservations) Strongly Disagree

If not, please provide further explanation here:

Question 10 – Should sums continue or cease to be de-delegated from maintained school budgets in 2019/20 for the purposes listed above? Please explain the reasons why if you believe that these should cease or change.

| | <i>YES - de-delegate</i> | <i>NO</i> |
|--|--------------------------|--------------------------|
| FSM Eligibility Assessments | <input type="checkbox"/> | <input type="checkbox"/> |
| Fischer Family Trust – School Licences | <input type="checkbox"/> | <input type="checkbox"/> |
| School Maternity / Paternity ‘insurance’ | <input type="checkbox"/> | <input type="checkbox"/> |
| Trade Union Facilities Time | <input type="checkbox"/> | <input type="checkbox"/> |
| Trade Union Health and Safety Rep Time | <input type="checkbox"/> | <input type="checkbox"/> |
| School Staff Public Duties and Suspensions Fund | <input type="checkbox"/> | <input type="checkbox"/> |

Please provide any additional comments here:

Please use the space below to record any further comments you would like to make on the proposals, which you have not included in your other responses.

Please send completed questionnaire responses to Andrew Redding by Friday 30 November 2018:

- *E-mail:* andrew.redding@bradford.gov.uk
- *Fax:* 01274 435054
- *Post:* **School Funding Team (FAO Andrew Redding)
City of Bradford Metropolitan District Council
Britannia House (1st Floor)
Hall Ings
Bradford
BD1 1HX**

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| | | 2018/19 Financial Year (Actual) | | | | | | 2019/20 Financial Year (Illustrative Model Based on Same Pupil No.s and 0%) | | | | | | | | | |
|----------------------------------|--|---------------------------------|---|------------|-------------------------------|------------------------|---------------------------|---|---|----------|-------------------------------|--------------------------|---|--------------------|----------------|-------------------|--------------------------------------|
| Column Reference (see key below) | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| Phase | School | Funded Pupil No.s | Total Formula Funding (ex. Rates & BSF) | MFG (0.4%) | MFL (£3,500 prim; £4,800 sec) | Ceiling Reduction (3%) | SEND Funding Floor (Sept) | Funded Pupil No.s | Total Formula Funding (ex. Rates & BSF) | MFG (0%) | MFL (£3,500 prim; £4,800 sec) | Ceiling Reduction (none) | Clean Impact Prior Low Attainment NFF change (prim) | SEND Funding Floor | £ Diff to 0.5% | £APP Diff to 0.5% | Diff between 0.5% MFG & 1% NFF Floor |
| All Through | Appleton Academy | 1,220 | 6,042,818 | 50,768 | 0 | 0 | 0 | 1,220 | 6,042,818 | 54,095 | 0 | 0 | -3,327 | 0 | 29,661 | 24 | 582 |
| All Through | Bradford Academy | 1,573 | 8,135,112 | 0 | 0 | 0 | 0 | 1,573 | 8,135,112 | 5,241 | 0 | 0 | -5,241 | 0 | 40,123 | 26 | 0 |
| All Through | Bradford Girls Grammar (Free School) | 948 | 4,311,413 | 67,008 | 0 | 0 | 0 | 948 | 4,311,413 | 70,429 | 0 | 0 | -3,421 | 0 | 21,004 | 22 | 418 |
| All Through | Dixons Allerton Academy | 1,514 | 7,850,508 | 159,014 | 0 | 0 | 0 | 1,574 | 8,095,345 | 186,731 | 0 | 0 | 17,477 | 0 | 39,591 | 25 | 0 |
| Primary | Addingham Primary School | 222 | 837,091 | 60,091 | 2,986 | 0 | 10,453 | 222 | 837,091 | 60,091 | 4,133 | 0 | -1,146 | 10,453 | 3,633 | 16 | 383 |
| Primary | All Saints' CE Primary School (Bradford) | 619 | 2,658,645 | 0 | 0 | 0 | 0 | 619 | 2,658,645 | 8,238 | 0 | 0 | -8,238 | 0 | 12,740 | 21 | 0 |
| Primary | All Saints' CE Primary School (Ilkley) | 312 | 1,097,377 | 5,377 | 54,800 | 0 | 29,377 | 312 | 1,097,377 | 5,377 | 56,244 | 0 | -1,443 | 29,377 | 4,934 | 16 | 505 |
| Primary | Ashlands Primary School | 420 | 1,470,000 | 0 | 64,263 | 0 | 17,936 | 420 | 1,470,000 | 0 | 66,891 | 0 | -2,628 | 17,936 | 6,797 | 16 | 0 |
| Primary | Atlas School | 207 | 990,891 | 48,547 | 0 | 0 | 0 | 207 | 990,891 | 50,964 | 0 | 0 | -2,417 | 0 | 4,402 | 21 | 554 |
| Primary | Baildon CE Primary School | 412 | 1,444,940 | 2,940 | 81,347 | 0 | 8,097 | 412 | 1,444,940 | 2,940 | 83,666 | 0 | -2,319 | 8,097 | 6,672 | 16 | 697 |
| Primary | Bankfoot Primary School | 244 | 1,089,309 | 75,897 | 0 | 0 | 0 | 244 | 1,089,309 | 77,767 | 0 | 0 | -1,870 | 0 | 4,894 | 20 | 596 |
| Primary | Barkerend Primary Leadership Academy | 424 | 1,877,737 | 33,755 | 0 | 0 | 0 | 424 | 1,877,737 | 39,320 | 0 | 0 | -5,564 | 0 | 8,836 | 21 | 1,102 |
| Primary | Beckfoot Allerton Primary Academy | 417 | 1,715,301 | 115,347 | 0 | 0 | 0 | 417 | 1,715,301 | 118,275 | 0 | 0 | -2,928 | 0 | 8,024 | 19 | 953 |
| Primary | Beckfoot Heaton Primary Academy | 636 | 2,655,358 | 1,393 | 0 | 0 | 0 | 636 | 2,655,358 | 9,246 | 0 | 0 | -7,852 | 0 | 12,724 | 20 | 1,550 |
| Primary | Beckfoot Priestthorpe Primary School | 194 | 807,109 | 52,951 | 0 | 0 | 3,966 | 194 | 807,109 | 54,377 | 0 | 0 | -1,427 | 3,966 | 3,483 | 18 | 395 |
| Primary | Ben Rhydding Primary School | 212 | 797,124 | 48,850 | 0 | 0 | 15,080 | 212 | 797,124 | 50,100 | 0 | 0 | -1,250 | 15,080 | 3,433 | 16 | 358 |
| Primary | Blakehill Primary School | 417 | 1,527,786 | 22,700 | 0 | 0 | 0 | 417 | 1,527,786 | 26,271 | 0 | 0 | -3,571 | 0 | 7,086 | 17 | 768 |
| Primary | Bowling Park Primary School | 618 | 2,763,851 | 0 | 0 | 0 | 0 | 618 | 2,763,851 | 8,993 | 0 | 0 | -8,990 | 0 | 13,266 | 21 | 0 |
| Primary | Brackenhill Primary School | 413 | 1,800,647 | 34,653 | 0 | 0 | 0 | 413 | 1,800,647 | 40,286 | 0 | 0 | -5,632 | 0 | 8,450 | 20 | 1,042 |
| Primary | Burley & Woodhead CE Primary School | 216 | 808,799 | 52,799 | 8,572 | 0 | 8,013 | 216 | 808,799 | 52,799 | 9,608 | 0 | -1,036 | 8,013 | 3,491 | 16 | 363 |
| Primary | Burley Oaks Primary School | 430 | 1,505,000 | 0 | 96,730 | 0 | 226 | 430 | 1,505,000 | 0 | 99,220 | 0 | -2,490 | 226 | 6,972 | 16 | 0 |
| Primary | Byron Primary Academy | 621 | 2,619,854 | 71,741 | 0 | 0 | 0 | 621 | 2,619,854 | 79,143 | 0 | 0 | -7,402 | 0 | 12,546 | 20 | 1,527 |
| Primary | Carrwood Primary School | 333 | 1,694,149 | 121,120 | 0 | 0 | 0 | 333 | 1,694,149 | 125,496 | 0 | 0 | -4,376 | 0 | 7,918 | 24 | 6,277 |
| Primary | Cavendish Primary School | 431 | 1,828,624 | 0 | 0 | 0 | 0 | 431 | 1,828,624 | 5,415 | 0 | 0 | -5,415 | 0 | 8,590 | 20 | 0 |
| Primary | Christ Church Primary Academy | 193 | 945,425 | 67,873 | 0 | 0 | 0 | 193 | 945,425 | 69,648 | 0 | 0 | -1,775 | 0 | 4,174 | 22 | 1,177 |
| Primary | Clayton St John's CE Primary Academy | 408 | 1,515,766 | 30,297 | 0 | 0 | 0 | 408 | 1,515,766 | 33,068 | 0 | 0 | -2,771 | 0 | 7,026 | 17 | 772 |
| Primary | Clayton Village Primary School | 202 | 911,535 | 67,214 | 0 | 0 | 0 | 202 | 911,535 | 69,293 | 0 | 0 | -2,079 | 0 | 4,005 | 20 | 484 |
| Primary | Copthorne Primary | 429 | 1,808,215 | 0 | 0 | -22,032 | 0 | 429 | 1,823,869 | 0 | 0 | 0 | -6,378 | 0 | 9,119 | 21 | 0 |
| Primary | Cottingley Village Primary School | 423 | 1,558,761 | 78,261 | 384 | 0 | 1,202 | 423 | 1,558,761 | 78,261 | 2,751 | 0 | -2,367 | 1,202 | 7,241 | 17 | 792 |
| Primary | Crossflatts Primary School | 423 | 1,480,500 | 0 | 36,356 | 0 | 1,041 | 423 | 1,480,500 | 0 | 39,435 | 0 | -3,079 | 1,041 | 6,850 | 16 | 0 |
| Primary | Crossley Hall Primary School | 606 | 2,525,623 | 0 | 0 | -152 | 0 | 606 | 2,525,623 | 7,798 | 0 | 0 | -7,949 | 0 | 12,075 | 20 | 0 |
| Primary | Cullingworth Village Primary School | 276 | 1,051,639 | 45,130 | 0 | 0 | 12,868 | 276 | 1,051,639 | 47,165 | 0 | 0 | -2,036 | 12,868 | 4,705 | 17 | 514 |
| Primary | Denholme Primary | 204 | 869,824 | 44,054 | 0 | 0 | 522 | 204 | 869,824 | 46,119 | 0 | 0 | -2,065 | 522 | 3,796 | 19 | 0 |
| Primary | Dixons Manningham Primary Academy | 364 | 1,619,141 | 7,860 | 0 | 0 | 0 | 364 | 1,619,141 | 13,142 | 0 | 0 | -5,282 | 0 | 7,543 | 21 | 938 |
| Primary | Dixons Marchbank Academy | 418 | 1,891,749 | 90,833 | 0 | 0 | 0 | 418 | 1,891,749 | 96,333 | 0 | 0 | -5,500 | 0 | 8,906 | 21 | 1,125 |
| Primary | Dixons Music Primary | 364 | 1,474,937 | 107,209 | 0 | 0 | 0 | 364 | 1,474,937 | 109,851 | 0 | 0 | -2,643 | 0 | 6,822 | 19 | 0 |
| Primary | East Morton CE Primary Academy | 209 | 798,963 | 51,069 | 0 | 0 | 14,326 | 209 | 798,963 | 52,236 | 0 | 0 | -1,167 | 14,326 | 3,442 | 16 | 365 |
| Primary | Eastburn Junior and Infant School | 203 | 792,036 | 36,583 | 0 | 0 | 25,030 | 203 | 792,036 | 38,347 | 0 | 0 | -1,764 | 25,030 | 3,407 | 17 | 367 |
| Primary | Eastwood Primary School | 408 | 1,757,179 | 44,746 | 0 | 0 | 0 | 408 | 1,757,179 | 49,341 | 0 | 0 | -4,595 | 0 | 8,233 | 20 | 1,008 |
| Primary | Eldwick Primary School | 484 | 1,694,000 | 0 | 86,760 | 0 | 2,744 | 484 | 1,694,000 | 0 | 90,125 | 0 | -3,366 | 2,744 | 7,917 | 16 | 0 |
| Primary | Fagley Primary School | 215 | 1,059,917 | 34,070 | 0 | 0 | 0 | 215 | 1,059,917 | 37,114 | 0 | 0 | -3,044 | 0 | 4,747 | 22 | 8,979 |
| Primary | Farfield Primary | 413 | 1,860,789 | 34,565 | 0 | 0 | 0 | 413 | 1,860,789 | 40,798 | 0 | 0 | -6,233 | 0 | 8,751 | 21 | 5,363 |

| | | 2018/19 Financial Year (Actual) | | | | | | 2019/20 Financial Year (Illustrative Model Based on Same Pupil No.s and 0%) | | | | | | | | | |
|----------------------------------|--|---------------------------------|---|------------|-------------------------------|------------------------|---------------------------|---|---|----------|-------------------------------|--------------------------|---|--------------------|----------------|-------------------|--------------------------------------|
| Column Reference (see key below) | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| Phase | School | Funded Pupil No.s | Total Formula Funding (ex. Rates & BSF) | MFG (0.4%) | MFL (£3,500 prim; £4,800 sec) | Ceiling Reduction (3%) | SEND Funding Floor (Sept) | Funded Pupil No.s | Total Formula Funding (ex. Rates & BSF) | MFG (0%) | MFL (£3,500 prim; £4,800 sec) | Ceiling Reduction (none) | Clean Impact Prior Low Attainment NFF change (prim) | SEND Funding Floor | £ Diff to 0.5% | £APP Diff to 0.5% | Diff between 0.5% MFG & 1% NFF Floor |
| Primary | Farnham Primary Academy | 425 | 1,830,132 | 0 | 0 | 0 | 0 | 425 | 1,830,132 | 5,620 | 0 | 0 | -5,620 | 0 | 8,598 | 20 | 0 |
| Primary | Fearnville Primary School | 341 | 1,631,070 | 71,146 | 0 | 0 | 0 | 341 | 1,631,070 | 75,658 | 0 | 0 | -4,512 | 0 | 7,603 | 22 | 0 |
| Primary | Feversham Primary Academy | 396 | 1,749,780 | 52,098 | 0 | 0 | 0 | 396 | 1,749,780 | 56,503 | 0 | 0 | -4,404 | 0 | 8,196 | 21 | 3,258 |
| Primary | Foxhill Primary School | 213 | 831,734 | 33,197 | 0 | 0 | 10,111 | 213 | 831,734 | 34,978 | 0 | 0 | -1,781 | 10,111 | 3,606 | 17 | 391 |
| Primary | Frizinghall Primary School | 406 | 1,688,489 | 0 | 0 | 0 | 0 | 406 | 1,688,489 | 5,429 | 0 | 0 | -5,429 | 0 | 7,890 | 19 | 15,295 |
| Primary | Girlington Primary School | 421 | 1,817,480 | 3,874 | 0 | 0 | 0 | 421 | 1,817,480 | 8,803 | 0 | 0 | -5,319 | 0 | 8,535 | 20 | 0 |
| Primary | Glenaire Primary School | 183 | 852,828 | 61,691 | 0 | 0 | 0 | 183 | 852,828 | 63,657 | 0 | 0 | -1,965 | 0 | 3,711 | 20 | 455 |
| Primary | Green Lane Primary | 588 | 2,622,589 | 177,958 | 0 | 0 | 0 | 588 | 2,622,589 | 184,694 | 0 | 0 | -6,737 | 0 | 12,560 | 21 | 428 |
| Primary | Greengates Primary School | 213 | 920,100 | 52,604 | 0 | 0 | 0 | 213 | 920,100 | 54,567 | 0 | 0 | -1,963 | 0 | 4,048 | 19 | 478 |
| Primary | Grove House Primary School | 413 | 1,593,064 | 0 | 0 | 0 | 0 | 413 | 1,593,064 | 4,274 | 0 | 0 | -4,274 | 0 | 7,412 | 18 | 0 |
| Primary | Harden Primary Academy | 205 | 795,000 | 66,084 | 0 | 0 | 12,366 | 205 | 795,000 | 67,108 | 0 | 0 | -1,024 | 12,366 | 3,422 | 17 | 366 |
| Primary | Haworth Primary Academy | 269 | 1,030,154 | 39,891 | 0 | 0 | 609 | 269 | 1,030,154 | 42,335 | 0 | 0 | -2,444 | 609 | 4,598 | 17 | 0 |
| Primary | Heaton St Barnabas' CE Primary School | 402 | 1,662,195 | 132,293 | 0 | 0 | 0 | 402 | 1,662,195 | 135,541 | 0 | 0 | -3,249 | 0 | 7,758 | 19 | 0 |
| Primary | High Craggs Primary Leadership Academy | 377 | 1,636,855 | 45,867 | 0 | 0 | 0 | 377 | 1,636,855 | 50,569 | 0 | 0 | -4,702 | 0 | 7,631 | 20 | 0 |
| Primary | Hill Top CE Primary School | 211 | 876,328 | 39,077 | 0 | 0 | 12,263 | 211 | 876,328 | 41,049 | 0 | 0 | -1,972 | 12,263 | 3,829 | 18 | 438 |
| Primary | Hollingwood Primary Academy | 414 | 1,655,184 | 0 | 0 | 0 | 0 | 414 | 1,655,184 | 4,953 | 0 | 0 | -4,953 | 0 | 7,723 | 19 | 0 |
| Primary | Holybrook Primary Academy | 200 | 1,023,071 | 88,087 | 0 | 0 | 0 | 200 | 1,023,071 | 90,430 | 0 | 0 | -2,344 | 0 | 4,563 | 23 | 597 |
| Primary | Holycroft Primary School | 371 | 1,628,505 | 50,672 | 0 | 0 | 0 | 371 | 1,628,505 | 54,688 | 0 | 0 | -4,016 | 0 | 7,589 | 20 | 935 |
| Primary | Home Farm Primary School | 409 | 1,665,783 | 43,005 | 0 | 0 | 0 | 409 | 1,665,783 | 47,684 | 0 | 0 | -4,679 | 0 | 7,776 | 19 | 915 |
| Primary | Horton Grange Primary | 608 | 2,639,816 | 0 | 0 | -7,820 | 0 | 608 | 2,639,816 | 1,588 | 0 | 0 | -9,407 | 0 | 12,646 | 21 | 0 |
| Primary | Horton Park Primary | 428 | 2,096,433 | 216,561 | 0 | 0 | 0 | 428 | 2,096,433 | 220,463 | 0 | 0 | -3,902 | 0 | 9,929 | 23 | 1,310 |
| Primary | Hoyle Court Primary School | 299 | 1,143,989 | 35,769 | 0 | 0 | 0 | 299 | 1,143,989 | 38,073 | 0 | 0 | -2,304 | 0 | 5,167 | 17 | 570 |
| Primary | Idle CE Primary School | 338 | 1,222,370 | 39,370 | 46,655 | 0 | 0 | 338 | 1,222,370 | 39,370 | 47,985 | 0 | -1,330 | 0 | 5,559 | 16 | 589 |
| Primary | Ingrow Primary School | 369 | 1,666,805 | 107,146 | 0 | 0 | 0 | 369 | 1,666,805 | 111,018 | 0 | 0 | -3,872 | 0 | 7,781 | 21 | 264 |
| Primary | Iqra Primary Academy | 608 | 2,518,422 | 188,735 | 0 | 0 | 0 | 608 | 2,518,422 | 191,227 | 0 | 0 | -2,492 | 0 | 12,039 | 20 | 1,457 |
| Primary | Keelham Primary School | 103 | 489,809 | 58,594 | 0 | 0 | 26,470 | 103 | 489,809 | 59,166 | 0 | 0 | -572 | 26,470 | 1,896 | 18 | 219 |
| Primary | Keighley St Andrew's CE Primary School | 369 | 1,596,003 | 0 | 0 | 0 | 0 | 369 | 1,596,003 | 5,313 | 0 | 0 | -5,313 | 0 | 7,427 | 20 | 0 |
| Primary | Killinghall Primary School | 632 | 2,641,049 | 0 | 0 | 0 | 0 | 632 | 2,641,049 | 8,724 | 0 | 0 | -8,724 | 0 | 12,652 | 20 | 0 |
| Primary | Knowleswood Primary School | 412 | 1,973,029 | 48,846 | 0 | 0 | 0 | 412 | 1,973,029 | 56,057 | 0 | 0 | -7,211 | 0 | 9,312 | 23 | 1,211 |
| Primary | Lapage Primary School and Nursery | 633 | 2,676,870 | 121,592 | 0 | 0 | 0 | 633 | 2,676,870 | 127,248 | 0 | 0 | -5,656 | 0 | 12,832 | 20 | 5,916 |
| Primary | Laycock Primary Academy | 97 | 554,503 | 64,387 | 0 | 0 | 0 | 97 | 554,503 | 65,593 | 0 | 0 | -1,206 | 0 | 2,220 | 23 | 291 |
| Primary | Lees Primary Academy | 209 | 819,293 | 46,530 | 0 | 0 | 8,866 | 209 | 819,293 | 48,002 | 0 | 0 | -1,471 | 8,866 | 3,544 | 17 | 385 |
| Primary | Ley Top Primary School | 316 | 1,454,573 | 49,890 | 0 | 0 | 0 | 316 | 1,454,573 | 53,626 | 0 | 0 | -3,736 | 0 | 6,720 | 21 | 15,962 |
| Primary | Lidget Green Primary School | 533 | 2,272,858 | 0 | 0 | 0 | 0 | 533 | 2,272,858 | 7,127 | 0 | 0 | -7,127 | 0 | 10,811 | 20 | 0 |
| Primary | Lilycroft Primary School | 413 | 1,771,414 | 26,101 | 0 | 0 | 0 | 413 | 1,771,414 | 30,747 | 0 | 0 | -4,647 | 0 | 8,304 | 20 | 1,015 |
| Primary | Lister Primary School | 388 | 1,631,303 | 10,269 | 0 | 0 | 0 | 388 | 1,631,303 | 14,647 | 0 | 0 | -4,378 | 0 | 7,604 | 20 | 15,710 |
| Primary | Long Lee Primary School | 380 | 1,480,923 | 34,654 | 0 | 0 | 0 | 380 | 1,480,923 | 38,526 | 0 | 0 | -3,872 | 0 | 6,852 | 18 | 777 |
| Primary | Low Ash Primary School | 422 | 1,586,924 | 39,919 | 0 | 0 | 0 | 422 | 1,586,924 | 43,910 | 0 | 0 | -3,990 | 0 | 7,382 | 17 | 821 |
| Primary | Low Moor CE Primary School | 416 | 1,550,160 | 33,611 | 0 | 0 | 909 | 416 | 1,550,160 | 37,369 | 0 | 0 | -3,759 | 909 | 7,198 | 17 | 794 |
| Primary | Lower Fields Primary School | 414 | 1,856,338 | 86,990 | 0 | 0 | 0 | 414 | 1,856,338 | 91,723 | 0 | 0 | -4,733 | 0 | 8,729 | 21 | 1,096 |
| Primary | Margaret McMillan Primary School | 591 | 2,427,587 | 0 | 0 | 0 | 0 | 591 | 2,427,587 | 8,313 | 0 | 0 | -8,313 | 0 | 11,585 | 20 | 0 |
| Primary | Marshfield Primary School | 416 | 1,724,837 | 66,319 | 0 | 0 | 0 | 416 | 1,724,837 | 69,657 | 0 | 0 | -3,338 | 0 | 8,071 | 19 | 959 |
| Primary | Menston Primary School | 435 | 1,522,500 | 0 | 126,664 | 0 | 14,288 | 435 | 1,522,500 | 0 | 128,690 | 0 | -2,026 | 14,288 | 7,060 | 16 | 0 |

| | | 2018/19 Financial Year (Actual) | | | | | | 2019/20 Financial Year (Illustrative Model Based on Same Pupil No.s and 0%) | | | | | | | | | |
|----------------------------------|---|---------------------------------|---|------------|-------------------------------|------------------------|---------------------------|---|---|----------|-------------------------------|--------------------------|---|--------------------|----------------|-------------------|--------------------------------------|
| Column Reference (see key below) | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| Phase | School | Funded Pupil No.s | Total Formula Funding (ex. Rates & BSF) | MFG (0.4%) | MFL (£3,500 prim; £4,800 sec) | Ceiling Reduction (3%) | SEND Funding Floor (Sept) | Funded Pupil No.s | Total Formula Funding (ex. Rates & BSF) | MFG (0%) | MFL (£3,500 prim; £4,800 sec) | Ceiling Reduction (none) | Clean Impact Prior Low Attainment NFF change (prim) | SEND Funding Floor | £ Diff to 0.5% | £APP Diff to 0.5% | Diff between 0.5% MFG & 1% NFF Floor |
| Primary | Merlin Top Primary Academy | 308 | 1,477,845 | 116,591 | 0 | 0 | 0 | 308 | 1,477,845 | 119,732 | 0 | 0 | -3,141 | 0 | 6,836 | 22 | 882 |
| Primary | Miriam Lord Community Primary School | 358 | 1,529,437 | 13,868 | 0 | 0 | 0 | 358 | 1,529,437 | 17,976 | 0 | 0 | -4,108 | 0 | 7,094 | 20 | 20,840 |
| Primary | Myrtle Park Primary School | 218 | 839,252 | 49,238 | 0 | 0 | 32,571 | 218 | 839,252 | 50,716 | 0 | 0 | -1,477 | 32,571 | 3,643 | 17 | 391 |
| Primary | Nessfield Primary School | 378 | 1,477,364 | 66,073 | 0 | 0 | 785 | 378 | 1,477,364 | 68,971 | 0 | 0 | -2,898 | 785 | 6,834 | 18 | 775 |
| Primary | Newby Primary School | 421 | 1,762,768 | 19,048 | 0 | 0 | 0 | 421 | 1,762,768 | 23,939 | 0 | 0 | -4,891 | 0 | 8,261 | 20 | 994 |
| Primary | Newhall Park Primary School | 403 | 1,663,646 | 52,713 | 0 | 0 | 0 | 403 | 1,663,646 | 56,985 | 0 | 0 | -4,272 | 0 | 7,765 | 19 | 924 |
| Primary | Oakworth Primary Academy | 421 | 1,473,500 | 0 | 74,288 | 0 | 0 | 421 | 1,473,500 | 0 | 76,389 | 0 | -2,101 | 0 | 6,815 | 16 | 681 |
| Primary | Oldfield Primary School | 62 | 396,376 | 79,438 | 0 | 0 | 31,679 | 62 | 396,376 | 79,808 | 0 | 0 | -370 | 31,679 | 1,429 | 23 | 1,264 |
| Primary | Our Lady & St Brendan's Catholic Primary School | 200 | 882,615 | 743 | 0 | 0 | 0 | 200 | 882,615 | 2,663 | 0 | 0 | -1,921 | 0 | 3,860 | 19 | 460 |
| Primary | Our Lady of Victories Catholic Primary Academy | 216 | 972,874 | 2,451 | 0 | 0 | 0 | 216 | 972,874 | 5,992 | 0 | 0 | -3,542 | 0 | 4,312 | 20 | 523 |
| Primary | Oxenhope CE Primary Academy | 197 | 767,527 | 52,731 | 0 | 0 | 8,471 | 197 | 767,527 | 53,891 | 0 | 0 | -1,160 | 8,471 | 3,285 | 17 | 352 |
| Primary | Parkland Primary School | 238 | 1,183,321 | 94,959 | 0 | 0 | 0 | 238 | 1,183,321 | 97,971 | 0 | 0 | -3,012 | 0 | 5,364 | 23 | 0 |
| Primary | Parkwood Primary School | 202 | 1,083,608 | 160,972 | 0 | 0 | 0 | 202 | 1,083,608 | 163,244 | 0 | 0 | -2,287 | 0 | 4,865 | 24 | 134 |
| Primary | Peel Park Primary School | 587 | 2,533,915 | 95,251 | 0 | 0 | 0 | 587 | 2,533,915 | 101,203 | 0 | 0 | -5,953 | 0 | 12,117 | 21 | 21,279 |
| Primary | Poplars Farm Primary School | 214 | 917,559 | 37,648 | 0 | 0 | 0 | 214 | 917,559 | 39,384 | 0 | 0 | -1,736 | 0 | 4,035 | 19 | 3,045 |
| Primary | Princeville Primary School and Children's Centre | 543 | 2,315,664 | 0 | 0 | 0 | 0 | 543 | 2,315,664 | 6,465 | 0 | 0 | -6,465 | 0 | 11,025 | 20 | 0 |
| Primary | Rainbow Primary Free School | 371 | 1,723,532 | 0 | 0 | 0 | 0 | 371 | 1,723,532 | 4,494 | 0 | 0 | -4,494 | 0 | 8,065 | 22 | 0 |
| Primary | Reevy Hill Primary School | 201 | 1,017,940 | 64,504 | 0 | 0 | 0 | 201 | 1,017,940 | 67,133 | 0 | 0 | -2,629 | 0 | 4,537 | 23 | 591 |
| Primary | Riddlesden St Mary's CE Primary | 375 | 1,530,522 | 0 | 0 | 0 | 0 | 375 | 1,530,522 | 5,253 | 0 | 0 | -5,253 | 0 | 7,100 | 19 | 0 |
| Primary | Russell Hall Primary School | 213 | 877,803 | 45,858 | 0 | 0 | 14,389 | 213 | 877,803 | 47,805 | 0 | 0 | -1,946 | 14,389 | 3,836 | 18 | 436 |
| Primary | Ryecroft Primary Academy | 261 | 1,357,002 | 133,914 | 0 | 0 | 0 | 261 | 1,357,002 | 137,545 | 0 | 0 | -3,631 | 0 | 6,232 | 24 | 0 |
| Primary | Saltaire Primary School | 422 | 1,544,633 | 64,748 | 0 | 0 | 0 | 422 | 1,544,633 | 67,633 | 117 | 0 | -3,001 | 0 | 7,170 | 17 | 780 |
| Primary | Sandal Primary School and Nursery | 414 | 1,464,998 | 15,998 | 61,454 | 0 | 4,924 | 414 | 1,464,998 | 15,998 | 63,775 | 0 | -2,321 | 4,924 | 6,772 | 16 | 714 |
| Primary | Sandy Lane Primary School | 297 | 1,205,536 | 38,999 | 0 | 0 | 0 | 297 | 1,205,536 | 41,778 | 0 | 0 | -2,780 | 0 | 5,475 | 18 | 2,724 |
| Primary | Shibden Head Primary Academy | 418 | 1,477,567 | 12,302 | 0 | 0 | 0 | 418 | 1,477,567 | 14,567 | 1,595 | 0 | -3,859 | 0 | 6,835 | 16 | 720 |
| Primary | Shipley CE Primary School | 203 | 876,269 | 47,868 | 0 | 0 | 0 | 203 | 876,269 | 50,131 | 0 | 0 | -2,263 | 0 | 3,829 | 19 | 450 |
| Primary | Shirley Manor Primary Academy | 196 | 955,739 | 80,902 | 0 | 0 | 0 | 196 | 955,739 | 83,008 | 0 | 0 | -2,106 | 0 | 4,226 | 22 | 0 |
| Primary | Silsden Primary School | 569 | 2,128,269 | 114,128 | 0 | 0 | 17,421 | 569 | 2,095,264 | 75,435 | 43,051 | 0 | -4,352 | 17,421 | -34,304 | -60 | 0 |
| Primary | Southmere Primary Academy | 372 | 1,726,175 | 0 | 0 | -3,304 | 0 | 372 | 1,726,175 | 1,617 | 0 | 0 | -4,920 | 0 | 8,078 | 22 | 6,705 |
| Primary | St Anne's Catholic Primary Academy | 234 | 986,324 | 11,218 | 0 | 0 | 0 | 234 | 986,324 | 14,123 | 0 | 0 | -2,905 | 0 | 4,379 | 19 | 511 |
| Primary | St Anthony's Catholic Primary School (Clayton) | 210 | 889,067 | 46,114 | 0 | 0 | 0 | 210 | 889,067 | 47,945 | 0 | 0 | -1,830 | 0 | 3,892 | 19 | 450 |
| Primary | St Anthony's Catholic Primary School (Shipley) | 128 | 612,565 | 57,457 | 0 | 0 | 12,043 | 128 | 612,565 | 58,601 | 0 | 0 | -1,144 | 12,043 | 2,510 | 20 | 303 |
| Primary | St Clare's Catholic Primary School | 206 | 973,867 | 60,216 | 0 | 0 | 0 | 206 | 973,867 | 62,780 | 0 | 0 | -2,564 | 0 | 4,316 | 21 | 0 |
| Primary | St Columba's Catholic Primary School | 377 | 1,653,650 | 68,753 | 0 | 0 | 0 | 377 | 1,653,650 | 73,160 | 0 | 0 | -4,407 | 0 | 7,715 | 20 | 951 |
| Primary | St Cuthbert & the First Martyrs' Catholic Primary | 204 | 873,733 | 23,828 | 0 | 0 | 14,733 | 204 | 873,733 | 25,549 | 0 | 0 | -1,720 | 14,733 | 3,816 | 19 | 446 |
| Primary | St Francis' Catholic Primary School | 207 | 849,510 | 52,896 | 0 | 0 | 0 | 207 | 849,510 | 54,478 | 0 | 0 | -1,583 | 0 | 3,695 | 18 | 416 |
| Primary | St James' Church Primary School | 279 | 1,323,182 | 58,054 | 0 | 0 | 0 | 279 | 1,323,182 | 61,735 | 0 | 0 | -3,681 | 0 | 6,063 | 22 | 774 |
| Primary | St John The Evangelist Catholic Primary | 207 | 851,764 | 25,327 | 0 | 0 | 0 | 207 | 851,764 | 27,351 | 0 | 0 | -2,024 | 0 | 3,706 | 18 | 420 |
| Primary | St John's CE Primary School | 422 | 1,748,092 | 80,433 | 0 | 0 | 0 | 422 | 1,748,092 | 84,194 | 0 | 0 | -3,761 | 0 | 8,188 | 19 | 979 |
| Primary | St Joseph's Catholic Primary School (Bingley) | 206 | 799,937 | 56,407 | 0 | 0 | 10,512 | 206 | 799,937 | 57,649 | 0 | 0 | -1,242 | 10,512 | 3,447 | 17 | 371 |
| Primary | St Joseph's Catholic Primary School (Bradford) | 304 | 1,370,220 | 50,178 | 0 | 0 | 0 | 304 | 1,370,220 | 53,538 | 0 | 0 | -3,361 | 0 | 6,298 | 21 | 782 |
| Primary | St Joseph's Catholic Primary, Keighley | 258 | 1,105,546 | 81,136 | 0 | 0 | 0 | 258 | 1,105,546 | 83,216 | 0 | 0 | -2,080 | 0 | 4,975 | 19 | 591 |
| Primary | St Luke's CE Primary School | 212 | 917,860 | 63,165 | 0 | 0 | 0 | 212 | 917,860 | 64,960 | 0 | 0 | -1,795 | 0 | 4,036 | 19 | 477 |

| Column Reference (see key below) | | 2018/19 Financial Year (Actual) | | | | | | 2019/20 Financial Year (Illustrative Model Based on Same Pupil No.s and 0%) | | | | | | | | | |
|----------------------------------|---|---------------------------------|---|------------|-------------------------------|------------------------|---------------------------|---|---|----------|-------------------------------|--------------------------|---|--------------------|----------------|-------------------|--------------------------------------|
| | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| Phase | School | Funded Pupil No.s | Total Formula Funding (ex. Rates & BSF) | MFG (0.4%) | MFL (£3,500 prim; £4,800 sec) | Ceiling Reduction (3%) | SEND Funding Floor (Sept) | Funded Pupil No.s | Total Formula Funding (ex. Rates & BSF) | MFG (0%) | MFL (£3,500 prim; £4,800 sec) | Ceiling Reduction (none) | Clean Impact Prior Low Attainment NFF change (prim) | SEND Funding Floor | £ Diff to 0.5% | £APP Diff to 0.5% | Diff between 0.5% MFG & 1% NFF Floor |
| Primary | St Mary's and St Peter's Catholic | 201 | 973,730 | 52,152 | 0 | 0 | 0 | 201 | 973,730 | 54,489 | 0 | 0 | -2,337 | 0 | 4,316 | 21 | 5,211 |
| Primary | St Matthew's Catholic Primary School | 213 | 987,844 | 45,367 | 0 | 0 | 0 | 213 | 987,844 | 48,141 | 0 | 0 | -2,774 | 0 | 4,386 | 21 | 544 |
| Primary | St Matthew's CE Primary School | 414 | 1,748,167 | 37,657 | 0 | 0 | 0 | 414 | 1,748,167 | 41,713 | 0 | 0 | -4,057 | 0 | 8,188 | 20 | 3,559 |
| Primary | St Oswald's CE Primary Academy | 352 | 1,661,974 | 81,147 | 0 | 0 | 0 | 352 | 1,661,974 | 85,986 | 0 | 0 | -4,838 | 0 | 7,757 | 22 | 0 |
| Primary | St Paul's CE Primary School | 207 | 878,640 | 48,635 | 0 | 0 | 0 | 207 | 878,640 | 50,458 | 0 | 0 | -1,822 | 0 | 3,840 | 19 | 446 |
| Primary | St Philip's CE Primary Academy | 203 | 928,473 | 7,730 | 0 | 0 | 0 | 203 | 928,473 | 10,432 | 0 | 0 | -2,702 | 0 | 4,090 | 20 | 499 |
| Primary | St Stephen's CE Primary School | 415 | 1,799,587 | 0 | 0 | 0 | 0 | 415 | 1,799,587 | 5,779 | 0 | 0 | -5,779 | 0 | 8,445 | 20 | 0 |
| Primary | St Walburga's Catholic Primary School | 210 | 825,931 | 56,256 | 0 | 0 | 9,291 | 210 | 825,931 | 57,497 | 0 | 0 | -1,242 | 9,291 | 3,577 | 17 | 390 |
| Primary | St William's Catholic Primary School | 182 | 859,332 | 18,430 | 0 | 0 | 1,553 | 182 | 859,332 | 20,970 | 0 | 0 | -2,540 | 1,553 | 3,744 | 21 | 464 |
| Primary | St Winefride's Catholic Primary | 417 | 1,584,485 | 44,004 | 0 | 0 | 0 | 417 | 1,584,485 | 47,504 | 0 | 0 | -3,500 | 0 | 7,370 | 18 | 826 |
| Primary | Stanbury Village School | 92 | 451,968 | 63,919 | 0 | 0 | 19,085 | 92 | 451,968 | 64,310 | 0 | 0 | -391 | 19,085 | 1,707 | 19 | 199 |
| Primary | Steeton Primary School | 298 | 1,161,884 | 27,924 | 0 | 0 | 0 | 298 | 1,161,884 | 31,004 | 0 | 0 | -3,080 | 0 | 5,257 | 18 | 586 |
| Primary | Stocks Lane Primary School | 150 | 658,655 | 49,389 | 0 | 0 | 22,456 | 150 | 658,655 | 50,719 | 0 | 0 | -1,330 | 22,456 | 2,740 | 18 | 312 |
| Primary | Swain House Primary School | 438 | 1,757,795 | 38,813 | 0 | 0 | 0 | 438 | 1,757,795 | 43,410 | 0 | 0 | -4,597 | 0 | 8,236 | 19 | 0 |
| Primary | Thackley Primary School | 420 | 1,477,993 | 7,993 | 37,435 | 0 | 0 | 420 | 1,477,993 | 7,993 | 39,945 | 0 | -2,510 | 0 | 6,837 | 16 | 716 |
| Primary | The Sacred Heart Catholic Primary Academy | 197 | 752,051 | 45,951 | 0 | 0 | 19,256 | 197 | 752,051 | 47,089 | 0 | 0 | -1,138 | 19,256 | 3,207 | 16 | 337 |
| Primary | Thornbury Primary Leadership Academy | 578 | 2,453,166 | 0 | 0 | 0 | 0 | 578 | 2,453,166 | 7,094 | 0 | 0 | -7,094 | 0 | 11,713 | 20 | 5,880 |
| Primary | Thornton Primary School | 577 | 2,146,151 | 7,429 | 0 | 0 | 0 | 577 | 2,146,151 | 12,989 | 0 | 0 | -5,560 | 0 | 10,178 | 18 | 1,138 |
| Primary | Thorpe Primary School | 206 | 891,647 | 39,350 | 0 | 0 | 0 | 206 | 891,647 | 41,326 | 0 | 0 | -1,976 | 0 | 3,905 | 19 | 460 |
| Primary | Trinity All Saints CE Primary School | 337 | 1,301,354 | 50,075 | 0 | 0 | 1,431 | 337 | 1,301,354 | 52,541 | 0 | 0 | -2,466 | 1,431 | 5,954 | 18 | 668 |
| Primary | Victoria Primary School | 262 | 1,142,188 | 22,900 | 0 | 0 | 0 | 262 | 1,142,188 | 26,366 | 0 | 0 | -3,466 | 0 | 5,158 | 20 | 1,909 |
| Primary | Wellington Primary School | 430 | 1,642,934 | 0 | 0 | 0 | 0 | 430 | 1,642,934 | 4,852 | 0 | 0 | -4,852 | 0 | 7,662 | 18 | 0 |
| Primary | Westbourne Primary School | 405 | 1,750,333 | 11,905 | 0 | 0 | 0 | 405 | 1,750,333 | 16,649 | 0 | 0 | -4,745 | 0 | 8,199 | 20 | 1,006 |
| Primary | Westminster CE Primary Academy | 589 | 2,571,250 | 47,962 | 0 | 0 | 0 | 589 | 2,571,250 | 56,460 | 0 | 0 | -8,498 | 0 | 12,303 | 21 | 1,182 |
| Primary | Whetley Primary Academy | 495 | 2,155,674 | 406 | 0 | 0 | 0 | 495 | 2,155,674 | 6,354 | 0 | 0 | -5,947 | 0 | 10,226 | 21 | 47,223 |
| Primary | Wibsey Primary School | 623 | 2,386,359 | 18,951 | 0 | 0 | 0 | 623 | 2,386,359 | 24,474 | 0 | 0 | -5,477 | 0 | 11,379 | 18 | 981 |
| Primary | Wilsden Primary School | 382 | 1,337,000 | 0 | 19,142 | 0 | 7,656 | 382 | 1,337,000 | 0 | 22,038 | 0 | -2,896 | 7,656 | 6,132 | 16 | 0 |
| Primary | Woodlands Primary Academy | 97 | 474,349 | 57,812 | 0 | 0 | 6,480 | 97 | 474,349 | 58,436 | 0 | 0 | -624 | 6,480 | 1,819 | 19 | 213 |
| Primary | Woodside Academy | 404 | 1,812,338 | 104,545 | 0 | 0 | 0 | 404 | 1,812,338 | 108,656 | 0 | 0 | -4,112 | 0 | 8,509 | 21 | 887 |
| Primary | Worth Valley Primary | 196 | 948,270 | 68,222 | 0 | 0 | 0 | 196 | 948,270 | 70,625 | 0 | 0 | -2,403 | 0 | 4,189 | 21 | 529 |
| Primary | Worthinghead Primary School | 199 | 871,966 | 85,034 | 0 | 0 | 1,204 | 199 | 871,966 | 86,143 | 0 | 0 | -1,110 | 1,204 | 3,807 | 19 | 450 |
| Primary | Wycliffe CE Primary School | 334 | 1,297,259 | 53,003 | 0 | 0 | 0 | 334 | 1,297,259 | 55,948 | 0 | 0 | -2,945 | 0 | 5,933 | 18 | 666 |
| Secondary | Beckfoot Academy | 1,370 | 6,576,000 | 0 | 158,496 | 0 | 0 | 1,370 | 6,595,456 | 0 | 158,496 | 0 | | 0 | 5,837 | 4 | 0 |
| Secondary | Beckfoot Oakbank Academy | 1,333 | 7,149,272 | 0 | 0 | 0 | 0 | 1,333 | 7,149,272 | 0 | 0 | 0 | | 0 | 35,746 | 27 | 0 |
| Secondary | Beckfoot Thornton Academy | 1,274 | 6,840,132 | 0 | 0 | -12,548 | 0 | 1,274 | 6,852,680 | 0 | 0 | 0 | | 0 | 34,263 | 27 | 0 |
| Secondary | Beckfoot Upper Heaton Academy | 431 | 2,740,598 | 258,887 | 0 | 0 | 0 | 431 | 2,740,598 | 258,887 | 0 | 0 | | 0 | 13,150 | 31 | 123 |
| Secondary | Belle Vue Girls' Academy | 933 | 5,160,028 | 35,864 | 0 | 0 | 0 | 933 | 5,160,028 | 35,864 | 0 | 0 | | 0 | 25,247 | 27 | 0 |
| Secondary | Bingley Grammar School | 1,491 | 7,186,714 | 0 | 0 | 0 | 0 | 1,491 | 7,187,141 | 0 | 428 | 0 | | 0 | 35,506 | 24 | 0 |
| Secondary | Bradford Forster Academy | 659 | 3,868,257 | 0 | 0 | 0 | 0 | 872 | 5,132,750 | 0 | 0 | 0 | | 0 | 25,664 | 29 | 0 |
| Secondary | Bronte Girls' Academy | 0 | 0 | 0 | 0 | 0 | 0 | 70 | 420,471 | 0 | 0 | 0 | | 0 | 2,102 | 30 | 0 |
| Secondary | Buttershaw Business & Enterprise College | 1,310 | 7,128,087 | 0 | 0 | 0 | 0 | 1,310 | 7,145,442 | 0 | 0 | 0 | | 0 | 35,640 | 27 | 0 |
| Secondary | Carlton Bolling College | 1,299 | 7,496,600 | 177,334 | 0 | 0 | 0 | 1,299 | 7,496,600 | 177,334 | 0 | 0 | | 0 | 36,930 | 28 | 0 |
| Secondary | Dixons City Academy | 832 | 4,354,318 | 63,359 | 0 | 0 | 0 | 832 | 4,354,318 | 63,359 | 0 | 0 | | 0 | 21,219 | 26 | 0 |

| Column Reference (see key below) | | 2018/19 Financial Year (Actual) | | | | | | 2019/20 Financial Year (Illustrative Model Based on Same Pupil No.s and 0%) | | | | | | | | | |
|----------------------------------|--|---------------------------------|---|------------------|-------------------------------|------------------------|---------------------------|---|---|----------|-------------------------------|--------------------------|---|--------------------|----------------|-------------------|--------------------------------------|
| | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| Phase | School | Funded Pupil No.s | Total Formula Funding (ex. Rates & BSF) | MFG (0.4%) | MFL (£3,500 prim; £4,800 sec) | Ceiling Reduction (3%) | SEND Funding Floor (Sept) | Funded Pupil No.s | Total Formula Funding (ex. Rates & BSF) | MFG (0%) | MFL (£3,500 prim; £4,800 sec) | Ceiling Reduction (none) | Clean Impact Prior Low Attainment NFF change (prim) | SEND Funding Floor | £ Diff to 0.5% | £APP Diff to 0.5% | Diff between 0.5% MFG & 1% NFF Floor |
| Secondary | Dixons Cottingley Academy | 596 | 3,492,095 | 64,141 | 0 | 0 | 0 | 596 | 3,492,095 | 64,141 | 0 | 0 | | 0 | 16,908 | 28 | 0 |
| Secondary | Dixons Kings Academy | 831 | 4,494,788 | 53,766 | 0 | 0 | 0 | 831 | 4,494,788 | 53,766 | 0 | 0 | | 0 | 21,921 | 26 | 0 |
| Secondary | Dixons McMillan Academy | 519 | 2,854,810 | 118,312 | 0 | 0 | 0 | 519 | 2,854,810 | 118,312 | 0 | 0 | | 0 | 13,721 | 26 | 0 |
| Secondary | Dixons Trinity Academy | 563 | 3,052,087 | 110,782 | 0 | 0 | 0 | 563 | 3,052,087 | 110,782 | 0 | 0 | | 0 | 14,708 | 26 | 0 |
| Secondary | Eden Boys Leadership Academy | 0 | 0 | 0 | 0 | 0 | 0 | 70 | 443,724 | 0 | 0 | 0 | | 0 | 2,219 | 32 | 0 |
| Secondary | Feversham College | 628 | 3,601,768 | 184,741 | 0 | 0 | 0 | 628 | 3,601,768 | 184,741 | 0 | 0 | | 0 | 17,456 | 28 | 0 |
| Secondary | Grange Technology College | 1,490 | 8,423,168 | 0 | 0 | 0 | 0 | 1,490 | 8,445,383 | 0 | 0 | 0 | | 0 | 42,116 | 28 | 0 |
| Secondary | Hanson School | 1,301 | 6,855,282 | 0 | 0 | -209,687 | 0 | 1,301 | 7,078,549 | 0 | 0 | 0 | | 0 | 35,325 | 27 | 0 |
| Secondary | Ilkley Grammar School | 1,289 | 6,187,200 | 0 | 358,162 | 0 | 8,051 | 1,289 | 6,270,244 | 0 | 441,206 | 0 | | 8,051 | 415 | 0 | 0 |
| Secondary | Immanuel College Academy | 1,164 | 5,866,293 | 0 | 0 | 0 | 0 | 1,164 | 5,866,293 | 0 | 0 | 0 | | 0 | 29,331 | 25 | 0 |
| Secondary | Laisterdyke Leadership Academy | 827 | 4,835,836 | 0 | 0 | 0 | 0 | 827 | 4,835,836 | 0 | 0 | 0 | | 0 | 24,179 | 29 | 0 |
| Secondary | Oasis Academy Lister Park | 793 | 4,615,080 | 36,225 | 0 | 0 | 0 | 793 | 4,615,080 | 36,225 | 0 | 0 | | 0 | 22,523 | 28 | 0 |
| Secondary | One In A Million (Free School) | 339 | 2,054,896 | 11,829 | 0 | 0 | 623 | 339 | 2,054,896 | 11,829 | 0 | 0 | | 623 | 9,722 | 29 | 0 |
| Secondary | Parkside School | 900 | 4,375,149 | 0 | 0 | 0 | 0 | 900 | 4,375,149 | 0 | 0 | 0 | | 0 | 21,876 | 24 | 0 |
| Secondary | Queensbury Academy | 893 | 4,652,078 | 0 | 0 | 0 | 0 | 893 | 4,652,078 | 0 | 0 | 0 | | 0 | 23,260 | 26 | 0 |
| Secondary | St Bede's & St Joseph's Catholic College | 1,490 | 7,864,327 | 99,793 | 0 | 0 | 0 | 1,490 | 7,864,327 | 99,793 | 0 | 0 | | 0 | 38,769 | 26 | 0 |
| Secondary | The Holy Family Catholic School | 785 | 4,168,568 | 0 | 0 | 0 | 0 | 785 | 4,168,568 | 0 | 0 | 0 | | 0 | 20,843 | 27 | 0 |
| Secondary | Titus Salt School | 1,238 | 6,338,099 | 0 | 0 | 0 | 0 | 1,238 | 6,347,744 | 0 | 0 | 0 | | 0 | 31,690 | 26 | 0 |
| Secondary | Tong Leadership Academy | 968 | 5,677,695 | 0 | 0 | -22,346 | 0 | 968 | 5,717,444 | 0 | 0 | 0 | | 0 | 28,500 | 29 | 0 |
| Secondary | University Academy Keighley | 611 | 3,704,950 | 269,297 | 0 | 0 | 0 | 611 | 3,697,040 | 248,300 | 0 | 0 | | 0 | 21,149 | 35 | 9,329 |
| | | | | 8,870,959 | 1,314,493 | -277,887 | 481,376 | | | | 9,346,489 | 1,475,786 | 0 | -547,155 | 481,376 | 1,829,525 | |

Key to Columns

| | |
|----|--|
| 1 | The number of reception to year 11 pupils funded in 2018/19 taken from the October 2017 Census with adjustments made for newly establishing schools. |
| 2 | The Local Authority's calculated 2018/19 financial year formula funding allocation excluding business rates and BSF funding. This total also does not include early years, post 16 funding or Growth Fund. |
| 3 | The Minimum Funding Guarantee (MFG) protection within the school's 2018/19 allocation shown in column 2. The MFG in 2018/19 was set at + 0.4%. A zero = the school is funded at or above the level of the MFG. |
| 4 | The top up to bring a school's 2018/19 formula funding per pupil up to the minimums of £3,500 (primary) and £4,800 (secondary). This funding is included in column 2. A zero = no top up. |
| 5 | The value by which a school's allocation in 2018/19 has been reduced following the application of the + 3% per pupil ceiling. A zero = no reduction has been applied. This reduction is included in column 2. |
| 6 | The value of the SEND Funding Floor allocation in 2018/19. 2018/19 allocations were protected at 2017/18 cash levels. This is funding in addition to the total shown in column 2. |
| 7 | The number of reception to year 11 pupils funded in 2018/19 taken from the October 2017 Census with adjustments made for newly establishing schools. |
| 8 | The Local Authority's illustrative 2019/20 financial year formula funding allocation excluding business rates and BSF funding. This total also does not include early years, post 16 funding or Growth Fund. |
| 9 | The Minimum Funding Guarantee (MFG) protection within the school's 2019/20 allocation shown in column 8 based on an MFG of 0%. A zero = the school is funded at or above the level of the MFG. |
| 10 | The top up to bring a school's 2019/20 illustrative formula funding per pupil up to the minimums of £3,500 (primary) and £4,800 (secondary). This funding is included in column 8. A zero = no top up. |
| 11 | The value by which a school's illustrative allocation in 2019/20 would be reduced following the application of a per pupil ceiling. As we propose not to have a ceiling, there aren't any reductions. |
| 12 | The illustrative impact of the amendment to the primary low prior attainment NFF value. Schools on the MFG will see that the value of MFG shown in column 9 increases to negate this reduction. |
| 13 | The illustrative value of the SEND Funding Floor allocation in 2019/20 where we continue to protect allocations at 2017/18 cash levels. This is funding in addition to the total shown in column 8. |
| 14 | The illustrative value of the difference between a 0% settlement (0% MFG and 0% NFF variables) and a + 0.5% settlement (0.5% MFG and 0.5% NFF variables). This shows the impact of decisions 2 and 3. |
| 15 | The column 14 difference shown as an amount per pupil (column 14 divided by column 7). |
| 16 | The illustrative value of the difference between a + 0.5% settlement (0.5% MFG and 0.5% NFF variables) and the DfE's optional 1% on 2017/18 NFF baselines. Please refer to Decision 3c. |

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Based on 2018/19 Financial Year Allocations

| Column Reference (see key below) | | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
|----------------------------------|--|---|---------------------------|------------------------------|-----------------------------|---------------------------|-------------------------|---------------------------------|
| Phase | School | Total Formula Funding (ex. Rates & BSF) | Total AEN Formula Funding | Defined Notional SEND Budget | Notional SEND as a % of (1) | SEND Funding Floor (Sept) | SEND EHCP Top Up (Sept) | Total SEND Resource (3 + 5 + 6) |
| All Through | Appleton Academy | 6,042,818 | 1,458,174 | 905,026 | 15.0% | 0 | 83,231 | 988,257 |
| All Through | Bradford Academy | 8,135,112 | 2,180,194 | 1,377,262 | 16.9% | 0 | 124,551 | 1,501,813 |
| All Through | Bradford Girls Grammar (Free School) | 4,311,413 | 801,010 | 578,878 | 13.4% | 0 | 84,909 | 663,787 |
| All Through | Dixons Allerton Academy | 7,850,508 | 1,859,436 | 1,179,800 | 15.0% | 0 | 132,096 | 1,311,896 |
| Primary | Addingham Primary School | 837,091 | 54,065 | 90,331 | 10.8% | 10,453 | 11,757 | 112,541 |
| Primary | All Saints' CE Primary School (Bradford) | 2,658,645 | 839,448 | 522,198 | 19.6% | 0 | 14,547 | 536,745 |
| Primary | All Saints' CE Primary School (Ilkley) | 1,097,377 | 69,981 | 121,334 | 11.1% | 29,377 | 5,999 | 156,709 |
| Primary | Ashlands Primary School | 1,470,000 | 141,795 | 193,865 | 13.2% | 17,936 | 50,094 | 261,895 |
| Primary | Atlas School | 990,891 | 263,607 | 161,025 | 16.3% | 0 | 0 | 161,025 |
| Primary | Baildon CE Primary School | 1,444,940 | 118,690 | 178,909 | 12.4% | 8,097 | 11,096 | 198,102 |
| Primary | Bankfoot Primary School | 1,089,309 | 233,019 | 149,481 | 13.7% | 0 | 19,353 | 168,834 |
| Primary | Barkerend Primary Leadership Academy | 1,877,737 | 569,050 | 352,250 | 18.8% | 0 | 17,756 | 370,006 |
| Primary | Beckfoot Allerton Primary Academy | 1,715,301 | 344,255 | 244,144 | 14.2% | 0 | 6,856 | 251,001 |
| Primary | Beckfoot Heaton Primary Academy | 2,655,358 | 796,576 | 515,420 | 19.4% | 0 | 63,461 | 578,881 |
| Primary | Beckfoot Priestthorpe Primary School | 807,109 | 111,138 | 106,028 | 13.1% | 3,966 | 952 | 110,946 |
| Primary | Ben Rhydding Primary School | 797,124 | 55,800 | 92,531 | 11.6% | 15,080 | 10,596 | 118,207 |
| Primary | Blakehill Primary School | 1,527,786 | 249,386 | 243,653 | 15.9% | 0 | 11,895 | 255,548 |
| Primary | Bowling Park Primary School | 2,763,851 | 927,469 | 563,337 | 20.4% | 0 | 28,989 | 592,326 |
| Primary | Brackenhill Primary School | 1,800,647 | 521,283 | 349,143 | 19.4% | 0 | 40,460 | 389,603 |
| Primary | Burley & Woodhead CE Primary School | 808,799 | 43,963 | 84,571 | 10.5% | 8,013 | 4,597 | 97,180 |
| Primary | Burley Oaks Primary School | 1,505,000 | 116,854 | 186,809 | 12.4% | 226 | 11,017 | 198,052 |
| Primary | Byron Primary Academy | 2,619,854 | 731,935 | 474,543 | 18.1% | 0 | 16,204 | 490,747 |
| Primary | Carrwood Primary School | 1,694,149 | 548,114 | 312,700 | 18.5% | 0 | 46,509 | 359,209 |
| Primary | Cavendish Primary School | 1,828,624 | 534,460 | 365,689 | 20.0% | 0 | 35,336 | 401,025 |
| Primary | Christ Church Primary Academy | 945,425 | 237,279 | 141,679 | 15.0% | 0 | 5,148 | 146,828 |
| Primary | Clayton St John's CE Primary Academy | 1,515,766 | 254,496 | 219,903 | 14.5% | 0 | 25,788 | 245,691 |
| Primary | Clayton Village Primary School | 911,535 | 179,320 | 139,799 | 15.3% | 0 | 3,000 | 142,798 |
| Primary | Copthorne Primary | 1,808,215 | 541,578 | 370,214 | 20.5% | 0 | 28,092 | 398,306 |
| Primary | Cottingley Village Primary School | 1,558,761 | 207,931 | 197,907 | 12.7% | 1,202 | 21,182 | 220,291 |
| Primary | Crossflatts Primary School | 1,480,500 | 171,960 | 214,855 | 14.5% | 1,041 | 27,029 | 242,925 |
| Primary | Crossley Hall Primary School | 2,525,623 | 750,808 | 499,674 | 19.8% | 0 | 65,270 | 564,944 |
| Primary | Cullingworth Village Primary School | 1,051,639 | 138,199 | 145,631 | 13.8% | 12,868 | 25,868 | 184,367 |
| Primary | Denholme Primary | 869,824 | 155,275 | 137,221 | 15.8% | 522 | 3,000 | 140,743 |
| Primary | Dixons Manningham Primary Academy | 1,619,141 | 501,195 | 324,336 | 20.0% | 0 | 13,636 | 337,971 |
| Primary | Dixons Marchbank Academy | 1,891,749 | 542,469 | 348,007 | 18.4% | 0 | 20,845 | 368,852 |
| Primary | Dixons Music Primary | 1,474,937 | 257,642 | 205,989 | 14.0% | 0 | 29,484 | 235,473 |
| Primary | East Morton CE Primary Academy | 798,963 | 63,662 | 89,764 | 11.2% | 14,326 | 7,596 | 111,687 |
| Primary | Eastburn Junior and Infant School | 792,036 | 87,705 | 111,168 | 14.0% | 25,030 | 16,256 | 152,454 |
| Primary | Eastwood Primary School | 1,757,179 | 481,460 | 303,939 | 17.3% | 0 | 40,769 | 344,708 |
| Primary | Eldwick Primary School | 1,694,000 | 167,462 | 233,275 | 13.8% | 2,744 | 3,951 | 239,970 |
| Primary | Fagley Primary School | 1,059,917 | 325,130 | 196,141 | 18.5% | 0 | 33,211 | 229,351 |
| Primary | Farfield Primary | 1,860,789 | 581,514 | 393,443 | 21.1% | 0 | 3,000 | 396,442 |
| Primary | Farnham Primary Academy | 1,830,132 | 543,937 | 348,629 | 19.0% | 0 | 19,789 | 368,418 |
| Primary | Fearnville Primary School | 1,631,070 | 513,030 | 304,227 | 18.7% | 0 | 3,373 | 307,600 |
| Primary | Feversham Primary Academy | 1,749,780 | 499,678 | 288,811 | 16.5% | 0 | 15,192 | 304,003 |
| Primary | Foxhill Primary School | 831,734 | 103,315 | 118,552 | 14.3% | 10,111 | 15,257 | 143,920 |
| Primary | Frizinghall Primary School | 1,688,489 | 463,011 | 321,314 | 19.0% | 0 | 24,385 | 345,700 |
| Primary | Girlington Primary School | 1,817,480 | 525,846 | 337,859 | 18.6% | 0 | 30,337 | 368,197 |
| Primary | Glenaire Primary School | 852,828 | 178,337 | 135,203 | 15.9% | 0 | 12,507 | 147,710 |
| Primary | Green Lane Primary | 2,622,589 | 719,119 | 447,636 | 17.1% | 0 | 42,992 | 490,628 |
| Primary | Greengates Primary School | 920,100 | 172,274 | 138,327 | 15.0% | 0 | 21,025 | 159,353 |
| Primary | Grove House Primary School | 1,593,064 | 348,354 | 279,484 | 17.5% | 0 | 531 | 280,016 |
| Primary | Harden Primary Academy | 795,000 | 55,673 | 84,502 | 10.6% | 12,366 | 4,597 | 101,465 |
| Primary | Haworth Primary Academy | 1,030,154 | 141,184 | 158,343 | 15.4% | 609 | 15,476 | 174,428 |
| Primary | Heaton St Barnabas' CE Primary School | 1,662,195 | 315,414 | 236,596 | 14.2% | 0 | 29,949 | 266,544 |
| Primary | High Craggs Primary Leadership Academy | 1,636,855 | 445,186 | 311,131 | 19.0% | 0 | 26,000 | 337,131 |
| Primary | Hill Top CE Primary School | 876,328 | 147,523 | 133,380 | 15.2% | 12,263 | 21,192 | 166,835 |

| Column Reference (see key below) | | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
|----------------------------------|--|---|---------------------------|------------------------------|-----------------------------|---------------------------|-------------------------|---------------------------------|
| Phase | School | Total Formula Funding (ex. Rates & BSF) | Total AEN Formula Funding | Defined Notional SEND Budget | Notional SEND as a % of (1) | SEND Funding Floor (Sept) | SEND EHCP Top Up (Sept) | Total SEND Resource (3 + 5 + 6) |
| Primary | Hollingwood Primary Academy | 1,655,184 | 407,726 | 309,604 | 18.7% | 0 | 9,461 | 319,064 |
| Primary | Holybrook Primary Academy | 1,023,071 | 275,479 | 170,577 | 16.7% | 0 | 12,611 | 183,187 |
| Primary | Holycroft Primary School | 1,628,505 | 448,516 | 275,277 | 16.9% | 0 | 26,740 | 302,017 |
| Primary | Home Farm Primary School | 1,665,783 | 389,058 | 306,003 | 18.4% | 0 | 24,103 | 330,106 |
| Primary | Horton Grange Primary | 2,639,816 | 858,661 | 558,860 | 21.2% | 0 | 51,444 | 610,304 |
| Primary | Horton Park Primary | 2,096,433 | 593,950 | 315,595 | 15.1% | 0 | 28,352 | 343,947 |
| Primary | Hoyle Court Primary School | 1,143,989 | 176,719 | 166,176 | 14.5% | 0 | 5,024 | 171,200 |
| Primary | Idle CE Primary School | 1,222,370 | 97,693 | 130,060 | 10.6% | 0 | 4,597 | 134,657 |
| Primary | Ingrow Primary School | 1,666,805 | 435,836 | 283,180 | 17.0% | 0 | 18,708 | 301,887 |
| Primary | Iqra Primary Academy | 2,518,422 | 549,226 | 289,032 | 11.5% | 0 | 27,828 | 316,860 |
| Primary | Keelham Primary School | 489,809 | 38,211 | 46,088 | 9.4% | 26,470 | 10,596 | 83,154 |
| Primary | Keighley St Andrew's CE Primary School | 1,596,003 | 472,181 | 319,987 | 20.0% | 0 | 77,910 | 397,897 |
| Primary | Killinghall Primary School | 2,641,049 | 794,650 | 536,054 | 20.3% | 0 | 64,480 | 600,533 |
| Primary | Knowleswood Primary School | 1,973,029 | 682,221 | 446,904 | 22.7% | 0 | 24,057 | 470,961 |
| Primary | Lapage Primary School and Nursery | 2,676,870 | 706,131 | 415,376 | 15.5% | 0 | 24,543 | 439,918 |
| Primary | Laycock Primary Academy | 554,503 | 113,597 | 80,384 | 14.5% | 0 | 3,651 | 84,034 |
| Primary | Lees Primary Academy | 819,293 | 88,530 | 105,926 | 12.9% | 8,866 | 12,193 | 126,985 |
| Primary | Ley Top Primary School | 1,454,573 | 426,475 | 260,098 | 17.9% | 0 | 13,662 | 273,760 |
| Primary | Lidget Green Primary School | 2,272,858 | 698,455 | 454,130 | 20.0% | 0 | 38,858 | 492,988 |
| Primary | Lilycroft Primary School | 1,771,414 | 500,604 | 311,937 | 17.6% | 0 | 40,336 | 352,273 |
| Primary | Lister Primary School | 1,631,303 | 445,010 | 281,861 | 17.3% | 0 | 40,544 | 322,405 |
| Primary | Long Lee Primary School | 1,480,923 | 292,225 | 254,969 | 17.2% | 0 | 42,501 | 297,471 |
| Primary | Low Ash Primary School | 1,586,924 | 277,568 | 263,376 | 16.6% | 0 | 22,983 | 286,359 |
| Primary | Low Moor CE Primary School | 1,550,160 | 263,597 | 252,288 | 16.3% | 909 | 10,596 | 263,793 |
| Primary | Lower Fields Primary School | 1,856,338 | 521,890 | 336,689 | 18.1% | 0 | 3,835 | 340,524 |
| Primary | Margaret McMillan Primary School | 2,427,587 | 693,833 | 488,486 | 20.1% | 0 | 62,275 | 550,761 |
| Primary | Marshfield Primary School | 1,724,837 | 405,566 | 253,637 | 14.7% | 0 | 29,288 | 282,925 |
| Primary | Menston Primary School | 1,522,500 | 90,683 | 168,802 | 11.1% | 14,288 | 7,168 | 190,258 |
| Primary | Merlin Top Primary Academy | 1,477,845 | 405,025 | 244,697 | 16.6% | 0 | 18,643 | 263,340 |
| Primary | Miriam Lord Community Primary School | 1,529,437 | 421,967 | 271,886 | 17.8% | 0 | 12,193 | 284,078 |
| Primary | Myrtle Park Primary School | 839,252 | 81,054 | 105,139 | 12.5% | 32,571 | 16,595 | 154,304 |
| Primary | Nessfield Primary School | 1,477,364 | 262,741 | 218,277 | 14.8% | 785 | 38,768 | 257,830 |
| Primary | Newby Primary School | 1,762,768 | 477,030 | 318,095 | 18.0% | 0 | 7,596 | 325,691 |
| Primary | Newhall Park Primary School | 1,663,646 | 393,697 | 290,008 | 17.4% | 0 | 37,648 | 327,656 |
| Primary | Oakworth Primary Academy | 1,473,500 | 132,523 | 177,227 | 12.0% | 0 | 10,160 | 187,387 |
| Primary | Oldfield Primary School | 396,376 | 36,579 | 30,442 | 7.7% | 31,679 | 5,727 | 67,847 |
| Primary | Our Lady & St Brendan's Catholic Primary School | 882,615 | 222,367 | 143,620 | 16.3% | 0 | 7,596 | 151,216 |
| Primary | Our Lady of Victories Catholic Primary Academy | 972,874 | 266,959 | 200,668 | 20.6% | 0 | 35,958 | 236,626 |
| Primary | Oxenhope CE Primary Academy | 767,527 | 63,533 | 88,753 | 11.6% | 8,471 | 5,999 | 103,224 |
| Primary | Parkland Primary School | 1,183,321 | 324,453 | 208,867 | 17.7% | 0 | 4,540 | 213,406 |
| Primary | Parkwood Primary School | 1,083,608 | 243,259 | 158,815 | 14.7% | 0 | 40,841 | 199,656 |
| Primary | Peel Park Primary School | 2,533,915 | 715,899 | 418,855 | 16.5% | 0 | 38,823 | 457,678 |
| Primary | Poplars Farm Primary School | 917,559 | 181,941 | 127,753 | 13.9% | 0 | 3,360 | 131,112 |
| Primary | Princeville Primary School and Children's Centre | 2,315,664 | 713,787 | 424,678 | 18.3% | 0 | 47,450 | 472,128 |
| Primary | Rainbow Primary Free School | 1,723,532 | 594,214 | 291,371 | 16.9% | 0 | 15,192 | 306,564 |
| Primary | Reevy Hill Primary School | 1,017,940 | 291,183 | 182,764 | 18.0% | 0 | 12,160 | 194,924 |
| Primary | Riddlesden St Mary's CE Primary | 1,530,522 | 390,215 | 308,533 | 20.2% | 0 | 24,385 | 332,919 |
| Primary | Russell Hall Primary School | 877,803 | 136,723 | 130,862 | 14.9% | 14,389 | 26,085 | 171,336 |
| Primary | Ryecroft Primary Academy | 1,357,002 | 395,989 | 245,860 | 18.1% | 0 | 19,617 | 265,477 |
| Primary | Saltaire Primary School | 1,544,633 | 210,448 | 220,731 | 14.3% | 0 | 46,146 | 266,877 |
| Primary | Sandal Primary School and Nursery | 1,464,998 | 140,089 | 184,148 | 12.6% | 4,924 | 12,193 | 201,265 |
| Primary | Sandy Lane Primary School | 1,205,536 | 240,530 | 191,224 | 15.9% | 0 | 7,868 | 199,092 |
| Primary | Shibden Head Primary Academy | 1,477,567 | 206,817 | 244,626 | 16.6% | 0 | 8,634 | 253,260 |
| Primary | Shipleigh CE Primary School | 876,269 | 160,653 | 139,538 | 15.9% | 0 | 18,617 | 158,156 |
| Primary | Shirley Manor Primary Academy | 955,739 | 226,321 | 150,767 | 15.8% | 0 | 13,112 | 163,879 |
| Primary | Silsden Primary School | 2,128,269 | 235,483 | 295,658 | 13.9% | 17,421 | 27,691 | 340,771 |
| Primary | Southmere Primary Academy | 1,726,175 | 597,413 | 328,550 | 19.0% | 0 | 27,621 | 356,170 |
| Primary | St Anne's Catholic Primary Academy | 986,324 | 222,188 | 173,485 | 17.6% | 0 | 9,193 | 182,678 |
| Primary | St Anthony's Catholic Primary School (Clayton) | 889,067 | 155,972 | 129,378 | 14.6% | 0 | 3,000 | 132,377 |
| Primary | St Anthony's Catholic Primary School (Shipleigh) | 612,565 | 93,418 | 78,013 | 12.7% | 12,043 | 11,999 | 102,055 |

| Column Reference (see key below) | | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
|----------------------------------|---|---|---------------------------|------------------------------|-----------------------------|---------------------------|-------------------------|---------------------------------|
| Phase | School | Total Formula Funding (ex. Rates & BSF) | Total AEN Formula Funding | Defined Notional SEND Budget | Notional SEND as a % of (1) | SEND Funding Floor (Sept) | SEND EHCP Top Up (Sept) | Total SEND Resource (3 + 5 + 6) |
| Primary | St Clare's Catholic Primary School | 973,867 | 237,660 | 164,814 | 16.9% | 0 | 16,778 | 181,592 |
| Primary | St Columba's Catholic Primary School | 1,653,650 | 439,095 | 295,370 | 17.9% | 0 | 9,096 | 304,466 |
| Primary | St Cuthbert & the First Martyrs' Catholic Primary | 873,733 | 179,409 | 123,038 | 14.1% | 14,733 | 30,008 | 167,778 |
| Primary | St Francis' Catholic Primary School | 849,510 | 117,876 | 114,957 | 13.5% | 0 | 15,116 | 130,073 |
| Primary | St James' Church Primary School | 1,323,182 | 388,574 | 248,549 | 18.8% | 0 | 17,806 | 266,355 |
| Primary | St John The Evangelist Catholic Primary | 851,764 | 147,699 | 133,950 | 15.7% | 0 | 0 | 133,950 |
| Primary | St John's CE Primary School | 1,748,092 | 398,221 | 282,791 | 16.2% | 0 | 8,548 | 291,339 |
| Primary | St Joseph's Catholic Primary School (Bingley) | 799,937 | 67,540 | 92,738 | 11.6% | 10,512 | 6,856 | 110,107 |
| Primary | St Joseph's Catholic Primary School (Bradford) | 1,370,220 | 374,803 | 232,851 | 17.0% | 0 | 15,316 | 248,168 |
| Primary | St Joseph's Catholic Primary, Keighley | 1,105,546 | 205,553 | 158,112 | 14.3% | 0 | 7,896 | 166,008 |
| Primary | St Luke's CE Primary School | 917,860 | 162,220 | 131,293 | 14.3% | 0 | 7,596 | 138,889 |
| Primary | St Mary's and St Peter's Catholic | 973,730 | 259,325 | 157,395 | 16.2% | 0 | 3,000 | 160,394 |
| Primary | St Matthew's Catholic Primary School | 987,844 | 247,255 | 176,132 | 17.8% | 0 | 25,352 | 201,484 |
| Primary | St Matthew's CE Primary School | 1,748,167 | 463,053 | 292,426 | 16.7% | 0 | 17,043 | 309,469 |
| Primary | St Oswald's CE Primary Academy | 1,661,974 | 503,710 | 311,012 | 18.7% | 0 | 10,833 | 321,845 |
| Primary | St Paul's CE Primary School | 878,640 | 151,267 | 129,070 | 14.7% | 0 | 8,496 | 137,566 |
| Primary | St Philip's CE Primary Academy | 928,473 | 252,995 | 165,792 | 17.9% | 0 | 4,597 | 170,388 |
| Primary | St Stephen's CE Primary School | 1,799,587 | 540,868 | 356,783 | 19.8% | 0 | 5,999 | 362,782 |
| Primary | St Walburga's Catholic Primary School | 825,931 | 82,695 | 96,711 | 11.7% | 9,291 | 21,504 | 127,506 |
| Primary | St William's Catholic Primary School | 859,332 | 230,850 | 156,315 | 18.2% | 1,553 | 4,597 | 162,464 |
| Primary | St Winefride's Catholic Primary | 1,584,485 | 284,781 | 249,854 | 15.8% | 0 | 8,596 | 258,450 |
| Primary | Stanbury Village School | 451,968 | 25,267 | 36,062 | 8.0% | 19,085 | 0 | 55,147 |
| Primary | Steeton Primary School | 1,161,884 | 205,205 | 193,030 | 16.6% | 0 | 20,952 | 213,982 |
| Primary | Stocks Lane Primary School | 658,655 | 87,133 | 88,753 | 13.5% | 22,456 | 24,191 | 135,400 |
| Primary | Swain House Primary School | 1,757,795 | 405,586 | 311,569 | 17.7% | 0 | 18,692 | 330,261 |
| Primary | Thackley Primary School | 1,477,993 | 168,623 | 196,941 | 13.3% | 0 | 2,080 | 199,021 |
| Primary | The Sacred Heart Catholic Primary Academy | 752,051 | 54,836 | 85,189 | 11.3% | 19,256 | 17,600 | 122,046 |
| Primary | Thornbury Primary Leadership Academy | 2,453,166 | 755,129 | 465,902 | 19.0% | 0 | 18,949 | 484,851 |
| Primary | Thornton Primary School | 2,146,151 | 443,432 | 378,787 | 17.6% | 0 | 34,581 | 413,368 |
| Primary | Thorpe Primary School | 891,647 | 176,306 | 138,934 | 15.6% | 0 | 4,597 | 143,530 |
| Primary | Trinity All Saints CE Primary School | 1,301,354 | 215,374 | 187,774 | 14.4% | 1,431 | 15,192 | 204,398 |
| Primary | Victoria Primary School | 1,142,188 | 289,442 | 205,113 | 18.0% | 0 | 8,560 | 213,674 |
| Primary | Wellington Primary School | 1,642,934 | 351,517 | 299,519 | 18.2% | 0 | 46,582 | 346,101 |
| Primary | Westbourne Primary School | 1,750,333 | 515,697 | 316,416 | 18.1% | 0 | 12,370 | 328,786 |
| Primary | Westminster CE Primary Academy | 2,571,250 | 795,029 | 519,942 | 20.2% | 0 | 22,475 | 542,417 |
| Primary | Whetley Primary Academy | 2,155,674 | 685,268 | 388,558 | 18.0% | 0 | 32,954 | 421,511 |
| Primary | Wibsey Primary School | 2,386,359 | 519,330 | 399,969 | 16.8% | 0 | 41,900 | 441,868 |
| Primary | Wilsden Primary School | 1,337,000 | 158,318 | 198,514 | 14.8% | 7,656 | 18,192 | 224,361 |
| Primary | Woodlands Primary Academy | 474,349 | 40,018 | 47,227 | 10.0% | 6,480 | 0 | 53,707 |
| Primary | Woodside Academy | 1,812,338 | 487,810 | 307,886 | 17.0% | 0 | 24,355 | 332,242 |
| Primary | Worth Valley Primary | 948,270 | 231,532 | 162,385 | 17.1% | 0 | 18,872 | 181,256 |
| Primary | Worthinghead Primary School | 871,966 | 130,174 | 102,607 | 11.8% | 1,204 | 11,999 | 115,809 |
| Primary | Wycliffe CE Primary School | 1,297,259 | 216,593 | 199,345 | 15.4% | 0 | 0 | 199,345 |
| Secondary | Beckfoot Academy | 6,576,000 | 732,388 | 763,498 | 11.6% | 0 | 68,687 | 832,185 |
| Secondary | Beckfoot Oakbank Academy | 7,149,272 | 1,623,325 | 1,097,822 | 15.4% | 0 | 35,724 | 1,133,546 |
| Secondary | Beckfoot Thornton Academy | 6,840,132 | 1,556,778 | 1,062,831 | 15.5% | 0 | 97,975 | 1,160,806 |
| Secondary | Beckfoot Upper Heaton Academy | 2,740,598 | 643,181 | 414,693 | 15.1% | 0 | 24,168 | 438,861 |
| Secondary | Belle Vue Girls' Academy | 5,160,028 | 1,221,604 | 762,275 | 14.8% | 0 | 58,795 | 821,070 |
| Secondary | Bingley Grammar School | 7,186,714 | 976,558 | 886,438 | 12.3% | 0 | 98,865 | 985,303 |
| Secondary | Bradford Forster Academy | 3,868,257 | 1,149,969 | 635,933 | 16.4% | 0 | 68,198 | 704,131 |
| Secondary | Buttershaw Business & Enterprise College | 7,128,087 | 1,694,665 | 1,054,905 | 14.8% | 0 | 70,750 | 1,125,656 |
| Secondary | Carlton Bolling College | 7,496,600 | 1,937,236 | 1,176,748 | 15.7% | 0 | 38,516 | 1,215,265 |
| Secondary | Dixons City Academy | 4,354,318 | 793,794 | 527,696 | 12.1% | 0 | 82,728 | 610,424 |
| Secondary | Dixons Cottingley Academy | 3,492,095 | 894,388 | 547,994 | 15.7% | 0 | 14,547 | 562,541 |
| Secondary | Dixons Kings Academy | 4,494,788 | 943,535 | 550,099 | 12.2% | 0 | 29,723 | 579,822 |
| Secondary | Dixons McMillan Academy | 2,854,810 | 526,692 | 340,397 | 11.9% | 0 | 41,110 | 381,507 |
| Secondary | Dixons Trinity Academy | 3,052,087 | 538,900 | 341,002 | 11.2% | 0 | 27,943 | 368,945 |
| Secondary | Feversham College | 3,601,768 | 752,501 | 453,590 | 12.6% | 0 | 36,322 | 489,911 |
| Secondary | Grange Technology College | 8,423,168 | 2,246,694 | 1,303,310 | 15.5% | 0 | 33,906 | 1,337,216 |
| Secondary | Hanson School | 6,855,282 | 1,670,504 | 1,091,653 | 15.9% | 0 | 45,086 | 1,136,739 |

| Column Reference (see key below) | | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
|----------------------------------|--|---|---------------------------|------------------------------|-----------------------------|---------------------------|-------------------------|---------------------------------|
| Phase | School | Total Formula Funding (ex. Rates & BSF) | Total AEN Formula Funding | Defined Notional SEND Budget | Notional SEND as a % of (1) | SEND Funding Floor (Sept) | SEND EHCP Top Up (Sept) | Total SEND Resource (3 + 5 + 6) |
| Secondary | Ilkley Grammar School | 6,187,200 | 398,416 | 604,417 | 9.8% | 8,051 | 90,401 | 702,869 |
| Secondary | Immanuel College Academy | 5,866,293 | 1,029,390 | 791,744 | 13.5% | 0 | 55,736 | 847,480 |
| Secondary | Laisterdyke Leadership Academy | 4,835,836 | 1,354,327 | 779,454 | 16.1% | 0 | 54,087 | 833,541 |
| Secondary | Oasis Academy Lister Park | 4,615,080 | 1,248,064 | 765,591 | 16.6% | 0 | 25,596 | 791,186 |
| Secondary | One In A Million (Free School) | 2,054,896 | 561,036 | 329,934 | 16.1% | 623 | 31,775 | 362,332 |
| Secondary | Parkside School | 4,375,149 | 609,504 | 576,863 | 13.2% | 0 | 77,680 | 654,542 |
| Secondary | Queensbury Academy | 4,652,078 | 918,709 | 649,503 | 14.0% | 0 | 60,637 | 710,140 |
| Secondary | St Bede's & St Joseph's Catholic College | 7,864,327 | 1,442,357 | 1,020,459 | 13.0% | 0 | 63,328 | 1,083,788 |
| Secondary | The Holy Family Catholic School | 4,168,568 | 868,162 | 635,821 | 15.3% | 0 | 59,362 | 695,183 |
| Secondary | Titus Salt School | 6,338,099 | 1,191,227 | 930,849 | 14.7% | 0 | 123,945 | 1,054,794 |
| Secondary | Tong Leadership Academy | 5,677,695 | 1,635,577 | 930,119 | 16.4% | 0 | 28,762 | 958,881 |
| Secondary | University Academy Keighley | 3,704,950 | 822,686 | 552,474 | 14.9% | 0 | 80,878 | 633,351 |
| Total / Average | | 402,197,086 | 90,046,664 | 62,948,995 | 15.7% | 481,376 | 5,107,092 | 68,537,463 |
| Primary Phase Average (mean) | | 224,243,058 | 51,765,682 | 37,329,918 | 16.6% | 472,702 | 3,057,074 | 40,859,694 |
| Secondary Phase Average (mean) | | 151,614,178 | 31,982,168 | 21,578,111 | 14.2% | 8,674 | 1,625,230 | 23,212,014 |

Key to Columns

| | |
|---|--|
| 1 | The Local Authority's calculated 2018/19 financial year allocation. This is the same as column 2 in Appendix 1. |
| 2 | The total amount of formula funding (column 1) allocated via Additional Educational Needs Factors 2018/19. * |
| 3 | The Local Authority's calculated notional SEND budget 2018/19. How this is calculated is described in Appendix 3. |
| 4 | Notional SEND as a % of total formula funding 2018/19 (column 3 divided by column 1). |
| 5 | The value of the SEND Floor allocations in 2018/19 (at September 2018). How these are calculated is described in Appendix 3. |
| 6 | The value top up funding (element 3) for pupils with EHCPs in 2018/19 (at September 2018). |
| 7 | The total of resources allocated to schools in support of SEND (column 3 + column 5 + column 6). |

* Additional Educational Needs Factors are:

Free School Meals (Flat)

Free School Meals (Ever 6)

Index of Multiple Deprivation (IDACI)

Low Prior Attainment

English as an Additional Language (EAL)

Pupil Mobility

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 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 2019/20 financial year.

Date (s) of any Previous Discussion at the Forum

Our EYSFF autumn 2017 consultation was presented to the Schools Forum on 18 October 2017. An update on the current position, and a summary of developing proposals for 2019/20, was presented to the Schools Forum at the last meeting held on 19 September 2018.

Background / Context

At the Schools Forum meeting 19 September 2018 it was reported that a further £1.22m of balances is available ring-fenced for the Early Years Block (£2.75m rather than the £1.52m estimated in the January 2018 reports). This is the result of differences in free entitlement numbers.

Entitlement delivery changes – the development of the extended 30 hours entitlement for 3&4 year olds - 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 (a £0.6m gain to Bradford on January 2016 numbers), with the rate of funding per hour for providers having increased from £4.83 to £5.20.
- A substantial (10%) reduction in funding for the 3 and 4 year old offer (a £3.01m loss to Bradford on January 2016 numbers). 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, which is currently only guaranteed to the end of 2019/20.

Details of the Item for Consideration

The attached 2 appendices set out in detail the proposed Early Years Single Funding Formula in Bradford for the 2019/20 financial year.

Appendix 1 is our full consultation and information document, which includes the Technical Statement, delivery timetable and a responses questionnaire.

Appendix 2 provides sight of indicative rates of funding for providers for the 3 and 4 year old offer and how these compare against 2018/19 rates.

Forum Members are not asked to make final recommendations on the EYSFF for 2019/20 at this meeting. Members are asked to approve the publication of the documentation for consultation. The Forum will be asked to review responses to this consultation in December prior to making final recommendations on the EYSFF in January 2019.

The principles on which we have developed proposals for 2019/20 were established in our response to the DfE's implementation of Early Years National Funding Formula reform at April 2017. The key guiding principle for 2019/20 is to guard against moving too far away from what we have agreed and set out for providers previously, on the basis that providers have used this information to inform their business planning.

Key aspects of the 2019/20 proposals are highlighted in the introduction in Appendix 1. To pull out some of the more specific aspects for the Forum's awareness, focusing on what the proposals mean for the Early Years Block and the DSG:

Details of the Item for Consideration (continued)

- We continue the policy of ring-fencing of the Early Years Block. Within the Early Years Block however, we are clearer about the split of funding between the 2 year old and the 3 and 4 year old entitlements. This specifically comes into play when looking at the financing of SEND Early Years Inclusion funding. We are holding the £2.75m brought forward from 2017/18 specifically to support the cost of the EYSFF in 2019/20. However, we do not expect to spend all this reserve in 2019/20. On current modelling, we anticipate c. £1.0m of reserve will be used in 2019/20.
- Settings will continue to be funded for the 2 year old entitlement on a single flat rate per hour with no additional supplements. In 2018/19 this rate was £5.20 and we expect this to be the rate funded in 2019/20. Where the decision is taken to continue 2 year old access to SEND Early Years Inclusion funding however, the value of the funding rate passed to settings for the 2 year old entitlement after 2019/20 will be reduced to cover the cost of the inclusion spending. For example, a budget of £100,000, on current numbers, would mean that the £5.20 per hour DSG funding rate in 2020/21 would be reduced by £0.06 to £5.14. To be clear, this reduction will not take place in 2019/20 as we will use a proportion of the £2.75m brought forward to fund this. However, where 2 year olds continue to access inclusion funds after 2019/20, the value of the single flat rate will be reduced to cover the on-going cost.
- We have now established a 'universal base rate' for the 3 & 4 year old entitlement, as required by the DfE, with this overridden in 2019/20 for nursery schools via the allocation of the specific MNS factor. This means that that the total funding rates for each nursery school (both base and deprivation rates) will continue to be retained at their 2016/17 values. We also continue the nursery school lump sum sustainability supplement, using the current methodology, continuing to bring in the 30 hours extended entitlement into the calculation. On current information, awaiting further announcement from the DfE, 2019/20 is the final year of this MNS protection.
- 2019/20 is the third and final year in the strategy we set out in autumn 2016 for the protection of 3&4 year old base rates for PVI providers and nursery classes. We will complete this strategy. Meaning:
 - We will allocate one off reserve monies brought forward within the Early Years Block to uplift the universal base rate for 3 & 4 year olds in 2019/20 to £4.11 per hour. £4.11 is the value in 2019/20 we set out in our autumn 2016 consultation. This will be the base rate for the 3 & 4 year old entitlement allocated for all PVI providers as well as all nursery classes in primary schools and academies.
 - We will continue our current deprivation supplement within the 3&4 year old EYSFF in 2019/20, calculated at 9.5% of EYSFF spending (excluding one off monies). Deprivation rates will reduce slightly in 2019/20 on a general basis because the overall EYSFF funding envelope is reducing due to the impact of national reform (the DSG funded Early Years Block rate is reduced from £4.59 to £4.57).
 - We will not introduce any further supplements into the 3 & 4 year old EYSFF in 2019/20.
- Regarding SEND Inclusion:
 - SEND Early Years Inclusion monies will continue to be 100% funded from within the Early Years Block. A budget of £800,000 has been held in 2018/19. We will consult in more detail with the Schools Forum on the value of budget required for 2019/20. We current anticipate needing a budget in the region of £1.70m.
 - We are seeking to implement for (or during) 2019/20 a more holistic SEND inclusion fund approach for 2, 3&4 year olds, which will apply to all providers.
 - We are seeking to pilot the proposed new holistic model for schools and classes during the autumn and, subject to the outcomes of this consultation, bring PVI providers, schools and classes together under the new model from either April 2019 or September 2019. We will continue to operate the existing 'EYIP' inclusion model for PVI providers until the new model is introduced. Any allocations that have been agreed under the current model that extend beyond the introduction of the new model would be funded until these expire.
- We will have more detailed conversations with the Schools Forum, leading up to final decisions to be taken in January 2019, about the Early Years Block increasing its contribution to the cost of support for high needs early years aged children. These conversations focus on the extent to which the costs of centrally managed SEND support services for early years aged children, currently funded by the High Needs Block, are charged to the Early Years Block going forward. Local authorities are required to 'pass through' to providers at least 95% of the 3&4 year old Early Years Block funding. Allowing for the impact of one off monies, our pass through rate in 2017/18 was 99%. Benchmarking based on 2017/18 indicates that the national average pass through rate was 96% and the average of our statistical neighbours was 97%. We know that other local authorities charge their Early Years Blocks for the cost of SEND support services for early years aged children.

Details of the Item for Consideration (continued)

The outcomes of these conversations will not affect the proposals for the values of provider funding rates in 2019/20. The outcomes however, may / are likely to / will directly affect how our EYSFF develops after 2019/20.

- There is significant further discussion required, and development work to take place, on how our EYSFF, and the values of funding rates, adjust and develop from April 2020. There are a number of factors that will influence how our EYSFF develops.

The modelling in Appendix 2 shows, indicatively, the changes in rates of funding for the 3&4 year old entitlements in 2018/19. This modelling illustrates:

- The rates of funding for nursery schools continue to be protected on a 'cash flat' basis.
- As the value of base rate funding for nursery classes and PVI providers reduces from £4.12 in 2018/19 to £4.11 in 2019/20 was previously close to £4.12
- There is a small overall reduction in deprivation rates, due to the reduction in DSG level funding per from the DfE from £4.59 in 2018/19 to £4.57 in 2019/20.

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

Direct implications – as outlined.

Recommendations

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

List of Supporting Appendices / Papers (where applicable)

Appendix 1 – Consultation – Bradford District's Early Years Single Funding Formula 2019/20 (including Technical Statement and responses questionnaire).
Appendix 2a – Indicative 2019/20 modelling – Nursery Schools
Appendix 2b – Indicative 2019/20 modelling – Nursery Classes
Appendix 2c – Indicative 2019/20 modelling – PVI Providers

Contact Officer (name, telephone number and email address)

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Consultation - Bradford District's Early Years Single Funding Formula 2019/20

APPENDIX 2 (EY SEND Inclusion) still to be attached

1) Introduction

1.1 Attached with this introduction is the full Technical Statement, which sets out the methodology and timetable proposed for the calculation of funding allocations for individual providers delivering the 2, 3 and 4 year old entitlements in 2019/20. **A summary of our proposals is given in paragraph 1.5 below.**

1.2 Our proposed approach for 2019/20 continues to incorporate our response to the changes set out by Government in 2016 in its consultation on national formula and early years funding reform, which can be accessed [here](#). Our proposals for 2019/20 effectively complete what we set out for providers initially in our consultation in autumn 2016 and what we began to implement at April 2017.

1.3 As we set out in autumn 2016, and again in autumn 2017, the most significant 'directed' change resulting from the DfE's national reform is the reduction in the value of the Setting Base Rate allocated in Bradford for the delivery of the 3 and 4 year old universal and extended entitlements. The base funding rate for Maintained Nursery Schools however, remains protected in 2019/20, but only because the DfE has allocated specific monies into the DSG Early Years Block to enable this.

1.4 **Please note that the values of funding rates quoted in this consultation document, including the Setting Base Rates, are currently indicative and should be viewed as such. These indicative rates are highlighted in yellow.** It is expected that final rates of funding for 2019/20 will be confirmed following the Schools Forum meeting on 9 January 2019. The rates presented in this document however, do represent what we aim to fund in 2019/20 and therefore, do give providers a basis on which to plan.

1.5 We have developed our proposed approach for 2019/20 on the basis that:

- We will continue the policy of ring-fencing of the Early Years Block. Within the Early Years Block however, we will be clearer about the split of funding between the 2 year old and the 3 and 4 year old entitlements. This specifically comes into play when looking at the financing of SEND Early Years Inclusion funding. This is explained further below.
- We will continue our current termly headcount methodology (and 2nd headcount for the 2 year old offer). We do not currently plan to revisit our proposals that we made last year to move to a monthly counting methodology.
- We will continue our simplified processes for PVI providers, which include no longer publishing a 'hard copy' pre-calculated Confirmed Indicative Budget in March 2019. Instead, we will begin payments in April 2019 based on the latest confirmed position and we will enable providers to use a ready reckoner to estimate funding. The Authority will continue to develop the Bradford Provider Gateway and will continue to talk to PVI providers about how information submitted through the Gateway can feed into the payments system so that initial payments are made on the latest information.
- Our Early Years Single Funding Formula will continue to pass through to providers 100% of the DSG funding rate for the Early Years Pupil Premium (currently **£0.53** per hour) and the Disability Access Fund (currently **£615** per year).
- Settings will continue to be funded for the 2 year old entitlement on a single flat rate per hour with no additional supplements. In 2018/19 this rate was **£5.20** and we expect this to be the rate funded in 2019/20. Where the decision is taken to continue 2 year old access to SEND Early Years Inclusion funding however, the value of the funding rate passed to settings for the 2 year old entitlement after 2019/20 will be reduced to cover the cost of the inclusion spending. For example, a budget of £100,000, on current numbers, would mean that the £5.20 per hour DSG funding rate in 2020/21 would be reduced by £0.06 to £5.14. To be clear, this reduction will not take place in 2019/20. However, where 2

year olds continue to access inclusion funds after 2019/20, the value of the single flat rate will be reduced to cover the cost.

- We have now established a 'universal base rate' for the 3 & 4 year old entitlement, as required by the DfE, with this overridden in 2019/20 for nursery schools via the allocation of the specific MNS factor. This means that that the total funding rates for each nursery school (both base and deprivation rates) will continue to be retained at their 2016/17 values. We will also continue the nursery school lump sum sustainability supplement, using the current methodology, and continuing to bring in the 30 hours extended entitlement into the calculation. On current information, awaiting further announcement from the DfE, 2019/20 is the final year of this protection.
- 2019/20 is the third and final year of the strategy we set out in autumn 2016 for the protection of the value of base rates for PVI providers and nursery classes. We propose to complete this strategy. Meaning:
 - We will allocate one off reserve monies brought forward within the Early Years Block to uplift the universal base rate for 3 & 4 year olds in 2019/20 to £4.11 per hour. £4.11 is the value we set out in our autumn 2016 consultation. This will be the base rate for the 3 & 4 year old entitlement allocated in 2019/20 for all PVI providers as well as all nursery classes in primary schools and academies.
 - We will continue our current deprivation supplement within the 3&4 year old EYSFF in 2019/20, calculated at 9.5% of EYSFF (excluding one off monies). Deprivation rates will reduce slightly in 2019/20 on a general basis because the overall EYSFF funding envelope is reducing due to the impact of national reform (the DSG funded Early Years Block rate is reduced from £4.59 to £4.57).
 - We will not introduce any further supplements into the 3 & 4 year old EYSFF in 2019/20.
 - There is significant further discussion required, and development work to take place, on how our EYSFF, and the values of funding rates, adjust and develop from April 2020. Please see paragraph 2 below.
- Regarding SEND Inclusion:
 - SEND Early Years Inclusion monies will continue to be 100% funded from within the Early Years Block. A budget of £800,000 has been held in 2018/19. We will consult in more detail with the Schools Forum on the value of budget required for 2019/20.
 - We are seeking to implement during 2019/20 a more holistic SEND inclusion fund approach for 2, 3&4 year olds, which will apply to all providers. Our proposal for this holistic approach is set out in detail in Appendix 2 at the back of this document. This is a proposal that we specifically would like feedback on. The holistic approach represents a change from what PVI providers have previously accessed (known as 'EYIP' funds).
 - We are seeking to pilot the proposed new holistic model for schools and classes and, subject to the outcomes of this consultation, bring PVI providers, schools and classes together under the new model from either April 2019 or September 2019. We will continue to operate the existing 'EYIP' inclusion model for PVI providers until the new model is introduced. Any allocations that have been agreed under the current model that extend beyond the introduction of the new model would be funded until these expire.
- We will have more detailed conversations with the Schools Forum, and the Early Years Working Group, leading up to final decisions to be taken in January 2019, about the Early Years Block increasing its contribution to the cost of support for high needs early years aged children. These conversations focus on the extent to which the costs of centrally managed SEND support services for early years aged children, currently funded by the High Needs Block, are charged to the Early Years Block going forward. Local authorities are required to 'pass through' to providers at least 95% of the 3&4 year old Early Years Block funding. Allowing for the impact of one off monies, our pass through rate in 2017/18 was 99%. Benchmarking based on 2017/18 indicates that the national average pass through rate was 96%

and the average of our statistical neighbours was 97%. We know that other local authorities charge their Early Years Blocks for the cost of SEND support services for early years aged children. The outcomes of these conversations will not affect the proposals that are set out above for the values of provider funding rates in 2019/20. The outcomes however, may / are likely to / will directly affect how our EYSFF develops after 2019/20. Please see paragraph 2 below.

1.6 Please use the responses form attached at the end of this document to submit your views on the proposals outlined in the consultation. We especially would like to collect feedback on the proposals for a holistic early years SEND inclusion fund. There is space on this form for you to comment on any aspect of the proposals. If you wish to discuss these proposals in more detail, or have any specific questions, please contact either Andrew Redding andrew.redding@bradford.gov.uk 01274 432678, Susan Krupinski susan.krupinski@bradford.gov.uk 01274 43173 or Jaclyn McManus jaclyn.mcmanus@bradford.gov.uk 01274 431965.

1.7 Please ensure that your response is submitted by the deadline of **Friday 30 November 2018**. Any responses received after this deadline date will not be included in the overall analysis presented to the Schools Forum.

1.8 It is anticipated that the Schools Forum will make its final recommendations on 2019/20 arrangements on Wednesday 9 January 2019. A confirmed Technical Statement, giving sight of the final Early Years Single Funding Formula, and rates of funding, for the 2019/20 financial year will be published very shortly after this meeting.

2) Future Direction of the EYSFF from April 2020

2.1 As explained in the introduction, 2019/20 is the final year of our 3 year Early Years Block DSG strategy that we initially set out in autumn 2016 in response to the DfE's national early years funding reform.

2.2 Our strategy has included the allocation of reserves brought forward within the Early Years Block intended to soften the reduction in 3&4 year old base rate funding for PVI providers and primary classes that has come from the national reform. Our 3&4 year old EYSFF base rates in 2018/19, without one off monies, would be £4.03 per hour rather than the £4.12 we have set.

2.3 Our strategy has also included the reduction in the proportion of the 3&4 year old EYSFF that is allocated via our deprivation and SEND supplement, although to a greater extent this was forced by the DfE's restriction that supplements within the 3&4 year old EYSFF (of which deprivation is one) cannot allocate more than 10% of funds. Prior to April 2017, we had allocated 14% of our 3&4 year old EYSFF through our deprivation & SEND supplement. We reduced this to 9.5% (excluding one off monies) in 2017/18.

2.4 There are wider DSG 'national funding formula' system changes on the horizon, which the Authority will need to manage in consultation with the Schools Forum. There continues to be uncertainty about the speed of progress of these changes. The DfE has recently stated that national funding formula policy direction, and the monies available for education and schools nationally, cannot be set out until after the autumn 2019 spending review. This level of uncertainty is difficult. In particular, we remain unclear about the future policy direction of early years funding, including whether nursery schools will be protected after 2019/20.

2.5 Therefore, we are currently unsure of the rates of funding we will be able to set for providers after April 2020. The Authority has begun to review the options for our EYSFF funding from April 2020. This review will need to take account of the following as these become clearer *over the next 12 months*:

- Any further directed changes or additional restrictions from the DfE on the operation of the EYSFF.
- The specific outcomes of the DfE's consultation on the future funding of nursery schools. This consultation is still to be published. The supplement, which is used to protect the funding rates of nursery schools, is only currently committed by the DfE to the end of 2019/20. If this supplement does not continue, we are unlikely to be in a position to sustain current levels of funding for nursery schools.

- The position of the High Needs Block and the relative responsibilities (between the High Needs Block and the Early Years Block) for the funding of centrally managed support services for high needs children in early years settings. The extent which the Early Years Block contributes more to these costs.
- The impact of our holistic early years SEND inclusion fund and the role that this has in supporting providers. The impact that access by 2 year olds to these inclusion funds has.
- That, under the current EYSFF construction, where we continue to spend 9.5% of our EYSFF for 3 & 4 year olds on the deprivation & SEND supplement, the 3 & 4 year old setting base rate could be set lower than £4.00 per hour going forward. Without the further allocation of reserves (as these may no longer be available), the value of the base rate could be uplifted above £4.00 by reducing the proportion of the EYSFF spent on the deprivation & SEND supplement. However, this will mean lower rates of funding for settings that support children from more deprived backgrounds and may have consequences for support and outcomes for these children as well as direct consequences for cost pressure on SEND inclusion funding. The options for the 3 & 4 year old base rate going forward require very close consideration. However, our early analysis suggests that we may not be able to retain our deprivation & SEND supplement rates at current levels going forward after April 2020 and we wish to give settings early warning of this. For reference, benchmarking based on 2017/18 indicates that the national average spend on deprivation supplements was 5% and the average of our statistical neighbours was 6% compared with our 9.5%.

2.6 The Authority will work with the Early Years Working Group on these issues and will seek to publish information / a consultation as early as it is practical to do so (in summer 2019). This timetable will be influenced significantly by when the DfE releases further information on funding national funding policy direction.

(DRAFT VERSION FOR CONSULTATION OCTOBER 2018)

PLEASE NOTE THAT THIS TECHNICAL STATEMENT IS WRITTEN ON THE RECOMMENDATIONS FOR THE 2019/20 FINANCIAL YEAR BUDGET MADE BY BRADFORD SCHOOLS FORUM AT ITS MEETING ON 9 JANUARY 2019. A FINAL DECISION ON THESE RECOMMENDATIONS WILL BE TAKEN BY COUNCIL ON 21 FEBRUARY 2019

INTRODUCTION AND SUMMARY

1) The Basic Early Years Single Funding Formula (EYSFF) for the 3 and 4 year olds universal and extended entitlement in 2019/20 is proposed as follows:

$(a + b + c) \times d + e = \text{Total EYSFF Funding 2019/20}$

a) Universal Base Rate (£ per child per hour)

b) Provider Deprivation & SEN Rate (£ per child per hour)

c) Base Rate Protection (Nursery Schools only) (£ per child per hour)

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

d) No. of Entitlement Hours delivered at the provider (per year)

e) Lump Sum Funding for Sustainability (Nursery Schools only)

For example, on the simple basis that all children at a PVI provider or in a primary school nursery class access 15 hours entitlement per week for 38 weeks per year, funding using the EYSFF in 2019/20 will look like:

a) Universal Base Rate

£4.11

b) Provider Deprivation & SEN Rate

£0.30

** Example Rate Only

The provider's funding rate per hour = (£4.11 + £0.30) = £4.41

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

| | Children | Hours Delivered |
|-----------------|-----------------|------------------------|
| i Summer Term | 78 | 14,040 |
| ii Autumn Term | 62 | 13,020 |
| iii Spring Term | 70 | 12,600 |

Sub Total EYSFF Funding = £4.41 x 39,660 = £175,297

2) The Basic Early Years Single Funding Formula (EYSFF) for the extended 30 hours entitlement for eligible 3 & 4 Year Olds is proposed to operate within the same framework as the universal 15 hours entitlement as set out in this Technical Statement.

Rates of funding, timetabling and counting arrangements are the same. Specific guidance about the funding of the 30 hours entitlement, where necessary, is incorporated into this Statement.

Question 1 – Do you agree with the proposal to retain the existing framework, timetabling and counting arrangements for the operation of the EYSFF in 2019/20? If not, please can you explain why not.

Question 2 – Do you have any comments on how we could improve our proposed arrangements, including where our guidance could be clearer?

3) The 2 year old entitlement in 2019/20 is proposed to continue to be funded via a simple flat rate per child per hour for all providers. The value of rate for all providers is set at **£5.20.**

The timetabling and counting arrangements for the funding of the 2 year old entitlement are the same as for the 3 and 4 year old entitlement. Specific guidance about the funding of the 2 year old entitlement, where necessary, is incorporated into this Statement. A 2nd headcount per term continues in 2019/20.

Question 3 – 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 2018/19 was £5.20 per hour)? If not, please can you explain why not.

4) Following the feedback received in the consultation we conducted in autumn 2017, we chose not to move to a monthly ‘starters and leavers’ counting arrangement. This remains our position. Therefore, the current termly headcount methodology is proposed to be retained in 2019/20.

5) We have established a Universal Base Rate for the 3 and 4 year old entitlements.

A Universal Base Rate for the funding of the 3 and 4 year old entitlement is a requirement of the DfE’s national early years funding reform.

We developed, and consulted on, the principles on which our 2019/20 EYSFF is based in our initial response to the DfE’s reform in 2016. In autumn 2016, we set out our intention to adopt new arrangements under the protection afforded by the use of brought forward balances within the Early Years Block for 3 financial years. A subsequent key guiding principle has been to guard against moving away from what we agreed and set out in our autumn 2016 consultation, recognising that providers have used this information to inform their business planning.

Below are the rates of funding for 2019/20 we forecasted and published within the autumn 2016 consultation:

| ESTIMATED Rate Per Hour | 2016/17 | 2017/18 | 2018/19 | 2019/20 |
|---------------------------------------|----------------|----------------|----------------|----------------|
| 2 YO Offer - Universal Base Rate | £4.83 | £5.20 | £5.20 | £5.20 |
| 3 & 4 Year Old Entitlement | | | | |
| Provider Base Rate – Nursery Schools | £5.70 | £5.45 | £4.12 | £4.11 |
| Provider Base Rate – Nursery Classes | £4.13 | £4.11 | £4.11 | £4.11 |
| Provider Base Rate – PVI Providers | £4.62 | £4.62 | £4.12 | £4.11 |
| Mean Deprivation & SEN Rate | £0.68 | £0.50 | £0.49 | £0.47 |
| Nursery Schools Supplement | £1.07 | £1.87 | £3.16 | £3.18 |
| Looked After Children Additional | £1.75 | | | |
| Early Years Pupil Premium | £0.53 | £0.53 | £0.53 | £0.53 |

So, in 2019/20, there will be a single Universal Base Rate per hour for the 3 and 4 year old entitlements. The value of this is **£4.11** per hour. All providers will be funded on this starting Base Rate. Maintained Nursery Schools then receive an additional amount, funded from the DfE’s specific Maintained Nursery School Supplement, to bring the Base Rate for Maintained Nursery Schools up to £5.70 per hour, which is the value of their Base Rate in 2016/17 prior to the implementation of the DfE’s national formula reform.

Question 4 – Do you agree with the proposal to set the value of the 3&4 year old universal base rate in 2019/20 at £4.11 i.e. at the value that was published in the Authority’s consultation in autumn 2016? If not, please can you explain why not.

Question 5 – Do you have any comments on this estimated universal base rate value?

Question 6 – Do you agree with the proposal to continue our current Deprivation & SEND supplement factor in 2019/20 set to allocate 9.5% of the EYSFF? If not, please can you explain why not.

Question 7 – Do you agree with the proposal not to add any further supplements into the Early Years Single Funding Formula in 2019/20? If not, please can you explain why not.

6) One off funding (brought forward balances within the Early Years Block) is allocated to enhance the values of the provider Base Rates for the 2, 3 and 4 year old universal and extended entitlements in 2019/20, which is not currently planned to continue after April 2020.

Without the allocation of one off monies, the base rate for the 2 year old entitlement would be reduced from **£5.20** per hour to £5.14 per hour, assuming the continued access of 2 year olds to early years SEND inclusions funds requiring a budget of £100,000.

Without the allocation of one off monies, the base rate for the 3&4 year old entitlements would be reduced from **£4.11** per hour to c. £4.00 per hour.

The extent to which the value of base rate for the 3&4 year old entitlement can be maintained at an ‘enhanced’ level after 1 April 2020 is subject to a number of considerations, including:

- The value of any brought forward balance within the Early Year Years Block that can be re-allocated on a time-limited basis going forward.
- The proportion of the 3&4 year old EYSFF that is allocated through our deprivation and SEND supplement. A decrease from the current 9.5% proportion would release more funding to support a higher level of base rate.
- Whether we see value in adding additional supplements that are permitted in the 3&4 year old EYSFF. Additional supplements will reduce the funding available for the base rate.
- The cost of the early years SEND inclusion fund, which is fully funded from the Early Years Block.
- The value of the charge to the Early Years Block for the cost of support services for early years aged high needs children.

7) The Authority is seeking to implement a more holistic SEND inclusion fund approach for 2, 3&4 year olds, which will apply to all providers.

Our proposal for this holistic approach is set out in detail in Appendix 2 at the back of this document. This is a proposal that we specifically would like feedback on. The holistic approach represents a change from what PVI providers have previously accessed (known as ‘EYIP’ funds).

We are seeking to pilot the proposed new holistic model for schools and classes from the start of the spring 2019 term and, subject to the outcomes of this consultation, bring PVI providers, schools and classes together under the new model from either April 2019 or September 2019. We will continue to operate the

existing 'EYIP' inclusion model for PVI providers until the new model is introduced. Any allocations that have been agreed under the current model that extend beyond the introduction of the new model would be funded until these expire.

SEND Early Years Inclusion monies will continue to be 100% funded from within the Early Years Block. A budget of £800,000 has been held in 2018/19. We will consult in more detail with the Schools Forum on the value of budget required for 2019/20.

Question 8 – Do you agree with the Authority's proposals for a holistic early years SEND inclusion fund (set out in Appendix 2)? If not, please can you explain why not.

8) Funding is allocated in addition to the basic Early Years Single Funding Formula for 3 purposes, which are explained further in this Statement:

- Early Years Pupil Premium
- Disability Access Fund
- Early Years SEND Inclusion

Question 9 – Are there any changes that you would like to see made to the Early Years Single Funding Formula in 2019/20 that have not been proposed?

Question 10 – Do you have any other comments that you have not made elsewhere in your response, including matters that you would wish to be included in the Authority's review of the EYSFF for 2020/21?

a) There is now a single Universal Base Rate per hour for the 3 and 4 year old entitlements. In 2019/20 the value of this is £4.11

- The Base Rate is expressed as a value of funding per child per hour.
- It is made up of £4.00 of on-going Early Years Block DSG funding and £0.11 of one off monies, which is funded from Early Years Block brought forward balances.
- All providers are funded on this starting Base Rate. Maintained Nursery Schools then receive an additional amount, from the DfE's specific Maintained Nursery School Supplement, to bring the Base Rate for Maintained Nursery Schools up to £5.70 per hour, which is the value of their Base Rate in 2016/17 prior to the implementation of the DfE's national formula reform.
- The Universal Base Rate is used to fund both the universal 15 hours entitlement and the additional extended 15 hours entitlement, up to a maximum of 30 hours per child, for eligible children.
- The Universal Base Rate is fixed and will not change during 2019/20. It is fixed at the point the 1st draft of Indicative Budgets are published, which for 2019/20 is in February 2019. Please see the timetable.
- For Primary schools and academies with Nursery classes, funding allocated to support whole school costs remains fully within the Primary sector funding formula (e.g. business rates).

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

- All Local Authorities are required by the Department for Education (DfE) to have a deprivation factor within their EYSFF. This funding is allocated, in addition to the Base Rates, specifically to:
 - Support raising the educational outcomes and life chances of children from more deprived backgrounds
 - Support the reduction of the attainment gap that currently exists between children from more deprived and children from more affluent backgrounds
 - Support providers for the additional costs associated with the delivery of the entitlement to children from more deprived backgrounds and to children that have additional lower level educational needs (Early Years Action, Early Years Action +).
 - Please note that this funding does not replace the provision and processes in place within the Bradford District to support children with higher level special educational needs.
- As with the Base Rate:
 - A provider's 'Deprivation & SEND Rate' is expressed as a value per child per hour,
 - These rates are fixed at the point the 1st draft of Indicative Budgets are published, which for 2019/20 is in February 2019. They will not change during 2019/20.
 - All 3 and 4 year old entitlement hours, including the extended 30 hours, delivered at a provider are funded at the same Deprivation and SEN Rate.
 - The DfE's Maintained Nursery Schools Supplement is allocated to maintain each Maintained Nursery School's 'Deprivation and SEN Rate' at the 2016/17 value.
- Unlike the Base Rate, Deprivation and SEND Rates vary according to the measured level of deprivation of children attending each provider. Each provider's Deprivation and SEN Rate is calculated using the Index of Multiple Deprivation and the postcodes of children taking up the entitlement at the provider, recorded in the January 2019, January 2018 and January 2017 censuses (3 year rolling average). Because of the time lag in data, the Local Authority appreciates that using this approach may produce some anomalous funding results, especially for smaller providers. We keep this approach under review.
- Rates of funding have been calculated, based on the estimates of funded hours delivered used to calculate the Indicative Budgets, using the Index of Multiple Deprivation (IMD) scores linked to

individual children's postcodes. Where this data for an individual provider cannot be properly determined or is not available, and for providers that newly establish during the year, the provider's deprivation rate will be calculated using the average IMD scores for all providers of this type. This is especially applicable for Childminders.

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

- Each provider's no. of funded entitlement hours delivered for the 2019/20 financial year is the sum of:
 - Summer term (beginning 1 April 2019): the total of entitlement hours delivered per week recorded in the census taken on 16 May 2019, x 12 weeks
 - Autumn term (beginning 1 September 2019): the total of entitlement hours delivered per week recorded in the census taken on 3 October 2019, x 14 weeks.
 - Spring term (beginning 1 January 2020): the total of entitlement hours delivered per week recorded in the census taken on 16 January 2020, x 12 weeks.
- 'Hours delivered' are the entitlement hours a child is registered to take at that provider, taken from the contracts signed with parents for that term. 'Hours delivered' is not affected by the actual attendance of children at the time the censuses are taken.
- The dates for the censuses are the same for schools, classes and PVI provider. The dates are those set by the DfE for the school termly censuses. One of the reasons for this is so that the census data for each provider can be cross checked to identify duplicate children.
- For maintained schools and academies, the entitlement hours information will be taken by the Local Authority from the data recorded in the "funded hours" field in the censuses, which schools submit to the DfE via the COLLECT website. PVI providers will be required, as is the process now, to submit their information through the Bradford Provider Gateway.
- Adjustments will be made to the funding of providers that open or close (or cease to deliver entitlement hours) mid-term, to reflect the proportion of the term applicable.
- No adjustment will automatically be made to funded entitlement hours for starters or leavers after the census date in each term. However, exceptional circumstances can be considered where a provider admits a significant number of children after the census has been taken that term.
- An adjustment to funded hours delivered may be made specifically for the autumn term only, recognising that in this term the intake of children into nursery provision is often staggered into schools and classes and that eligible children may start the term at a PVI provider and then move to a school or class before the October census. Where a child started the autumn term at a PVI provider and has moved to a school or class prior to the October census, an adjustment may be made to split the funding for the autumn term, based on the number of weeks that a child has attended each provider. This adjustment applies for the autumn term only.
- For the purposes of calculating Indicative Budgets for maintained schools and academies (Indicative Budgets will not be published for PVI providers, who will have access to a ready reckoner instead) before the start of the financial year, estimates of the funded entitlement hours that will be recorded in each of the censuses will be used.
- The Authority reserves the right to make adjustments to estimates (and to initial payments), or not to make any payment, where the information submitted by providers is demonstrably incorrect or is missing.

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

- The EYSFF for 3 and 4 year olds will only allocate funding for children in providers that are accessing the entitlement from the term after their 3rd birthday. The 1 September, 1 January and 1 April are taken as start dates for each of the terms. The offer has been extended to eligible 2 year olds, but this does not mean all children accessing provision under aged 3 are eligible for EYSFF funding.
- The maximum number of hours any child will be funded for, for the period 1 April 2019 to 31 March 2020, for the universal entitlement is 15 hours per week (for 38 weeks) or the annual equivalent of this total. This is the same for any child regardless of their age, so a four or five year old child staying in nursery (rather than starting Reception) will only be funded for the maximum on this basis, unless they are eligible for the extended 30 hours or they are continued to be placed at the request of the Local Authority (e.g. children with SEND).
- Some children will be entitled to 30 hours per week (for 38 weeks per year) and, for these children, 30 hours x 38 weeks is the maximum number of hours that will be funded by the EYSFF between 1 April 2019 and 31 March 2020.
- Although a child can take up their entitlement over two providers, the maximum universal entitlement is still the equivalent of 15 hours per week over 38 weeks per year, unless otherwise agreed. Where a child attends two providers, the Local Authority will fund each provider on a pro-rata basis only up to a maximum of 15. Where a child attends two providers, the individual providers should ensure they are aware of the entitlement hours being accessed by that child at another provider; this should help to avoid funding discrepancies regarding duplicate pupils. This may involve discussion with the providers involved where the pro-rata split is not clear from the census returns.
- Although a child can stretch their entitlement over more than 38 weeks, the Local Authority will fund providers on the basis that all children are taking their entitlement over 38 weeks. It is for the individual provider to then manage funding. To ensure providers are funded correctly, these children should still be recorded in the censuses as accessing 15 hours or 30 hours, where they access an annual total of 570 hours (equivalent to 15 hours x 38 weeks) or 1,140 hours (equivalent to 30 hours x 38 weeks).
- The ESYFF no longer applies a cap on the number of hours funded based on the published admission number of a maintained provider. However, schools and academies are expected to remain within their agreed Published Admission Number (PAN).
- More detailed guidance on the eligibility requirements for the extended 30 hours entitlement, the processes for determining this and how the Authority is required to verify eligibility, can be found on Bradford Schools Online [here](#).

e) The Confirmed Indicative Budget published in March 2019 for schools and classes only gives an estimate of funding. A pre-calculated Indicative Budget for PVI providers is replaced with a flexible Ready Reckoner

- A pre-calculated 1st draft Indicative Budget for 2019/20 will be published at the end of February 2019 only for maintained school and academy providers. This will show a provider's Base Rate and Deprivation and SEND Funding Rate, which are fixed for 2019/20. For the purposes of calculating these Indicative Budgets, simple estimates of the funded entitlement hours for the following year will be used. The pre-calculated Indicative Budget will be largely calculated on hours delivered by each school recorded in the previous year i.e. estimating that a school's numbers will be the same, adjusted for known changes, such as the full year delivery of the extended 30 hours entitlement.
- Maintained school providers and academies will have the opportunity to revise their estimates, should they wish, to incorporate their latest information on admissions for the coming financial year, including anticipated numbers of children taking up the extended 30 hours offer. A Confirmed Indicative Budget for 2019/20 will then be published in mid-March 2019. This budget will be used to begin payments to maintained schools and academies within the established whole-school

advances system. A ready reckoner for maintained and academy providers to use to estimate funding adjustments will be published, as now, alongside the Confirmed Indicative Budgets.

- Pre-calculated Indicative Budgets are no longer published for PVI providers. Instead, an electronic (Excel) Ready Reckoner will be published in February 2019, showing the per hour rates of funding for each provider and allowing providers to calculate their own indicative budgets based on their estimates of hours to be delivered across the next financial year. This change is in response to the requests from providers to simplify the information that is published. Please note that the publication of a ready reckoner for PVI providers is not new, but its publication has been brought forward from March to February.

f) A provider's actual funding will be adjusted to reflect differences between estimated and actual entitlement hours delivered during the financial year

- Adjustments to funding will be calculated following each of the termly censuses:
 - Please see the timetable for when adjustments will be published and actioned in 2019/20. These adjustments will alter the amounts of funding physically paid to providers.
 - The adjustments will reflect the differences between the estimated and actual funded hours delivered.
 - A ready reckoner is provided by the Local Authority, which providers can use to anticipate these funding adjustments and plan their provision and spending accordingly.
 - A statement of the value of adjustments will be published in advance of the adjustments being actioned. Please see the timetable.
- Additional notes on the calculation of funding adjustments:
 - The value of adjustments is influenced by the accuracy of the estimates of funded hours. Adjustment values are likely to be larger in providers that have more volatile numbers that change month on month. Providers should use the Ready Reckoner.
 - These adjustments can be both positive and negative.
 - All adjustments for the 2019/20 financial year will be actioned before 31 March 2020.
 - Funding adjustments will take account of any sustainability funding; the ready reckoner provided by the Local Authority incorporates this.
 - Because of the very tight timescale for processing the data after the January 2020 census, the adjustments for the spring term 2020 for PVI providers will be based on the summary information. Where amendments to funding are subsequently identified e.g. for duplicate children, following the processing of the more accurate individual child level census data, these amendments will be incorporated into the adjustments made for the funding for the summer term 2020. Where a provider does not pay back any money owed to the Local Authority at year end via cheque the value of funding owed will be taken from the provider's summer term payment,
 - Where closed or closing providers owe funding to the Local Authority that cannot be recovered through the adjustment of advances the provider will be asked to pay the funding back via cheque.
 - Other funds – Early Years Pupil Premium and Disability Access Fund especially – will be paid within the termly system.
- The first payment of the year, in April 2019, for schools and classes will be based on the Confirmed Indicative Budget. For PVI providers this will be based on spring term 2019 actual delivery information.

g) In 2019/20 EYSFF funding will continue to be paid monthly to all providers

- Maintained schools and academies have a well-established whole-school monthly advances payment system and EYSFF funding will be allocated using this. The adjustments to EYSFF funding will be incorporated into the September 2019, December 2019 and March 2020 advances adjustments. Please see the timetable.

- We moved to monthly payments for PVI providers at April 2016. 2019/20 arrangements are the same as in 2018/19 and are as follows:
 - Summer Term 2019:
 - Funding calculated on the latest spring term 2019 delivery information will be divided by 5 (no. of months in the term) for 5 equal payments to be made between April and July.
 - 2 payments will be made in April, firstly for April and then for May. Payments for the remaining 3 months of summer term will be paid in May, June and July respectively.
 - Any positive or negative adjustment following the re-calculation of funding using May Census actual numbers will be added to or deducted from the July advance.
 - Where the July advance is insufficient to recoup the full value of any negative adjustment, the August advance will also be reduced. Where a negative balance is still outstanding after this, a deduction will be made from September advance.
 - Autumn Term 2019:
 - Funding calculated on the latest delivery information will be divided by 4 (no. of months in the term) for 4 equal payments to be made each month between August and November.
 - The payment for September will be made in August, with payments for the remaining 3 months of the term made in September, October and November.
 - Any positive or negative adjustment following the re-calculation of funding using the October Census actual numbers will be added to or deducted from the November advance.
 - Where the November advance is insufficient to recoup the full value of any negative adjustment, the December advance will also be reduced. Where a negative balance is still outstanding after this, a deduction will be made from the January advance.
 - Spring Term 2020:
 - 80% of funding calculated on the latest delivery information will be divided by 3 (no. of months in the term) for 3 equal payments to be made each month between December and February.
 - The payment for January will be made in December, with payments for the remaining 2 months of the term made in January and February.
 - Any positive adjustment following the re-calculation of funding using the January Census actual numbers will be paid in a single additional payment at the end of March. This payment will include any funds owed from 20% of the termly amount being withheld from the initial advances calculation.
 - A provider that has still been overpaid, after the 20% that was withheld from the initial calculation has been taken into account, must repay the value of overpayment by cheque by 30 April 2020. Where a cheque is not received by 30 April 2020, the Local Authority will deduct the value of the outstanding overpayment from the next available monthly advance in the summer term. This is likely to be in May 2020.
- The Authority will continue to develop the Bradford Provider Gateway and will continue to talk to PVI providers about how information submitted through the Gateway can feed into the monthly payments system (so that initial payments at the start of each term are based on latest delivery information).
- Where a PVI provider experiences exceptional cash flow difficulties, they should contact the Local Authority to discuss the matter further. Contact details can be found in Section 3 of this document.
- Monthly payments will incorporate payments for 2 Year Olds, 3 & 4 Year Olds, Early Years Pupil Premium, DAF funding, and any other applicable funding due from Bradford Council to providers.
- Funding of Early Years Pupil Premium will be calculated on a retrospective basis and will be added to monthly advances as a lump sum in September, December and March.
- Providers will receive one single payment each month combining all the funding and grants applicable for that month. A breakdown of the values paid for each section of funding and/or grants

will be shown on the advances (payments) update schedules. This will be updated and published on Bradford Schools Online monthly. We strongly recommend providers download this schedule every month.

h) Approach to funding Sustainability Issues in 2019/20

- The EYSFF in 2019/20 continues to include a “sustainability” lump sum factor, which works on a sliding scale basis to allocate funding specifically to Maintained Nursery Schools in addition to the funding per children per hour. This factor ensures that funding allocations continue to reflect specific:
 - Site related costs: buildings and grounds maintenance costs, rates and insurance,
 - Fixed type costs incurred by maintained providers in leadership and management and administration and premises staffing.
- Both maintained / academy and PVI providers can access advice on sufficiency and sustainability provided by Bradford Council Early Years Services.
- The Schools Forum has established a process, which is currently used to consider the allocation of additional funding, on a one off basis, to Primary schools facing exceptional cost pressures during the financial year. Requests for funding, submitted by schools, are reviewed on an individual case basis against set criteria. The most common reason for requests is a significant increase in pupil numbers during the financial year, where the school has had to make additional provision, such as providing up a new class. This established process will be used in 2019/20 as the basis on which to consider the allocation of additional funding to any maintained / academy or PVI provider that may face exceptional cost pressures. A likely common reason for providers asking for exceptional funding will be where a provider has admitted a significant number of children after the census has been collected for that term. In such cases, exceptional circumstances will always be measured in terms of the level of additional cost pressure faced by the provider in admitting these children, rather than simply measured by the number of additional children not counted in the census.

i) The Early Years Pupil Premium (EYPP) in 2019/20

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

j) Disability Access Funding (DAF)

- The DAF is allocated for children age three and four year old who are:
 - accessing their entitlement hours at a provider in Bradford – they do not have to be accessing all their entitled hours
 - and receiving Disability Living Allowance (DLA)
- Please note that four year olds in a maintained, academy or free school reception class are not eligible.
- DAF funding is allocated to support providers towards making reasonable adjustments that will benefit the child and the setting as a whole. It cannot be used to pay for additional hours and services. Providers must discuss plans with the parent and how the funding will be used.
- It is a payment of £615 per year.
- Parents are required to make an online application; they can access this through Bradford Council's Families information Service website [Disability Access Fund Application](#). The application form requires basic details of the parent, the name of the chosen provider, and a copy of the child's Disability Living Allowance award letter.
- Support is available for parents who require help to make an application including face to face support if required. Providers should signpost parents to the website and/or provide them with the contact number 01274 431386.
- DAF funding cannot be split between providers, so if a child is splitting their entitlement hours with more than one provider, the parent will be required to nominate one provider.
- The DAF is for 1 calendar year; the funding period will be based on the award date, for example if a child was awarded the funding on the 30 October 2019 then they can reapply to be awarded again on the 30 October 2020.
- If a child leaves after the funding has been awarded, the provider will not be required to pay back any money even if the child leaves to go to another provider.
- The application will be processed by the Early Years Funding team; they will check the child is attending a provider in Bradford and that the child is in receipt of DLA. Parents will be informed of the outcome of the application; if successful they will be given an award date and the date they can reapply if their child is still accessing their early year's entitlement. The provider they have nominated will be informed and provided with details of the funding period.
- Providers will receive payment of the full amount of £615 through the existing early years funding payment process.

k) Early Years SEND Inclusion Fund

- Local authorities are required to have SEN Inclusion Funds for all 3 & 4 year olds with special educational needs (SEN) who are taking up the entitlements, regardless of the number of hours taken. These funds are intended to support local authorities to work with providers to address the needs of individual children with SEN. This fund will also support local authorities to undertake their responsibilities to strategically commission SEN services as required under the Children and Families Act 2014. Local authorities are expected to target SEN Inclusion Funds at children with lower level emerging SEND. All early years providers that are eligible to receive funding for the entitlements for three and four year olds are also eligible to receive support from the SEN inclusion fund.
- The Authority is seeking to implement a new holistic approach during 2019/20, subject to the outcomes of this consultation. **Our proposed holistic approach is set out in detail in Appendix 2 at the back of this document (still to be attached).** This approach represents a change from what PVI providers have previously accessed (known as 'EYIP' funds).

- The Authority aims to pilot the proposed new holistic model for schools and classes from the beginning of the spring 2019 term and, subject to the outcomes of this consultation, bring PVI providers, schools and classes together under the new model from either April 2019 or September 2019. We will continue to operate the existing 'EYIP' inclusion model for PVI providers until the new model is introduced. Any allocations that have been agreed under the current model that extend beyond the introduction of the new model would be funded until these expire.
- The final agreed inclusion funding process for 2019/20 will be confirmed, following consultation and pilot, in the updated Technical Statement that will be published in January 2019.

I) The Entitlement for Eligible 2 year olds

- Early education became a statutory entitlement for eligible 2 year olds from 1 September 2013. Eligible children are defined as children who are looked after and children who meet the Free School Meals eligibility criteria. The programme was extended from September 2014 to include around 40% of 2 year olds.
- In 2018/19 these places are funded on a flat rate of £5.20 per hour. Child numbers are counted and funded in the same way as for 3 / 4 year olds – based on participation recorded at individual providers in the termly censuses, but incorporating a second headcount each term. This second headcount identifies the most vulnerable children that don't arrive neatly at the start of term (especially the autumn term when the census is taken early in October). The second headcount supports meeting the key outcome, which is to secure sufficient places on a participation-led funding basis.
- This approach is continued in 2019/20 at a single flat rate per hour, £5.20 for all children. Please note that the national funding Regulations only permit a single flat rate to be used to allocate funding for the 2 year old offer.
- The second head count will be taken on the following dates:
 - Summer term: 13 June 2019
 - Autumn term: 31 October 2019
 - Spring Term: 20 February 2020
- The timetabling and counting arrangements for the funding of the 2 year old entitlement are otherwise the same as for the 3 and 4 year old entitlement. Providers will be funded for their delivery of the 2 year old entitlement within their single monthly payment from the Authority.

m) Who do I contact?

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

Maintained school and academy providers: Susan Krupinski, School Funding Team, City of Bradford Metropolitan District Council, 01274 434173, susan.krupinski@bradford.gov.uk

Private, Voluntary & Independent providers: Jaclyn McManus, Early Years Service, City of Bradford Metropolitan District Council, 01274 431965, EarlyEducationFund@bradford.gov.uk

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

Appendix 1: Bradford District Early Years Single Funding Formula 2019/20 Timetable

Please read this timetable alongside the separate 'Technical Statement', which explains how the Early Years Single Funding Formula (EYSFF) will be applied across the Bradford District for the 2019/20 financial year.

| Date | Key Activity |
|----------------------|--|
| January 2019 | <p>a) Department for Education (DfE) January Census 17 January</p> |
| February 2019 | <p>a) 1st draft of Indicative Budgets for 2019/20 published week commencing 18 February</p> <ul style="list-style-type: none"> • <u>Maintained / Academy providers</u> will be able to access on the Bradford Schools Online (BSO) website pre-calculated annual forecasted allocations for 2019/20 (on estimated funded hours based on the previous year's delivery and incorporating further estimates of full year delivery of the 30 hours extended entitlement) as part of their S251 Budget Statements. Providers will then have approximately 3 weeks to review the estimates of funded hours, with the opportunity to change these up or down, prior to the publication of Confirmed Indicative Budgets. • <u>PVI providers</u> will be able to access on the Bradford Schools Online (BSO) website an electronic (Excel) Ready Reckoner, showing rates of funding for 2019/20 and allowing providers to calculate forecasted annual allocations on their estimates of numbers for 2019/20. Pre-calculated annual forecasts will not be published. <p>b) Spring Term 2019 Adjustments Statement Published week commencing 25 February</p> <ul style="list-style-type: none"> • A reconciliation statement for all providers will be published, which will show the differences between estimated and actual spring term funded hours delivered and the value of adjustments due. • <u>Maintained / Academy providers</u> and <u>PVI providers</u> will be able to access this statement on the BSO website. |
| March 2019 | <p>a) Confirmed Indicative Budgets for 2019/20 published week commencing 11 March</p> <ul style="list-style-type: none"> • <u>Maintained / Academy Providers</u>: the Confirmed Indicative Budgets will establish the starting point for funding / payments for the 2019/20 financial year. These budgets will be different from the 1st draft where providers have asked for their estimates of funded numbers to be altered. Where a provider has not asked for their estimates to be altered their confirmed Indicative Budget will be the same as their 1st draft. • The Confirmed Indicative Budgets will be published with a warning that these budgets are subject to change, for differences between estimates of and actual funded hours delivered recorded in the termly censuses. • The Confirmed Indicative Budgets will be published in the same way as the 1st draft Indicative Budgets. • At the same time Confirmed Indicative Budgets are published, the Authority will |

| | |
|--------------------------------|--|
| | <p>provide a 'ready reckoner', which providers can use to anticipate likely adjustments to funding for actual funded hours delivered.</p> <p>b) Monthly Advances for <u>Maintained / Academy and PVI providers</u> amended to incorporate Spring Term 2019 adjustment</p> <ul style="list-style-type: none"> • For <u>Maintained / Academy providers</u>, the value of Local Authority I01 funding used to calculate the monthly advances will be amended in the final advances update in March 2019 to take account of the adjustment due from the January census. This adjustment will impact on each school's March 2019 carry forward balances position. Schools should use the ready reckoner provided by the Authority to ensure that this adjustment is incorporated by schools in their forecast of their year end balances position. • For <u>PVI providers</u>, any positive adjustment following the re-calculation of funding using the January Census actual numbers will be paid in a single additional payment. A provider that has been overpaid must repay the value of overpayment by cheque by 30 April 2019. Where a cheque is not received by 30 April 2019, the Local Authority will deduct the value of the outstanding overpayment from the next available monthly advance in the summer term. This is likely to be in May 2019. |
| <p>April 2019</p> | <p>a) For <u>Maintained / Academy and PVI providers</u>, initial payments for 2019/20 will begin</p> <ul style="list-style-type: none"> • For <u>Maintained / Academy providers</u>, monthly advances for 2019/20 will be calculated from the Section 251 Budget Statements and a schedule & breakdown of payments will be published at the beginning of April. • For <u>PVI Providers</u>, monthly payments for 2019/20 will begin. These will be based on the latest delivery information. Providers should consult the advances statement published on Bradford Schools Online at the beginning of April. |
| <p>May 2019</p> | <p>a) May (Summer Term) Census 16 May 2019</p> <ul style="list-style-type: none"> • <u>Maintained / Academy providers</u> will submit their termly census to the DfE via COLLECT. This Census is not used for EYSFF funding purposes. • <u>PVI providers</u> will submit their delivery information to Bradford Council EYS via the Bradford Provider Gateway on Bradford Schools Online. The Gateway will be open to do this from the beginning of term. |
| <p>June / July 2019</p> | <p>a) Summer Term Adjustments Statement Published week commencing 24 June and payment adjustments PVI providers</p> <ul style="list-style-type: none"> • A second head count for 2 year olds will be taken on Thursday 13 June 2019. • A reconciliation statement for all providers will be published, which will show the differences between estimated and actual summer term funded hours delivered and the value of adjustments due. The adjustment will be a positive value (meaning that the Local Authority owes the provider more funding), where the number of hours delivered actually recorded in the May census is greater than the delivery information used to make initial payments. The adjustment will be a negative value (meaning the provider must repay funding back to the Local |

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| | <p>Authority) where the number of hours delivered recorded in the May census is lower than the delivery information used to make initial payments.</p> <ul style="list-style-type: none"> • <u>Maintained / Academy and PVI providers</u> will be able to access this adjustments statement on the BSO website. • Adjustments will be made to the July 2019 payment for <u>PVI providers</u> (both positive and negative) for the re-calculation of summer term funding from the May Census. The August payment may also be adjusted, where the value of the July advance is not sufficient to enable full recovery of a negative adjustment. |
| August 2019 | a) Deadline for <u>PVI providers</u> to notify the Local Authority, through the Gateway, of estimated delivery in the autumn term Monday 5 August |
| September 2019 | <p>a) Monthly Advances for <u>Maintained / Academy providers</u> amended to incorporate Summer Term adjustments</p> <ul style="list-style-type: none"> • For Maintained / Academy providers, the value of LA I01 funding used to calculate the monthly advances will be amended in September to take account of the adjustment due from the summer term actual delivery data. |
| October 2019 | <p>a) October (Autumn Term) Census 3 October 2019</p> <ul style="list-style-type: none"> • <u>Maintained / Academy providers</u> will submit their termly census to the DfE via COLLECT. This Census is not used for EYSFF funding purposes. • <u>PVI providers</u> will submit their delivery information to Bradford Council EYS via the Bradford Provider Gateway on Bradford Schools Online. The Gateway will be open to do this from the beginning of term. |
| November 2019 | <p>a) Autumn Term Adjustments Statement Published week commencing 11 November and payment adjustments PVI providers</p> <ul style="list-style-type: none"> • A second headcount of 2 year olds will be taken on 31 October 2019. • A reconciliation statement for all providers will be published, which will show the differences between estimated and actual autumn term funded hours delivered and the value of adjustments due. • <u>Maintained / Academy providers</u> and <u>PVI providers</u> will be able to access this statement on the BSO website. • Adjustments will be made to the November 2019 payment for <u>PVI providers</u> (both positive and negative) for the re-calculation of autumn term funding from the October Census. The December payment may also be adjusted, where the value of the November advance is not sufficient to enable full recovery of a negative adjustment. <p>b) Deadline for <u>PVI providers</u> to notify the Local Authority, through the Gateway, of estimated delivery in the spring term Friday 29 November</p> |
| December 2019 | a) Monthly Advances for <u>Maintained / Academy providers</u> amended to incorporate Autumn Term adjustments |

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| | <ul style="list-style-type: none"> • For Maintained / Academy providers, the value of LA I01 funding used to calculate the monthly advances will be amended in December to take account of the adjustment due for the autumn term. |
| January 2020 | <p>a) DfE January (annual) Census 16 January 2020</p> <ul style="list-style-type: none"> • <u>Maintained / Academy providers</u> will submit their termly census to the DfE via COLLECT. This Census is not used for EYSFF funding purposes. • <u>PVI providers</u> will submit their delivery information to Bradford Council EYS via the Bradford Provider Gateway on Bradford Schools Online. The Gateway will be open to do this from the beginning of term. |
| February 2020 | <p>a) 1st Draft of Indicative Budgets / Ready Reckoners for 2020/21 Published (see notes for February 2019)</p> <p>b) A second head count of 2 year olds will be taken on Thursday 27 February 2020.</p> |
| March 2020 | <p>a) Spring Term 2020 Adjustments Statement Published week commencing 24 February</p> <ul style="list-style-type: none"> • A reconciliation statement for all providers will be published, which will show the differences between estimated and actual spring term funded hours delivered and the value of adjustments due. • <u>Maintained / Academy providers</u> and <u>PVI providers</u> will be able to access this statement on the BSO website. <p>b) Monthly Advances for <u>Maintained / Academy and PVI providers</u> amended to incorporate Spring Term 2020 adjustment</p> <ul style="list-style-type: none"> • For <u>Maintained / Academy providers</u>, the value of LA I01 funding used to calculate the monthly advances will be amended in the final advances update in March 2020 to take account of the adjustment due from the January census. This adjustment will impact on each school's March 2020 carry forward balances position. Schools should use the ready reckoner provided by the LA to ensure that this adjustment is incorporated by schools in their forecast of their year end balances position. • For <u>PVI providers</u>, any positive adjustment following the re-calculation of funding using the January Census actual numbers will be paid in a single additional payment. A setting that has been overpaid, must repay the value of overpayment by cheque by 30 April 2020. Where a cheque is not received by 30 April 2020, the Local Authority will deduct the value of the outstanding overpayment from the next available monthly advance in the summer term. This is likely to be in May 2020. <p>c) Confirmed Indicative Budgets / Ready Reckoners for 2020/21 Published (see notes for March 2018)</p> |

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

Appendix 2 – Early Years SEND Inclusion Fund Proposal for Consultation

TO BE ADDED

RESPONSES FORM

Consultation on the Early Years Single Funding Formula 2019/20

Name _____ Setting Name _____

THE DEADLINE FOR RESPONSES TO THIS CONSULTATION IS FRIDAY 30 NOVEMBER 2018

Please send completed questionnaire responses to:

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

Tel: 01274 432678

Fax: 01274 435054

Email: andrew.redding@bradford.gov.uk

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

Question 1 – Do you agree with the proposal to retain the existing framework, timetabling and counting arrangements for the operation of the EYSFF in 2019/20? If not, please can you explain why not.

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

If not, please provide further explanation here:

Question 2 – Do you have any comments on how we could improve our proposed arrangements, including where our guidance could be clearer?

Please comment here:

Question 3 – 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 2018/19 was £5.20 per hour)? If not, please can you explain why not.

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

If not, please provide further explanation here:

Question 4 – Do you agree with the proposal to set the value of the 3&4 year old universal base rate in 2019/20 at £4.11 i.e. at the value that was published in the Authority’s consultation in autumn 2016? If not, please can you explain why not.

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

If not, please provide further explanation here:

Question 5 – Do you have any comments on this estimated universal base rate?

Please comment here:

Question 6 – Do you agree with the proposal to continue our current Deprivation & SEND supplement factor in 2019/20 set to allocate 9.5% of the EYSFF? If not, please can you explain why not.

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

If not, please provide further explanation here:

Question 7 – Do you agree with the proposal not to add any further supplements into the Early Years Single Funding Formula in 2019/20? If not, please can you explain why not.

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

If not, please provide further explanation here:

Question 8 – Do you agree with the Authority’s proposals for a holistic early years SEND inclusion fund (set out in Appendix 2)? If not, please can you explain why not.

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

If not, please provide further explanation here:

Question 9 – Are there any changes that you would like to see made to the Early Years Single Funding Formula in 2019/20 that have not been proposed?

Please comment here:

Question 10 – Do you have any other comments that you have not made elsewhere in your response, including matters that you would wish to be included in the Authority’s review of the EYSFF for 2020/21?

Please comment here:

2019/20 Indicative Variances Analysis - Maintained Nursery Schools - EYSFF 3 /4 Year Old Free Entitlement Funding Indicative Rates

| Type | DfE | Setting | Total EYSFF Confirmed Indicative Budgets 2018/19 | 2018/19 Total Funding Rate | 2019/20 Indicative Universal Setting Base Rate | 2019/20 Indicative Setting Base Rate Protection (MNS Supplement) | 2019/20 Indicative Deprivation Rate | 2019/20 Indicative Total Rate | Variance in Funding Rate 19/20 vs. 18/19 |
|---------------|------|------------------------------|---|-------------------------------|--|--|--|-------------------------------------|---|
| NURSERY | 1008 | Abbey Green Nursery | 284,739 | £6.99 | £3.97 | £1.73 | £1.29 | £6.99 | £0.00 |
| NURSERY | 1012 | Canterbury Children's Centre | 512,273 | £7.13 | £3.97 | £1.73 | £1.43 | £7.13 | £0.00 |
| NURSERY | 1001 | Hirst Wood Nursery | 459,272 | £6.15 | £3.97 | £1.73 | £0.45 | £6.15 | £0.00 |
| NURSERY | 1002 | Lilycroft Nursery | 470,162 | £6.65 | £3.97 | £1.73 | £0.95 | £6.65 | £0.00 |
| NURSERY | 1009 | Midland Road Nursery | 509,696 | £6.81 | £3.97 | £1.73 | £1.11 | £6.81 | £0.00 |
| NURSERY | 1010 | St Edmund's Nursery | 732,819 | £6.56 | £3.97 | £1.73 | £0.86 | £6.56 | £0.00 |
| NURSERY | 1000 | Strong Close Nursery | 444,425 | £6.30 | £3.97 | £1.73 | £0.60 | £6.30 | £0.00 |
| Totals | | | 3,413,386 | | | | | | |

Notes

EYSFF allocations shown exclude high needs funding for children centre plus provision

These also exclude any funding associated with the delivery of the 2 year old offer

2018/19 allocations shown are taken from the Confirmed Indicative Budgets for nursery schools published in March 2018

2019/20 allocations are based on the proposal to continue to retain the 2016/17 funding rates for individual schools

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2019/20 Early Years Single Funding Formula - Nursery Classes INDICATIVE 3&4 Year Old Funding Rates

| Type | Setting | 2019/20 INDICATIVE Funding Rate | 2018/19 Total Funding Rate | Diff in Rate v. 2018/19 | Cash Difference based on 18/19 Hours | % Rates Diff |
|--------------------|--|--|-------------------------------------|----------------------------|---|--------------|
| PRIMARY | All Saints' CE Primary School (Bradford) | £4.73 | £4.75 | -£0.03 | -£972 | -0.5% |
| RECOUPMENT ACADEMY | Beckfoot Allerton Primary Academy | £4.55 | £4.56 | -£0.01 | -£396 | -0.3% |
| RECOUPMENT ACADEMY | Appleton Academy | £4.51 | £4.51 | £0.00 | -£65 | -0.1% |
| PRIMARY | Ashlands Primary School | £4.18 | £4.20 | -£0.01 | -£313 | -0.3% |
| RECOUPMENT ACADEMY | Atlas School | £4.77 | £4.81 | -£0.03 | -£439 | -0.7% |
| PRIMARY | Baildon CE Primary School | £4.20 | £4.23 | -£0.03 | -£584 | -0.6% |
| PRIMARY | Bankfoot Primary School | £4.60 | £4.62 | -£0.02 | -£564 | -0.3% |
| RECOUPMENT ACADEMY | Barkerend Primary Leadership Academy | £4.73 | £4.77 | -£0.04 | -£1,286 | -0.9% |
| PRIMARY | Bowling Park Primary School | £4.69 | £4.73 | -£0.04 | -£1,573 | -0.9% |
| PRIMARY | Brackenhill Primary School | £4.55 | £4.57 | -£0.02 | -£541 | -0.5% |
| RECOUPMENT ACADEMY | Bradford Academy | £4.61 | £4.64 | -£0.03 | -£940 | -0.7% |
| RECOUPMENT ACADEMY | Byron Primary Academy | £4.66 | £4.69 | -£0.03 | -£1,139 | -0.6% |
| PRIMARY | Carrwood Primary School | £4.94 | £4.98 | -£0.04 | -£1,080 | -0.8% |
| PRIMARY | Cavendish Primary School | £4.60 | £4.63 | -£0.03 | -£747 | -0.6% |
| RECOUPMENT ACADEMY | Christ Church Primary Academy | £4.50 | £4.52 | -£0.02 | -£351 | -0.5% |
| RECOUPMENT ACADEMY | Clayton St John's CE Primary Academy | £4.41 | £4.43 | -£0.02 | -£558 | -0.5% |
| RECOUPMENT ACADEMY | Copthorne Primary | £4.53 | £4.55 | -£0.02 | -£947 | -0.5% |
| PRIMARY | Cottingley Village Primary School | £4.29 | £4.30 | -£0.01 | -£206 | -0.3% |
| PRIMARY | Crossflatts Primary School | £4.25 | £4.25 | -£0.01 | -£240 | -0.2% |
| PRIMARY | Crossley Hall Primary School | £4.52 | £4.55 | -£0.03 | -£1,319 | -0.6% |
| RECOUPMENT ACADEMY | Denholme Primary | £4.30 | £4.31 | -£0.01 | -£286 | -0.3% |
| RECOUPMENT ACADEMY | Dixons Allerton Academy | £4.53 | £4.54 | -£0.01 | -£252 | -0.2% |
| RECOUPMENT ACADEMY | Dixons Marchbank Academy | £4.66 | £4.68 | -£0.03 | -£1,095 | -0.6% |
| RECOUPMENT ACADEMY | Eastwood Primary Academy | £4.70 | £4.73 | -£0.03 | -£1,106 | -0.6% |
| PRIMARY | Eldwick Primary School | £4.17 | £4.18 | -£0.01 | -£332 | -0.3% |
| PRIMARY | Fagley Primary School | £4.68 | £4.71 | -£0.03 | -£953 | -0.6% |
| PRIMARY | Farfield Primary | £4.64 | £4.65 | -£0.01 | -£281 | -0.3% |
| RECOUPMENT ACADEMY | Farnham Primary Academy | £4.60 | £4.62 | -£0.02 | -£1,023 | -0.4% |
| PRIMARY | Fearnville Primary School | £4.75 | £4.76 | -£0.01 | -£290 | -0.2% |
| RECOUPMENT ACADEMY | Feversham Primary Academy | £4.70 | £4.73 | -£0.03 | -£985 | -0.7% |
| PRIMARY | Foxhill Primary School | £4.28 | £4.30 | -£0.02 | -£419 | -0.5% |
| PRIMARY | Frizinghall Primary School | £4.44 | £4.46 | -£0.01 | -£295 | -0.3% |
| PRIMARY | Girlington Primary School | £4.67 | £4.69 | -£0.02 | -£711 | -0.4% |
| PRIMARY | Glenaire Primary School | £4.45 | £4.47 | -£0.02 | -£357 | -0.4% |
| RECOUPMENT ACADEMY | Green Lane Primary | £4.79 | £4.83 | -£0.03 | -£1,325 | -0.7% |
| PRIMARY | Greengates Primary School | £4.48 | £4.52 | -£0.04 | -£605 | -0.9% |
| PRIMARY | Grove House Primary School | £4.39 | £4.40 | -£0.01 | -£281 | -0.2% |
| RECOUPMENT ACADEMY | Haworth Primary Academy | £4.30 | £4.31 | -£0.01 | -£169 | -0.2% |
| RECOUPMENT ACADEMY | Beckfoot Heaton Primary Academy | £4.52 | £4.55 | -£0.02 | -£1,274 | -0.5% |
| RECOUPMENT ACADEMY | High Crags Primary Leadership Academy | £4.64 | £4.66 | -£0.02 | -£372 | -0.4% |
| PRIMARY | Hill Top CE Primary School | £4.37 | £4.39 | -£0.02 | -£502 | -0.4% |
| RECOUPMENT ACADEMY | Hollingwood Primary Academy | £4.41 | £4.43 | -£0.01 | -£378 | -0.3% |
| RECOUPMENT ACADEMY | Holybrook Primary Academy | £4.77 | £4.80 | -£0.04 | -£481 | -0.8% |
| RECOUPMENT ACADEMY | Holycroft Primary Academy | £4.61 | £4.66 | -£0.05 | -£1,277 | -1.1% |
| PRIMARY | Home Farm Primary School | £4.53 | £4.56 | -£0.03 | -£849 | -0.6% |
| RECOUPMENT ACADEMY | Horton Grange Primary | £4.56 | £4.58 | -£0.02 | -£1,005 | -0.5% |
| PRIMARY | Ingrow Primary School | £4.53 | £4.55 | -£0.02 | -£455 | -0.5% |
| RECOUPMENT ACADEMY | Iqra Primary Academy | £4.77 | £4.80 | -£0.04 | -£1,110 | -0.8% |
| PRIMARY | Keelham Primary School | £4.29 | £4.31 | -£0.02 | -£207 | -0.4% |
| PRIMARY | Keighley St Andrew's CE Primary School | £4.73 | £4.77 | -£0.05 | -£1,249 | -1.0% |
| PRIMARY | Killinghall Primary School | £4.66 | £4.69 | -£0.03 | -£1,238 | -0.6% |
| PRIMARY | Knowleswood Primary School | £4.88 | £4.93 | -£0.04 | -£940 | -0.9% |
| RECOUPMENT ACADEMY | Lapage Primary School and Nursery | £4.68 | £4.70 | -£0.02 | -£1,025 | -0.5% |
| PRIMARY | Ley Top Primary School | £4.66 | £4.67 | -£0.01 | -£124 | -0.2% |
| PRIMARY | Lidget Green Primary School | £4.61 | £4.62 | -£0.01 | -£426 | -0.2% |
| PRIMARY | Lister Primary School | £4.57 | £4.59 | -£0.02 | -£492 | -0.5% |
| PRIMARY | Long Lee Primary School | £4.39 | £4.39 | -£0.01 | -£153 | -0.1% |
| PRIMARY | Low Ash Primary School | £4.37 | £4.40 | -£0.03 | -£899 | -0.6% |
| PRIMARY | Lower Fields Primary School | £4.66 | £4.71 | -£0.05 | -£1,292 | -1.1% |
| RECOUPMENT ACADEMY | Margaret McMillan Primary School | £4.54 | £4.56 | -£0.02 | -£581 | -0.4% |
| PRIMARY | Marshfield Primary School | £4.56 | £4.59 | -£0.03 | -£690 | -0.6% |
| RECOUPMENT ACADEMY | Merlin Top Primary Academy | £4.65 | £4.69 | -£0.04 | -£1,085 | -0.8% |

| Type | Setting | 2019/20 Total INDICATIVE Funding Rate | 2018/19 Total Funding Rate | Diff in Rate v. 2018/19 | Cash Difference based on 18/19 Hours | % Rates Diff |
|--------------------|---|---|-------------------------------------|----------------------------|---|--------------|
| PRIMARY | Miriam Lord Community Primary School | £4.76 | £4.80 | -£0.05 | -£1,034 | -1.0% |
| PRIMARY | Myrtle Park Primary School | £4.28 | £4.30 | -£0.02 | -£153 | -0.4% |
| RECOUPMENT ACADEMY | Beckfoot Nessfield Primary Academy | £4.40 | £4.40 | -£0.01 | -£93 | -0.1% |
| PRIMARY | Newby Primary School | £4.66 | £4.71 | -£0.06 | -£2,116 | -1.2% |
| PRIMARY | Newhall Park Primary School | £4.50 | £4.52 | -£0.03 | -£990 | -0.6% |
| RECOUPMENT ACADEMY | Oakworth Primary Academy | £4.24 | £4.25 | -£0.01 | -£457 | -0.3% |
| RECOUPMENT ACADEMY | Our Lady of Victories Catholic Primary Academy | £4.61 | £4.63 | -£0.02 | -£543 | -0.4% |
| PRIMARY | Parkland Primary School | £4.57 | £4.58 | -£0.02 | -£303 | -0.4% |
| RECOUPMENT ACADEMY | Parkwood Primary School | £4.60 | £4.60 | £0.00 | £18 | 0.0% |
| PRIMARY | Peel Park Primary School | £4.64 | £4.66 | -£0.02 | -£522 | -0.4% |
| PRIMARY | Poplars Farm Primary School | £4.43 | £4.46 | -£0.03 | -£598 | -0.7% |
| RECOUPMENT ACADEMY | Beckfoot Priestthorpe Primary School | £4.29 | £4.29 | £0.00 | -£43 | -0.1% |
| PRIMARY | Princeville Primary School and Children's Centre | £4.59 | £4.62 | -£0.03 | -£1,106 | -0.6% |
| RECOUPMENT ACADEMY | Reevy Hill Primary School | £4.68 | £4.69 | -£0.01 | -£155 | -0.2% |
| PRIMARY | Riddlesden St Mary's CE Primary | £4.40 | £4.45 | -£0.05 | -£1,014 | -1.1% |
| PRIMARY | Russell Hall Primary School | £4.30 | £4.32 | -£0.02 | -£445 | -0.4% |
| RECOUPMENT ACADEMY | Ryecroft Primary Academy | £4.84 | £4.88 | -£0.04 | -£782 | -0.8% |
| PRIMARY | Sandal Primary School and Nursery | £4.24 | £4.25 | -£0.01 | -£137 | -0.2% |
| PRIMARY | Shipleigh CE Primary School | £4.42 | £4.42 | £0.00 | £17 | 0.0% |
| RECOUPMENT ACADEMY | Shirley Manor Primary Academy | £4.54 | £4.56 | -£0.02 | -£215 | -0.4% |
| PRIMARY | Silsden Primary School | £4.24 | £4.25 | -£0.01 | -£511 | -0.4% |
| RECOUPMENT ACADEMY | Southmere Primary Academy | £4.67 | £4.69 | -£0.03 | -£352 | -0.6% |
| RECOUPMENT ACADEMY | Dixons Manningham Primary Academy | £4.83 | £4.87 | -£0.03 | -£420 | -0.7% |
| RECOUPMENT ACADEMY | St Anne's Catholic Primary Academy | £4.62 | £4.62 | £0.00 | -£55 | -0.1% |
| PRIMARY | St Anthony's Catholic Primary School (Clayton) | £4.48 | £4.51 | -£0.03 | -£721 | -0.6% |
| PRIMARY | St Columba's Catholic Primary School | £4.71 | £4.74 | -£0.04 | -£763 | -0.8% |
| PRIMARY | St Cuthbert & the First Martyrs' Catholic Primary | £4.51 | £4.54 | -£0.03 | -£260 | -0.6% |
| PRIMARY | St Francis' Catholic Primary School | £4.41 | £4.42 | -£0.01 | -£210 | -0.3% |
| RECOUPMENT ACADEMY | St James' Church Primary School | £4.59 | £4.62 | -£0.04 | -£886 | -0.8% |
| RECOUPMENT ACADEMY | St John's CE Primary School | £4.56 | £4.60 | -£0.04 | -£1,498 | -0.9% |
| PRIMARY | St Joseph's Catholic Primary School (Bradford) | £4.75 | £4.79 | -£0.04 | -£785 | -0.8% |
| RECOUPMENT ACADEMY | St Joseph's Catholic Primary, Keighley | £4.47 | £4.50 | -£0.03 | -£768 | -0.7% |
| PRIMARY | St Mary's and St Peter's Catholic | £4.67 | £4.71 | -£0.04 | -£789 | -0.9% |
| PRIMARY | St Matthew's Catholic Primary School | £4.61 | £4.64 | -£0.03 | -£629 | -0.8% |
| PRIMARY | St Matthew's CE Primary School | £4.56 | £4.60 | -£0.05 | -£1,132 | -1.0% |
| RECOUPMENT ACADEMY | St Oswald's CE Primary Academy | £4.78 | £4.82 | -£0.04 | -£830 | -0.8% |
| RECOUPMENT ACADEMY | St Philip's CE Primary Academy | £4.65 | £4.69 | -£0.04 | -£496 | -0.8% |
| PRIMARY | St Stephen's CE Primary School | £4.71 | £4.73 | -£0.02 | -£725 | -0.5% |
| RECOUPMENT ACADEMY | St Walburga's Catholic Primary School | £4.38 | £4.37 | £0.00 | £82 | 0.1% |
| RECOUPMENT ACADEMY | St Winefride's Catholic Primary | £4.43 | £4.44 | -£0.01 | -£400 | -0.3% |
| PRIMARY | Stanbury Village School | £4.29 | £4.30 | -£0.01 | -£94 | -0.2% |
| PRIMARY | Swain House Primary School | £4.47 | £4.48 | £0.00 | -£186 | -0.1% |
| PRIMARY | Thackley Primary School | £4.33 | £4.34 | £0.00 | -£152 | -0.1% |
| RECOUPMENT ACADEMY | Thornbury Primary Leadership Academy | £4.72 | £4.75 | -£0.03 | -£1,042 | -0.6% |
| RECOUPMENT ACADEMY | Thornton Primary School | £4.39 | £4.41 | -£0.02 | -£579 | -0.5% |
| PRIMARY | Trinity All Saints CE Primary School | £4.32 | £4.32 | £0.00 | -£1 | 0.0% |
| RECOUPMENT ACADEMY | Victoria Primary School | £4.57 | £4.61 | -£0.03 | -£735 | -0.7% |
| PRIMARY | Wellington Primary School | £4.44 | £4.46 | -£0.02 | -£871 | -0.5% |
| RECOUPMENT ACADEMY | Westbourne Primary School | £4.75 | £4.78 | -£0.03 | -£555 | -0.6% |
| RECOUPMENT ACADEMY | Westminster CE Primary Academy | £4.68 | £4.70 | -£0.03 | -£771 | -0.5% |
| RECOUPMENT ACADEMY | Whetley Primary Academy | £4.72 | £4.75 | -£0.03 | -£752 | -0.6% |
| PRIMARY | Wibsey Primary School | £4.46 | £4.46 | -£0.01 | -£318 | -0.2% |
| RECOUPMENT ACADEMY | Woodside Academy | £4.50 | £4.53 | -£0.03 | -£940 | -0.6% |
| RECOUPMENT ACADEMY | Worth Valley Primary | £4.52 | £4.54 | -£0.02 | -£535 | -0.5% |
| | | | Min | £0.00 | £82 | 0.1% |
| | | | Max | -£0.06 | -£2,116 | -1.2% |
| | | | Median | | | -0.5% |

Please note that deprivation rates for individual settings will be re-calculated for 2019/20 using January 2019 census data, when this is available

2019/20 Indicative Rates of Funding for Private, Voluntary and Independent Providers - EYSFF 3/ 4 Year Old Offer

| Provider Ref | 2018/19 | | | 2019/20 | | | Total Funding Rate Difference v. 2018 | % Diff in Funding Rate |
|--------------|-------------------|--------------------------|------------|--------------------------------------|------------------------------------|-----------------------|---------------------------------------|------------------------|
| | Setting Base Rate | Setting Deprivation Rate | Total Rate | Universal Base Rate + UBR Protection | Setting Deprivation Rate ESTIMATED | Total Indicative Rate | | |
| 1 | £4.12 | £0.06 | £4.18 | £4.11 | £0.06 | £4.17 | £-0.01 | -0.2% |
| 3 | £4.12 | £0.32 | £4.44 | £4.11 | £0.33 | £4.44 | £0.00 | 0.0% |
| 6 | £4.12 | £0.43 | £4.55 | £4.11 | £0.45 | £4.56 | £0.01 | 0.1% |
| 10 | £4.12 | £0.19 | £4.31 | £4.11 | £0.21 | £4.32 | £0.01 | 0.2% |
| 12 | £4.12 | £0.05 | £4.17 | £4.11 | £0.05 | £4.16 | £-0.01 | -0.3% |
| 14 | £4.12 | £0.51 | £4.63 | £4.11 | £0.46 | £4.57 | £-0.07 | -1.4% |
| 15 | £4.12 | £0.56 | £4.68 | £4.11 | £0.54 | £4.65 | £-0.02 | -0.5% |
| 16 | £4.12 | £0.52 | £4.64 | £4.11 | £0.48 | £4.59 | £-0.05 | -1.1% |
| 17 | £4.12 | £0.31 | £4.43 | £4.11 | £0.29 | £4.40 | £-0.02 | -0.6% |
| 18 | £4.12 | £0.48 | £4.60 | £4.11 | £0.49 | £4.60 | £0.00 | -0.1% |
| 19 | £4.12 | £0.07 | £4.19 | £4.11 | £0.07 | £4.18 | £-0.01 | -0.2% |
| 20 | £4.12 | £0.60 | £4.72 | £4.11 | £0.58 | £4.69 | £-0.02 | -0.5% |
| 22 | £4.12 | £0.24 | £4.36 | £4.11 | £0.23 | £4.34 | £-0.02 | -0.5% |
| 23 | £4.12 | £0.35 | £4.47 | £4.11 | £0.35 | £4.46 | £0.00 | -0.1% |
| 25 | £4.12 | £0.42 | £4.54 | £4.11 | £0.39 | £4.50 | £-0.04 | -0.9% |
| 26 | £4.12 | £0.15 | £4.27 | £4.11 | £0.14 | £4.25 | £-0.02 | -0.5% |
| 29 | £4.12 | £0.06 | £4.18 | £4.11 | £0.05 | £4.16 | £-0.02 | -0.5% |
| 31 | £4.12 | £0.21 | £4.33 | £4.11 | £0.21 | £4.32 | £-0.01 | -0.1% |
| 32 | £4.12 | £0.26 | £4.38 | £4.11 | £0.28 | £4.39 | £0.01 | 0.2% |
| 34 | £4.12 | £0.27 | £4.39 | £4.11 | £0.30 | £4.41 | £0.02 | 0.4% |
| 35 | £4.12 | £0.45 | £4.57 | £4.11 | £0.47 | £4.58 | £0.01 | 0.3% |
| 38 | £4.12 | £0.55 | £4.67 | £4.11 | £0.54 | £4.65 | £-0.01 | -0.3% |
| 41 | £4.12 | £0.05 | £4.17 | £4.11 | £0.05 | £4.16 | £-0.01 | -0.3% |
| 42 | £4.12 | £0.12 | £4.24 | £4.11 | £0.12 | £4.23 | £-0.01 | -0.2% |
| 43 | £4.12 | £0.19 | £4.31 | £4.11 | £0.18 | £4.29 | £-0.02 | -0.5% |
| 44 | £4.12 | £0.16 | £4.28 | £4.11 | £0.17 | £4.28 | £0.00 | 0.1% |
| 45 | £4.12 | £0.38 | £4.50 | £4.11 | £0.41 | £4.52 | £0.02 | 0.3% |
| 46 | £4.12 | £0.48 | £4.60 | £4.11 | £0.49 | £4.60 | £-0.01 | -0.1% |
| 47 | £4.12 | £0.58 | £4.70 | £4.11 | £0.58 | £4.69 | £-0.01 | -0.1% |
| 49 | £4.12 | £0.36 | £4.48 | £4.11 | £0.39 | £4.50 | £0.02 | 0.5% |
| 50 | £4.12 | £0.43 | £4.55 | £4.11 | £0.37 | £4.48 | £-0.07 | -1.5% |
| 51 | £4.12 | £0.06 | £4.18 | £4.11 | £0.05 | £4.16 | £-0.02 | -0.6% |
| 52 | £4.12 | £0.67 | £4.79 | £4.11 | £0.65 | £4.76 | £-0.03 | -0.6% |
| 55 | £4.12 | £0.14 | £4.26 | £4.11 | £0.14 | £4.25 | £-0.01 | -0.2% |
| 56 | £4.12 | £0.06 | £4.18 | £4.11 | £0.06 | £4.17 | £-0.01 | -0.3% |
| 63 | £4.12 | £0.29 | £4.41 | £4.11 | £0.30 | £4.41 | £0.00 | 0.0% |
| 64 | £4.12 | £0.32 | £4.44 | £4.11 | £0.32 | £4.43 | £-0.02 | -0.4% |
| 69 | £4.12 | £0.21 | £4.33 | £4.11 | £0.20 | £4.31 | £-0.01 | -0.3% |
| 70 | £4.12 | £0.35 | £4.47 | £4.11 | £0.33 | £4.44 | £-0.02 | -0.5% |
| 71 | £4.12 | £0.17 | £4.29 | £4.11 | £0.17 | £4.28 | £-0.01 | -0.2% |
| 72 | £4.12 | £0.54 | £4.66 | £4.11 | £0.54 | £4.65 | £0.00 | -0.1% |
| 73 | £4.12 | £0.35 | £4.47 | £4.11 | £0.33 | £4.44 | £-0.03 | -0.7% |
| 76 | £4.12 | £0.44 | £4.56 | £4.11 | £0.44 | £4.55 | £0.00 | -0.1% |
| 80 | £4.12 | £0.40 | £4.52 | £4.11 | £0.40 | £4.51 | £0.00 | -0.1% |
| 81 | £4.12 | £0.28 | £4.40 | £4.11 | £0.30 | £4.41 | £0.01 | 0.3% |
| 82 | £4.12 | £0.19 | £4.31 | £4.11 | £0.19 | £4.30 | £-0.02 | -0.4% |
| 83 | £4.12 | £0.29 | £4.41 | £4.11 | £0.25 | £4.36 | £-0.05 | -1.2% |
| 84 | £4.12 | £0.14 | £4.26 | £4.11 | £0.15 | £4.26 | £-0.01 | -0.1% |
| 85 | £4.12 | £0.56 | £4.68 | £4.11 | £0.56 | £4.67 | £-0.01 | -0.2% |
| 86 | £4.12 | £0.50 | £4.62 | £4.11 | £0.51 | £4.62 | £0.00 | 0.0% |
| 87 | £4.12 | £0.37 | £4.49 | £4.11 | £0.36 | £4.47 | £-0.02 | -0.4% |
| 89 | £4.12 | £0.05 | £4.17 | £4.11 | £0.05 | £4.16 | £-0.01 | -0.1% |
| 90 | £4.12 | £0.14 | £4.26 | £4.11 | £0.13 | £4.24 | £-0.02 | -0.4% |
| 91 | £4.12 | £0.08 | £4.20 | £4.11 | £0.09 | £4.20 | £0.00 | 0.1% |
| 92 | £4.12 | £0.32 | £4.44 | £4.11 | £0.30 | £4.41 | £-0.03 | -0.7% |
| 93 | £4.12 | £0.32 | £4.44 | £4.11 | £0.31 | £4.42 | £-0.02 | -0.5% |
| 95 | £4.12 | £0.06 | £4.18 | £4.11 | £0.06 | £4.17 | £-0.01 | -0.2% |

| Provider Ref | 2018/19 | | | 2019/20 | | | Total Funding Rate Difference v. 2018 | % Diff in Funding Rate |
|--------------|-------------------|--------------------------|------------|--------------------------------------|------------------------------------|-----------------------|---------------------------------------|------------------------|
| | Setting Base Rate | Setting Deprivation Rate | Total Rate | Universal Base Rate + UBR Protection | Setting Deprivation Rate ESTIMATED | Total Indicative Rate | | |
| 96 | £4.12 | £0.06 | £4.18 | £4.11 | £0.06 | £4.17 | £-0.01 | -0.2% |
| 98 | £4.12 | £0.12 | £4.24 | £4.11 | £0.13 | £4.24 | £0.00 | 0.0% |
| 99 | £4.12 | £0.05 | £4.17 | £4.11 | £0.05 | £4.16 | £-0.01 | -0.3% |
| 100 | £4.12 | £0.25 | £4.37 | £4.11 | £0.23 | £4.34 | £-0.02 | -0.6% |
| 101 | £4.12 | £0.61 | £4.73 | £4.11 | £0.64 | £4.75 | £0.02 | 0.5% |
| 102 | £4.12 | £0.54 | £4.66 | £4.11 | £0.53 | £4.64 | £-0.01 | -0.3% |
| 103 | £4.12 | £0.19 | £4.31 | £4.11 | £0.20 | £4.31 | £-0.01 | -0.2% |
| 104 | £4.12 | £0.15 | £4.27 | £4.11 | £0.15 | £4.26 | £-0.01 | -0.2% |
| 105 | £4.12 | £0.10 | £4.22 | £4.11 | £0.11 | £4.22 | £0.00 | 0.0% |
| 106 | £4.12 | £0.26 | £4.38 | £4.11 | £0.26 | £4.37 | £-0.01 | -0.3% |
| 107 | £4.12 | £0.22 | £4.34 | £4.11 | £0.23 | £4.34 | £0.00 | 0.1% |
| 110 | £4.12 | £0.11 | £4.23 | £4.11 | £0.13 | £4.24 | £0.00 | 0.1% |
| 112 | £4.12 | £0.19 | £4.31 | £4.11 | £0.19 | £4.30 | £-0.01 | -0.3% |
| 114 | £4.12 | £0.06 | £4.18 | £4.11 | £0.06 | £4.17 | £-0.01 | -0.2% |
| 115 | £4.12 | £0.13 | £4.25 | £4.11 | £0.13 | £4.24 | £-0.01 | -0.2% |
| 117 | £4.12 | £0.42 | £4.54 | £4.11 | £0.41 | £4.52 | £-0.03 | -0.6% |
| 118 | £4.12 | £0.05 | £4.17 | £4.11 | £0.05 | £4.16 | £-0.01 | -0.2% |
| 119 | £4.12 | £0.12 | £4.24 | £4.11 | £0.13 | £4.24 | £-0.01 | -0.2% |
| 120 | £4.12 | £0.13 | £4.25 | £4.11 | £0.13 | £4.24 | £-0.01 | -0.2% |
| 121 | £4.12 | £0.12 | £4.24 | £4.11 | £0.10 | £4.21 | £-0.03 | -0.7% |
| 123 | £4.12 | £0.05 | £4.17 | £4.11 | £0.05 | £4.16 | £-0.01 | -0.2% |
| 124 | £4.12 | £0.20 | £4.32 | £4.11 | £0.19 | £4.30 | £-0.02 | -0.4% |
| 126 | £4.12 | £0.37 | £4.49 | £4.11 | £0.36 | £4.47 | £-0.01 | -0.3% |
| 127 | £4.12 | £0.47 | £4.59 | £4.11 | £0.44 | £4.55 | £-0.04 | -0.9% |
| 128 | £4.12 | £0.33 | £4.45 | £4.11 | £0.32 | £4.43 | £-0.01 | -0.3% |
| 129 | £4.12 | £0.43 | £4.55 | £4.11 | £0.33 | £4.44 | £-0.11 | -2.4% |
| 130 | £4.12 | £0.36 | £4.48 | £4.11 | £0.36 | £4.47 | £-0.01 | -0.2% |
| 131 | £4.12 | £0.15 | £4.27 | £4.11 | £0.15 | £4.26 | £0.00 | -0.1% |
| 132 | £4.12 | £0.05 | £4.17 | £4.11 | £0.04 | £4.15 | £-0.02 | -0.4% |
| 134 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 135 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 137 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 139 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 141 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 145 | £4.12 | £0.28 | £4.40 | £4.11 | £0.33 | £4.44 | £0.04 | 0.9% |
| 147 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 154 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 156 | £4.12 | £0.44 | £4.56 | £4.11 | £0.37 | £4.48 | £-0.08 | -1.7% |
| 157 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 159 | £4.12 | £0.37 | £4.49 | £4.11 | £0.40 | £4.51 | £0.02 | 0.4% |
| 160 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 161 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 163 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 164 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 165 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 169 | £4.12 | £0.50 | £4.62 | £4.11 | £0.48 | £4.59 | £-0.03 | -0.7% |
| 172 | £4.12 | £0.76 | £4.88 | £4.11 | £0.75 | £4.86 | £-0.02 | -0.5% |
| 174 | £4.12 | £0.35 | £4.47 | £4.11 | £0.33 | £4.44 | £-0.03 | -0.6% |
| 176 | £4.12 | £0.13 | £4.25 | £4.11 | £0.14 | £4.25 | £0.00 | 0.0% |
| 177 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 182 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 183 | £4.12 | £0.30 | £4.42 | £4.11 | £0.34 | £4.45 | £0.04 | 0.8% |
| 186 | £4.12 | £0.71 | £4.83 | £4.11 | £0.67 | £4.78 | £-0.04 | -0.9% |
| 193 | £4.12 | £0.35 | £4.47 | £4.11 | £0.42 | £4.53 | £0.06 | 1.3% |
| 196 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 197 | £4.12 | £0.29 | £4.41 | £4.11 | £0.32 | £4.43 | £0.02 | 0.5% |
| 202 | £4.12 | £0.59 | £4.71 | £4.11 | £0.57 | £4.68 | £-0.03 | -0.5% |
| 213 | £4.12 | £0.60 | £4.72 | £4.11 | £0.62 | £4.73 | £0.02 | 0.3% |
| 214 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 217 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 220 | £4.12 | £0.53 | £4.65 | £4.11 | £0.55 | £4.66 | £0.00 | 0.1% |

| Provider Ref | 2018/19 | | | 2019/20 | | | Total Funding Rate Difference v. 2018 | % Diff in Funding Rate |
|--------------|-------------------|--------------------------|------------|--------------------------------------|------------------------------------|-----------------------|---------------------------------------|------------------------|
| | Setting Base Rate | Setting Deprivation Rate | Total Rate | Universal Base Rate + UBR Protection | Setting Deprivation Rate ESTIMATED | Total Indicative Rate | | |
| 221 | £4.12 | £0.50 | £4.62 | £4.11 | £0.49 | £4.60 | -£0.02 | -0.5% |
| 222 | £4.12 | £0.36 | £4.48 | £4.11 | £0.28 | £4.39 | -£0.09 | -1.9% |
| 223 | £4.12 | £0.28 | £4.40 | £4.11 | £0.29 | £4.40 | £0.00 | -0.1% |
| 225 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 227 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 228 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 231 | £4.12 | £0.40 | £4.52 | £4.11 | £0.32 | £4.43 | -£0.09 | -2.0% |
| 233 | £4.12 | £0.32 | £4.44 | £4.11 | £0.32 | £4.43 | -£0.02 | -0.4% |
| 235 | £4.12 | £0.09 | £4.21 | £4.11 | £0.09 | £4.20 | -£0.01 | -0.3% |
| 237 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 236 | £4.12 | £0.47 | £4.59 | £4.11 | £0.47 | £4.58 | -£0.02 | -0.4% |
| 238 | £4.12 | £0.33 | £4.45 | £4.11 | £0.33 | £4.44 | -£0.01 | -0.3% |
| 239 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 240 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 242 | £4.12 | £0.51 | £4.63 | £4.11 | £0.53 | £4.64 | £0.01 | 0.2% |
| 243 | £4.12 | £0.36 | £4.48 | £4.11 | £0.36 | £4.47 | -£0.01 | -0.3% |
| 245 | £4.12 | £0.56 | £4.68 | £4.11 | £0.52 | £4.63 | -£0.04 | -0.9% |
| 246 | £4.12 | £0.37 | £4.49 | £4.11 | £0.37 | £4.48 | -£0.02 | -0.4% |
| 247 | £4.12 | £0.31 | £4.43 | £4.11 | £0.28 | £4.39 | -£0.03 | -0.8% |
| 249 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 252 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 253 | £4.12 | £0.16 | £4.28 | £4.11 | £0.15 | £4.26 | -£0.02 | -0.4% |
| 254 | £4.12 | £0.55 | £4.67 | £4.11 | £0.53 | £4.64 | -£0.04 | -0.8% |
| 255 | £4.12 | £0.57 | £4.69 | £4.11 | £0.62 | £4.73 | £0.04 | 0.9% |
| 258 | £4.12 | £0.52 | £4.64 | £4.11 | £0.49 | £4.60 | -£0.04 | -0.8% |
| 259 | £4.12 | £0.30 | £4.42 | £4.11 | £0.34 | £4.45 | £0.03 | 0.7% |
| 260 | £4.12 | £0.33 | £4.45 | £4.11 | £0.33 | £4.44 | -£0.01 | -0.2% |
| 261 | £4.12 | £0.33 | £4.45 | £4.11 | £0.29 | £4.40 | -£0.05 | -1.1% |
| 262 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 263 | £4.12 | £0.34 | £4.46 | £4.11 | £0.35 | £4.46 | -£0.01 | -0.1% |
| 265 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 266 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 268 | £4.12 | £0.34 | £4.46 | £4.11 | £0.35 | £4.46 | £0.00 | 0.1% |
| 270 | £4.12 | £0.54 | £4.66 | £4.11 | £0.51 | £4.62 | -£0.04 | -0.8% |
| 273 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 274 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 275 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 276 | £4.12 | £0.29 | £4.41 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.3% |
| 277 | £4.12 | £0.45 | £4.57 | £4.11 | £0.44 | £4.55 | -£0.02 | -0.4% |
| 279 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 280 | £4.12 | £0.43 | £4.55 | £4.11 | £0.35 | £4.46 | -£0.10 | -2.2% |
| 281 | £4.12 | £0.28 | £4.40 | £4.11 | £0.31 | £4.42 | £0.02 | 0.5% |
| 282 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 283 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 284 | £4.12 | £0.36 | £4.48 | £4.11 | £0.33 | £4.44 | -£0.04 | -0.8% |
| 285 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 286 | £4.12 | £0.31 | £4.43 | £4.11 | £0.30 | £4.41 | -£0.02 | -0.6% |
| 287 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 288 | £4.12 | £0.39 | £4.51 | £4.11 | £0.39 | £4.50 | -£0.01 | -0.1% |
| 289 | £4.12 | £0.55 | £4.67 | £4.11 | £0.53 | £4.64 | -£0.03 | -0.7% |
| 290 | £4.12 | £0.32 | £4.44 | £4.11 | £0.23 | £4.34 | -£0.10 | -2.2% |
| 294 | £4.12 | £0.39 | £4.51 | £4.11 | £0.45 | £4.56 | £0.06 | 1.2% |
| 295 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 296 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 298 | £4.12 | £0.28 | £4.40 | £4.11 | £0.29 | £4.40 | -£0.01 | -0.1% |
| 299 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 300 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 303 | £4.12 | £0.32 | £4.44 | £4.11 | £0.39 | £4.50 | £0.06 | 1.4% |
| 306 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 308 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 310 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |

| Provider Ref | 2018/19 | | | 2019/20 | | | Total Funding Rate Difference v. 2018 | % Diff in Funding Rate |
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| | Setting Base Rate | Setting Deprivation Rate | Total Rate | Universal Base Rate + UBR Protection | Setting Deprivation Rate ESTIMATED | Total Indicative Rate | | |
| 312 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 313 | £4.12 | £0.28 | £4.40 | £4.11 | £0.31 | £4.42 | £0.02 | 0.4% |
| 315 | £4.12 | £0.49 | £4.61 | £4.11 | £0.45 | £4.56 | -£0.05 | -1.1% |
| 316 | £4.12 | £0.46 | £4.58 | £4.11 | £0.45 | £4.56 | -£0.02 | -0.4% |
| 317 | £4.12 | £0.33 | £4.45 | £4.11 | £0.31 | £4.42 | -£0.03 | -0.7% |
| 318 | £4.12 | £0.58 | £4.70 | £4.11 | £0.53 | £4.64 | -£0.06 | -1.3% |
| 320 | £4.12 | £0.55 | £4.67 | £4.11 | £0.48 | £4.59 | -£0.08 | -1.7% |
| 321 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 322 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 327 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 328 | £4.12 | £0.46 | £4.58 | £4.11 | £0.48 | £4.59 | £0.01 | 0.3% |
| 329 | £4.12 | £0.30 | £4.42 | £4.11 | £0.32 | £4.43 | £0.01 | 0.2% |
| 331 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 332 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 333 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 334 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 335 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 336 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 337 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 338 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 342 | £4.12 | £0.28 | £4.40 | £4.11 | £0.40 | £4.51 | £0.10 | 2.3% |
| 343 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 345 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 347 | £4.12 | £0.32 | £4.44 | £4.11 | £0.29 | £4.40 | -£0.03 | -0.8% |
| 349 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 351 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 352 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 353 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 354 | £4.12 | £0.28 | £4.40 | £4.11 | £0.41 | £4.52 | £0.11 | 2.5% |
| 356 | £4.12 | £0.54 | £4.66 | £4.11 | £0.42 | £4.53 | -£0.13 | -2.7% |
| 357 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 359 | £4.12 | £0.33 | £4.45 | £4.11 | £0.44 | £4.55 | £0.10 | 2.2% |
| 360 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 361 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 366 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 367 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 370 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 371 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 372 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 373 | £4.12 | £0.35 | £4.47 | £4.11 | £0.35 | £4.46 | -£0.01 | -0.2% |
| 374 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 375 | £4.12 | £0.14 | £4.26 | £4.11 | £0.14 | £4.25 | -£0.01 | -0.3% |
| 376 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 378 | £4.12 | £0.42 | £4.54 | £4.11 | £0.70 | £4.81 | £0.27 | 5.8% |
| 380 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 381 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 382 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 383 | £4.12 | £0.44 | £4.56 | £4.11 | £0.50 | £4.61 | £0.04 | 0.9% |
| 384 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 385 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 386 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 389 | £4.12 | £0.35 | £4.47 | £4.11 | £0.51 | £4.62 | £0.16 | 3.5% |
| 390 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 392 | £4.12 | £0.28 | £4.40 | £4.11 | £0.33 | £4.44 | £0.03 | 0.8% |
| 393 | £4.12 | £0.40 | £4.52 | £4.11 | £0.40 | £4.51 | -£0.02 | -0.3% |
| 394 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 398 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 399 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 400 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 414 | £4.12 | £0.18 | £4.30 | £4.11 | £0.19 | £4.30 | £0.00 | 0.0% |
| 416 | £4.12 | £0.31 | £4.43 | £4.11 | £0.28 | £4.39 | -£0.04 | -0.8% |

| Provider Ref | 2018/19 | | | 2019/20 | | | Total Funding Rate Difference v. 2018 | % Diff in Funding Rate |
|--------------|-------------------|--------------------------|------------|--------------------------------------|------------------------------------|-----------------------|---------------------------------------|------------------------|
| | Setting Base Rate | Setting Deprivation Rate | Total Rate | Universal Base Rate + UBR Protection | Setting Deprivation Rate ESTIMATED | Total Indicative Rate | | |
| 418 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 425 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 428 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 431 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 432 | £4.12 | £0.45 | £4.57 | £4.11 | £0.44 | £4.55 | £-0.02 | -0.5% |
| 410 | £4.12 | £0.28 | £4.40 | £4.11 | £0.29 | £4.40 | £0.00 | 0.0% |
| 437 | £4.12 | £0.36 | £4.48 | £4.11 | £0.38 | £4.49 | £0.01 | 0.2% |
| 433 | £4.12 | £0.49 | £4.61 | £4.11 | £0.37 | £4.48 | £-0.13 | -2.7% |
| 434 | £4.12 | £0.35 | £4.47 | £4.11 | £0.35 | £4.46 | £-0.01 | -0.2% |
| 445 | £4.12 | £0.27 | £4.39 | £4.11 | £0.27 | £4.38 | £-0.01 | -0.2% |
| 446 | £4.12 | £0.11 | £4.23 | £4.11 | £0.12 | £4.23 | £0.00 | 0.0% |
| 438 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 439 | £4.12 | £0.37 | £4.49 | £4.11 | £0.38 | £4.49 | £0.00 | 0.0% |
| 441 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 451 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 452 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 453 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 455 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 456 | £4.12 | £0.35 | £4.47 | £4.11 | £0.35 | £4.46 | £-0.01 | -0.2% |
| 457 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 458 | £4.12 | £0.28 | £4.40 | £4.11 | £0.29 | £4.40 | £-0.01 | -0.2% |
| 459 | £4.12 | £0.28 | £4.40 | £4.11 | £0.36 | £4.47 | £0.07 | 1.5% |
| 460 | £4.12 | £0.27 | £4.39 | £4.11 | £0.27 | £4.38 | £-0.01 | -0.2% |
| 465 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 467 | £4.12 | £0.28 | £4.40 | £4.11 | £0.34 | £4.45 | £0.05 | 1.0% |
| 401 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 402 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 406 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 409 | £4.12 | £0.62 | £4.74 | £4.11 | £0.58 | £4.69 | £-0.05 | -1.1% |
| 411 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 413 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 415 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 419 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 420 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 423 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 424 | £4.12 | £0.44 | £4.56 | £4.11 | £0.49 | £4.60 | £0.03 | 0.7% |
| 426 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 429 | £4.12 | £0.57 | £4.69 | £4.11 | £0.54 | £4.65 | £-0.05 | -1.0% |
| 430 | £4.12 | £0.45 | £4.57 | £4.11 | £0.53 | £4.64 | £0.07 | 1.6% |
| 440 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 448 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 450 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 461 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 463 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 464 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 469 | £4.12 | £0.35 | £4.47 | £4.11 | £0.35 | £4.46 | £-0.01 | -0.2% |
| 472 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 474 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 475 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 476 | £4.12 | £0.16 | £4.28 | £4.11 | £0.16 | £4.27 | £-0.01 | -0.1% |
| 483 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 485 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 486 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 488 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 491 | £4.12 | £0.36 | £4.48 | £4.11 | £0.36 | £4.47 | £-0.01 | -0.1% |
| 492 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 493 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 494 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 496 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 497 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 500 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |

| Provider Ref | 2018/19 | | | 2019/20 | | | Total Funding Rate Difference v. 2018 | % Diff in Funding Rate |
|--------------|-------------------|--------------------------|------------|--------------------------------------|------------------------------------|-----------------------|---------------------------------------|------------------------|
| | Setting Base Rate | Setting Deprivation Rate | Total Rate | Universal Base Rate + UBR Protection | Setting Deprivation Rate ESTIMATED | Total Indicative Rate | | |
| 501 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 502 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 504 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 505 | £4.12 | £0.28 | £4.40 | £4.11 | £0.37 | £4.48 | £0.07 | 1.7% |
| 506 | £4.12 | £0.29 | £4.41 | £4.11 | £0.47 | £4.58 | £0.17 | 3.8% |
| 507 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 508 | £4.12 | £0.39 | £4.51 | £4.11 | £0.60 | £4.71 | £0.20 | 4.4% |
| 509 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 510 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 511 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 514 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 515 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 517 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 518 | £4.12 | £0.35 | £4.47 | £4.11 | £0.35 | £4.46 | -£0.01 | -0.2% |
| 519 | £4.12 | £0.41 | £4.53 | £4.11 | £0.66 | £4.77 | £0.23 | 5.1% |
| 526 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 527 | £4.12 | £0.34 | £4.46 | £4.11 | £0.53 | £4.64 | £0.18 | 4.1% |
| 528 | £4.12 | £0.28 | £4.40 | £4.11 | £0.34 | £4.45 | £0.05 | 1.1% |
| 529 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 532 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 533 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 534 | £4.12 | £0.28 | £4.40 | £4.11 | £0.36 | £4.47 | £0.07 | 1.5% |
| 535 | £4.12 | £0.35 | £4.47 | £4.11 | £0.35 | £4.46 | -£0.01 | -0.2% |
| 524 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 536 | £4.12 | £0.35 | £4.47 | £4.11 | £0.35 | £4.46 | -£0.01 | -0.2% |
| 538 | £4.12 | £0.35 | £4.47 | £4.11 | £0.35 | £4.46 | -£0.01 | -0.2% |
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| 544 | £4.12 | £0.28 | £4.40 | £4.11 | £0.30 | £4.41 | £0.00 | 0.0% |
| 545 | £4.12 | £0.36 | £4.48 | £4.11 | £0.58 | £4.69 | £0.21 | 4.6% |
| 546 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 547 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 551 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 555 | £4.12 | £0.28 | £4.40 | £4.11 | £0.34 | £4.45 | £0.04 | 0.9% |
| 557 | £4.12 | £0.35 | £4.47 | £4.11 | £0.57 | £4.68 | £0.21 | 4.6% |
| 559 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 560 | £4.12 | £0.38 | £4.50 | £4.11 | £0.53 | £4.64 | £0.15 | 3.3% |
| 561 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 562 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 563 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 564 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 565 | £4.12 | £0.27 | £4.39 | £4.11 | £0.27 | £4.38 | -£0.02 | -0.3% |
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| 567 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 568 | £4.12 | £0.35 | £4.47 | £4.11 | £0.35 | £4.46 | -£0.01 | -0.2% |
| 531 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 569 | £4.12 | £0.35 | £4.47 | £4.11 | £0.35 | £4.46 | -£0.01 | -0.2% |
| 570 | £4.12 | £0.35 | £4.47 | £4.11 | £0.35 | £4.46 | -£0.01 | -0.2% |
| 572 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 581 | £4.12 | £0.35 | £4.47 | £4.11 | £0.35 | £4.46 | -£0.01 | -0.2% |
| 586 | £4.12 | £0.35 | £4.47 | £4.11 | £0.35 | £4.46 | -£0.01 | -0.2% |
| 574 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
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| 578 | £4.12 | £0.45 | £4.57 | £4.11 | £0.72 | £4.83 | £0.27 | 5.9% |
| 579 | £4.12 | £0.28 | £4.40 | £4.11 | £0.39 | £4.50 | £0.10 | 2.2% |
| 580 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
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| 583 | £4.12 | £0.28 | £4.40 | £4.11 | £0.44 | £4.55 | £0.15 | 3.3% |
| 585 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |

| Provider Ref | 2018/19 | | | 2019/20 | | | Total Funding Rate Difference v. 2018 | % Diff in Funding Rate |
|--------------|-------------------|--------------------------|------------|--------------------------------------|------------------------------------|-----------------------|---------------------------------------|------------------------|
| | Setting Base Rate | Setting Deprivation Rate | Total Rate | Universal Base Rate + UBR Protection | Setting Deprivation Rate ESTIMATED | Total Indicative Rate | | |
| 587 | £4.12 | £0.35 | £4.47 | £4.11 | £0.35 | £4.46 | -£0.01 | -0.2% |
| 521 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 525 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
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| 589 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
| 590 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
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| 642 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |
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| 646 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | -£0.01 | -0.2% |

| Provider Ref | 2018/19 | | | 2019/20 | | | Total Funding Rate Difference v. 2018 | % Diff in Funding Rate |
|--------------|-------------------|--------------------------|------------|--------------------------------------|------------------------------------|-----------------------|---------------------------------------|------------------------|
| | Setting Base Rate | Setting Deprivation Rate | Total Rate | Universal Base Rate + UBR Protection | Setting Deprivation Rate ESTIMATED | Total Indicative Rate | | |
| 647 | £4.12 | £0.27 | £4.39 | £4.11 | £0.27 | £4.38 | £-0.02 | -0.3% |
| 648 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
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| 651 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 652 | £4.12 | £0.36 | £4.48 | £4.11 | £0.39 | £4.50 | £0.02 | 0.4% |
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| 655 | £4.12 | £0.35 | £4.47 | £4.11 | £0.35 | £4.46 | £-0.01 | -0.2% |
| 656 | £4.12 | £0.35 | £4.47 | £4.11 | £0.35 | £4.46 | £-0.01 | -0.2% |
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| 553 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 667 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 669 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
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| 671 | £4.12 | £0.27 | £4.39 | £4.11 | £0.27 | £4.38 | £-0.02 | -0.3% |
| 672 | £4.12 | £0.35 | £4.47 | £4.11 | £0.35 | £4.46 | £-0.01 | -0.2% |
| 673 | £4.12 | £0.35 | £4.47 | £4.11 | £0.35 | £4.46 | £-0.01 | -0.2% |
| 674 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 675 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 676 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
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| 678 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| 679 | £4.12 | £0.35 | £4.47 | £4.11 | £0.35 | £4.46 | £-0.01 | -0.2% |
| 680 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
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| 694 | £4.12 | £0.35 | £4.47 | £4.11 | £0.35 | £4.46 | £-0.01 | -0.2% |
| 695 | £4.12 | £0.28 | £4.40 | £4.11 | £0.28 | £4.39 | £-0.01 | -0.2% |
| | | | £4.88 | | | £4.86 | £-0.02 | -0.5% |
| | | | £4.17 | | | £4.15 | £-0.01 | -0.3% |

SCHOOLS FORUM AGENDA ITEM

For Action



For Information



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

This report asks Members to agree the publication of the proposed consultation document on the High Needs Block funding model for 2019/20. This includes sight of the estimated number of places the Authority expects to commission and the arrangements for paying top up (Plus Element) funding.

Date (s) of any Previous Discussion at the Forum

The Forum considered the consultation on the 2018/19 high needs funding model on 18 October 2017 and set the High Needs Block budget in January 2018. High needs funding is regularly discussed by Members.

Background / Context

Please see Appendix 1 (the proposed consultation document itself) for the background to the proposals for the 2019/20 funding model.

This report focuses on High Needs Block technical and formula structure matters; how delegated budgets for individual providers are calculated and allocated in the 2019/20 financial year.

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 2019/20 and these are explained within the consultation document.

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. Presented to the Schools Forum on 19 September 2018 was an outline of a proposal for 4 cross-block actions to support the balancing of the High Needs Block in 2019/20, including a transfer of 0.5% from the Schools Block to the High Needs Block. This outline proposal was discussed in more detail with the Forum Members that attended one of the 3 Formula Funding Working Group meetings held at the beginning of October. This proposal is a significant part of the planned consultation on primary & secondary formula funding arrangements for 2019/20.

Details of the Item for Consideration

Consultation Document for Publication

Please see Appendix 1, which is the draft of the consultation paper setting out proposals for the funding of High Needs provision in 2019/20. This document includes information on how the funding system works.

The document (section 4) proposes continuity in most areas in 2019/20 but references especially the current review that is taking place on the funding approach to special schools, which will be highlighted for Members in the presentation of this report to the meeting.

Members are asked to consider the document and agree for this to be published. The outcomes of the consultation will be presented to the Forum in December and Members will be asked to make final recommendations on the structure of the funding model at this point.

Members will recall that we have in previous years published alongside the High Needs Block consultation a comparison of special school top up funding rates against national and statistical neighbour averages. The DfE's statistical release for 2018/19 data, which enables comparisons to be made and usually is available at the end of September, was published on 9 October. More considered comparisons will be presented to the Forum in December. An initial analysis indicates that our top up spending (as an amount per place) in special schools in 2018/19 closely matches national and statistical neighbour averages.

An Additional Note on Planned Places 2019/20

An indicative view of the number of places estimated to be funded in Bradford-located settings is given in Appendix 2 of the consultation document. These include the development of additional places. In summary:

Details of the Item for Consideration

- 2,327 SEND and 309 AP places (2,636 in total) are planned to be funded from the HNB for the 2019/20 academic year. This total excludes placements in out of authority and independent settings.
- This represents an increase of 114 places for the 2019/20 academic year on the places that were allocated within the 2018/19 HNB for the 2018/19 academic year.
- Looking slightly wider, 2,636 places for the 2019/20 academic year represents 688 more places in Bradford-located specialist settings than was initially planned to be funded from the HNB for the 2016/17 academic year (Document FO Appendix 1 presented to the Schools Forum 9 December 2015). This is the scale of the creation of places so far, and the scale of the additional cost within the HNB.
- The 688 separates as follows:
 - Special Schools + 294
 - Post 16 Further Education Sector + 218
 - DSPs (Primary & Secondary) + 115
 - PRUs + 55
 - Early Years DSPs + 10
 - ARCs - 4
- These places do not appear to have significantly altered our % of children and young people in special schools compared with national and other averages, although there has been movement. This is illustrated in the table below, albeit very simplistically. We have created a number of additional places in resourced provisions (DSPs), where the pupils are on the roll of the mainstream primary or secondary school not on the roll of a special school. So this position does require further exploration and analysis.

| | Special School Population % Jan 18 | Special School Population % Jan 15 |
|------------------------|--|--|
| Bradford | 1.1% | 0.9% |
| England | 1.4% | 1.2% |
| Statistical Neighbours | 1.4% | 1.3% |
| Met Districts | 1.6% | 1.4% |

For quick reference, approximately an additional 315 places in special schools (on Jan 18 numbers) would bring us to the statistical neighbour average of 1.4%. The planned SEMH free school will add 72 specialist places.

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

Yes – as referred to in Appendix 1.

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

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

Recommendations

The Forum is asked to agree to the publication of the proposed consultation on the High Needs Block funding model for 2019/20.

List of Supporting Appendices / Papers (where applicable)

Appendix 1 - Consultation on Funding High Needs Provision 2019/20 (with its appendices)

Contact Officer (name, telephone number and email address)

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INFORMATION AND CONSULTATION ON FUNDING HIGH NEEDS PROVISION **2019/20 FINANCIAL YEAR**

Document JM Appendix 1

1. Introduction

1.1 The purpose of this information and consultation document is to set out, and collect views on, the formula approach that Bradford Council proposes to use to delegate High Needs Block funding to providers in the 2019/20 financial year. This is known and referred to as our 'Place-Plus' system and has two parts: a) core (or place) funding and b) top-up (or plus) funding. This document provides a summary of high needs funding, what it pays for, and an explanation of the main ways this is allocated.

1.2 Bradford Council proposes for 2019/20 to continue the system that is currently in place, with the exception of possible amendment to the approach to the funding of special schools and special academies, which is currently in review and under discussion with the Schools Forum.

1.3 We would like to highlight that the Council has identified the benefit that holistic review of our top-up funding arrangements may have, in particular in insuring that our top-up funding continues to be based on clear descriptors of need, continues to follow our continuum of provision as this develops, and is allocated on accurate moderation of pupil-need. The Council expects to continue to develop and amend our Place-Plus system incrementally over time.

1.4 The deadline for responses to this consultation is Friday 30 November 2018. Please address all questions and responses to Andrew Redding 01274 432678 andrew.redding@bradford.gov.uk. A response form is included at Appendix 5.

2. Background

2.1 All local authorities are following a direction of travel set by the Department for Education (DfE) towards National Funding Formula. Significant changes to the way high needs provision is funded were required to be implemented by the DfE for the 2013/14 financial year. These changes, now well established, affected activities funded by the High Needs Block (HNB), which is a specific block of money within the Dedicated Schools Grant (the DSG) that amounts to about 12% of the overall DSG resources available to Bradford Council.

2.2 The high needs funding system supports provision for children and young people with special educational needs and disabilities (SEND) in line with the Children and Families Act 2014. High Needs Block DSG funding is also allocated to support good quality Alternative Provision for pre-16 pupils who cannot receive education in schools. The Children and Families Act 2014 extended the statutory duties local authorities hold relating to SEND across the 0 to 25 age range. Therefore, Bradford Council has a key role in determining the funding that is given to schools and other providers to meet the needs of children and young people with SEND.

2.3 Schools and other providers also have duties under the Act, in particular a duty to co-operate with their local authorities on arrangements for children and young people with SEND.

2.4 In 2018/19 Bradford Council received £65.88m High Needs Block funding within our DSG allocation. This figure incorporates the transfer of £5.7m that was made from the Schools Block to the High Needs Block in 2017/18. 90% of the £65.88m funding is delegated or devolved to support the following:

- Children and young people with Education Health and Care Plans (EHCPs) educated in mainstream schools, academies and free schools.

- Special schools and Special academies.
- Resourced units attached to maintained nursery schools.
- Resourced units attached to mainstream primary and secondary schools, academies and free schools.
- Pupil Referral Units (PRUs).
- Primary Behaviour Centres attached to mainstream primary schools and academies.
- Young people placed in independent alternative provision.
- Young people aged 16 to 25 in Further Education Colleges, 6th Form Colleges and with independent or specialist learning providers.
- Children and young people placed in independent and non-maintained special schools.
- Children and young people in hospital education.

2.5 High Needs Block funding in Bradford also supports central services relating to SEND and Alternative Provision, as permitted by the Finance Regulations, which includes SEND teaching support services that are accessed by schools and other providers and tuition for children and young people that are unable to attend school for medical reasons. Local authorities are permitted to continue to separately fund additional outreach and support services that may be managed centrally or may be devolved to providers under service level agreements.

2.6 The DfE's National Funding Formula however, does not introduce a provider-level national formula for High Needs Block funded providers. Local authorities continue to have responsibility for the management / formula funding of High Needs Block (HNB) provisions. The DfE sees the importance of local authorities (and high needs providers) finding significant efficiencies in their provisions, including collaborative arrangements.

3. DfE-Led Changes in the National High Needs Funding System 2019/20

3.1 The 2019/20 national Place-Plus system is basically the same as operated in 2018/19. The DfE has confirmed within its guidance only limited optional changes to the operation of the national Place-Plus system for post 16 provisions in 2019/20. These are related to how local authorities can agree with post 16 providers how element 2 (£6,000) funding is allocated. At this stage, our response to these optional changes is to further explore them, with a view to developing more flexible agreements, if this will add value to our funding system, for implementation in 2020/21. We are not be in a position to satisfactorily conclude review and reach agreement prior to the deadline of 16 November 2018 to inform the ESFA of alternative arrangements for the funding of academies and further education settings. We are also concerned to ensure that our review properly takes account of demographic changes forecasted in future years as well as the development of the post 16 curriculum, including supported internships. In this context, we must also bring in a review of element 3 (top up funding).

3.2 The DfE has indicated that it will publish in October a consultation on the funding of hospital provision. At the time of writing this document, this consultation has not begun. The DfE has not confirmed whether or not planned changes would be implemented for 2019/20. So there uncertainty in this area at this time. We believe that the primary purpose the DfE's consultation is to discuss how provision for children not able to attend school on medical grounds is funded at DSG level. However, this is likely to have knock-on implications for the funding of education in hospital provisions. We will respond as quickly as possible to the DfE's consultation and will talk further with the Schools Forum and affected provisions.

3.3 There are some other potential developments going forward in the national high feeds funding system, which it is important not to lose sight of:

- The DfE is considering options for the review of alternative provision and is expected will publish plans on this. This may affect how the different kinds of AP provider are funded.
- The DfE is working to better 'describe' SEND needs, responsibilities and costs, replacing the concept of a 'notional SEND budget', which will influence future policy on high needs funding. There is no timescale currently for the release of further information about policy development in this area. There is no response to this work within the 2019/20 arrangements.

4. Bradford's 2019/20 Proposed Arrangements: High Level Summary

4.1 As stated in paragraph 1.2, Bradford Council proposes for 2019/20 to continue the system that is currently in place, with the exception of possible amendment to the approach to the funding of special schools and special academies.

4.2 The Council continues to hold the view that, given the extent of discussion that is taking place about the District's SEND model, and the changes that have already taken place and may come from these discussions, continuity generally in funding in 2019/20 will be welcomed, especially in mainstream settings. Any further change in the funding model should be managed incrementally following holistic re-assessment.

4.3 The Council expects in 2019/20 to consolidate the changes that were made in 2018/19 in the funding of alternative provision, namely, the cessation of the funding from the High Needs Block of the top-up element for non-EHCP placements. The Council will continue to work with schools, in particular the primary phase, to develop local agreements.

4.4 The Council anticipates that the values of funding allocated in 2019/20 by our Pupil-Led Need top-up Ranges Model (see Appendix 4) will be the same as allocated in 2018/19 i.e. will be cash flat, noting that the review of special school funding (see 4.7 below) may alter the ranges model used for special schools in 2019/20.

4.5 Following further analysis and benchmarking work, the Council proposes to continue to use our existing methodology for the definition of notional SEND budgets for mainstream primary and secondary schools and academies within the Schools Block funding formulae. Please see Appendix 3.

4.6 Also following further analysis, the Council proposes to continue to protect SEND Floor allocations for primary and secondary schools and academies at 2017/18 levels, subject to the conclusion of the discussions that are to take place with the Schools Forum on the transfer of Schools Block monies to the High Needs Block in 2019/20. Please see Appendix 3. The Council has identified that we need to find a better way of calculating additional mainstream SEND funding support now that we have moved to National Funding Formula. So review is planned by April 2020 and this will be discussed with the Schools Forum. This review most likely may not result in a change in the total value of support overall that will continue to be funded, but may result in this support being more concentrated. However, we wish to ensure continuity in 2019/20.

4.7 The Council is currently working with the District Achievement Partnership (DAP) on a review of the funding of special schools and special academies, which incorporates a review of our Top-Up Ranges Model, and which is anticipated will be introduced in pilot for 2019/20. This work is still at the review stage and is under discussion with the Schools Forum. One of the key aims of the review is to better align the EHCP 'funding result' to the needs of the pupil. This review may mean that we take a different approach to the funding of special schools and special academies in 2019/20, which may include applying an adjusted Top-Up Ranges Model (a model that has more steps and different funding values). If a new model is agreed with the Schools Forum, and is successful in its pilot period, the Authority would naturally look to implement the revised approach incrementally from April 2020 across all mainstream and specialist settings, including Further Education Colleges, in order to maintain the continuum of funding. This may mean, for example, that there are a greater number of funding steps, at different values, for mainstream pupils assessed at Range 4. The Council will also bring in a review of the new additional flexibility provided for the funding of element 2 at post 16. However, we do not propose to change the funding model, except for special schools, in 2019/20.

5. Place (or Core) Funding

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

5.2 High needs funding has two parts a) core (or place) funding and b) top-up (or plus) funding. The grid at Appendix 1 sets out in summary how this system operates, and how these two parts work together, for each main type of school or provider.

5.3 Core (or place) funding for Bradford's stand alone maintained special schools and special academies, and for PRUs including Tracks, and the primary behaviour centres, is set at the national annual value of £10,000 for pre-16 aged placements. The value for post 16 placements in special schools and academies is slightly enhanced by the higher value of element 1 funding in the post 16 national funding formula. Place funding is allocated on the agreed number of places commissioned both by Bradford Council and by other local authorities. A Bradford-located institution is allocated place funding by Bradford Council for its total number of high needs places irrespective of where the pupil resides. This place funding is allocated to support the institution's core costs (element 1) and also to contribute to the additional costs associated with meeting the additional needs of the child or young person (element 2). However, it is not 'pupil specific'. Place funding is set before the start of the financial year and isn't withdrawn if an individual place is not occupied. It is up to the institution to decide how best to apportion their total allocated place funding across the actual number of places commissioned by local authorities. Additional place funding, where an institution's number on roll exceeds the number of places during the year, is allocated by Bradford Council. An end of year reconciliation is actioned however, which means that an institution's place funding will be reduced if the institution has been allocated too much additional place funding when its actual annual composite occupancy is calculated.

5.4 Place funding for Bradford's resourced units (DSPs, ARCs and Early Years DSPs), and for post 16 placements in Further Education Colleges, operates on the basis set out in paragraph 5.3 but is set at the national annual value of £6,000. The value is not £10,000 because these institutions already receive formula funding, which allocates the first element of place funding (known as element 1). To explain then, how place funding is split into 2 parts in the national system:

- Element 1: a basic £4,000 for children and young people aged pre-16, which is the defined value of funding that all pupils attract and which has already been allocated within the pre-16 funding formula, or Early Years Single Funding Formula (EYSFF), for an institution's core costs. This formula allocation is derived from the annual October Census (pre-16 formula) and from the 3 termly censuses (EYSFF). For post 16 students, this element 1 is derived from the national post 16 funding formula and typically is greater than £4,000 (notionally defined at £5,000). Element 1 across the post 16 sector is funded with a year's lag in pupil numbers. For example, the total allocation of element 1 for the 2019/20 academic year will be based on the number of students recruited in 2018/19.
- Element 2: a further £6,000 for additional needs, which is not already allocated:
 1. within the formula funding received by Bradford's mainstream schools and academies that have resourced units (DSPs and ARCs) where local authorities commission high needs places.
 2. within the formula funding received by Bradford's maintained nursery schools that have resourced units where local authorities commission high needs places. £6,000 is the value for 1 FTE place. Therefore, a 15 hour place = 0.6 FTE (£3,600) and a 30 hour place = 1.2 FTE (£7,200).
 3. within the formula funding received by Bradford's Further Education Colleges where local authorities commission high needs places post 16.

5.5 The national funding system includes an additional complexity in the calculation of place funding for resourced units in mainstream primary and secondary schools and academies. The value of a place is set at £6,000 where the place is occupied at the time the October Census is taken. Where a place is not occupied at this Census, local authorities are required to fund this place at £10,000. This is because the school or academy will not receive element 1 funding for this place in the following financial year in its formula funding. For maintained nursery schools, an adjustment is made to the termly funding allocated via the EYSFF to add element 1 funding for resourced unit places that are not occupied where these are being held open by the school.

5.6 The physical payment of place funding by Bradford Council takes place on a monthly basis and is combined with the monthly payment of top-up funding, which is described in paragraph 7. Bradford Council published monthly funding statements for providers to access. For some institutions, such as academies and Further Education Colleges, place funding is not directly allocated by Bradford Council. Instead, the Education Skills and Funding Agency (ESFA) deducts the place funding from the Council's DSG to pay this directly.

5.7 Mainstream primary and secondary schools and academies do not receive additional place funding for children and young people that have EHCPs. The high need funding system works on the basis that schools and academies have sufficient funding already within their delegated formula funding allocations to enable them to meet the additional costs of the SEND needs of their pupils up to the threshold of £6,000 per pupil, using their funding calculated on measures of additional need such as Free School Meals, IDACI and prior low attainment. Local authorities are currently required to define for each primary and secondary school the value of their formula funding that is 'notionally' allocated for SEND to be used in meeting the first £6,000 of needs for pupils with EHCPs, as well as the needs of pupils without EHCPs. The value of each school's notional SEND budget is clearly set out in the annual S251 statements Bradford Council publishes. Please see Appendix 3. A separate 'SEND Floor' mechanism in our approach currently ensures that all mainstream primary and secondary schools and academies receive a minimum amount of SEND formula funding, compared against the value of EHCPs of children at a school or academy. In effect, the SEND Floor provides a top up for schools and academies with higher numbers of individual EHCPs at a value greater than £6,000 that have generally lower levels of FSM and IDACI and higher levels of attainment. The values of SEND Floor allocations, and the basis of the calculation, are clearly set out for each school in the monthly high needs funding statements the Council publishes. Please see Appendix 3.

5.8 For providers delivering the entitlements to early education to 2, 3 and 4 year olds (maintained nursery schools, nursery classes in primary schools and academies and Private, Voluntary and Independent providers), Bradford Council allocates element 1 funding using our Early Years Single Funding Formula (EYSFF), which is funded by our Early Years Block within the DSG. The Council has put in place an Early Years SEND Inclusion Fund, also funded from the Early Years Block, which enables additional funding to be allocated to support children with low level emerging SEND. This basis of this fund is to replicate the £6,000 element 2 place funding for eligible early years children that is not already funded within the EYSFF. Further details on the Early Years SEND Inclusion Fund can be found on Bradford Schools Online. In addition, early years providers of the 3 and 4 year old entitlement are entitled to receive a one off payment of £615 per year for children eligible for the Disability Access Fund (DAF). Further details on DAF can be found in our Early Years Technical Statement [here](#).

5.9 Place funding for education in hospital provision, nationally, has still to be brought into the Place-Plus methodology. Currently, local authorities are required to maintain prior-year place funding values. The rate of funding per place Bradford Council has set in 2018/19 is £18,465. The DfE consultation on the approach to the funding of hospital provision going forward is still to be published and review.

5.10 The funding of independent schools has also not yet been brought into the national Place-Plus funding system. The basis of funding of placements in these settings is open to market forces and will reflect a number of factors, including the needs of the child, place availability and negotiation.

6. Number of Commissioned Places 2019/20

6.1 Bradford Council's DSG High Needs Block planned budget currently assumes that the places that are set out in Appendix 2 will be commissioned in 2019/20.

6.2 These numbers include:

- For individual SEND settings, the greater of either actual occupancy at October 2018 or the 2018/19 planned places total, with some adjustments to individual settings for known specific changes and planned increases and reductions.
- The continuation and full year impact of the additional places that have been created between April 2018 and April 2019, which are now allocated to individual settings.

- 79 additional SEND places to be created from April 2019 in Special schools and DSPs, including the establishment of 4 new DSP provisions.
- An estimate of the number post 16 places in Further Education Colleges for the 2019/20 academic year, based on current occupancy information and incorporating the establishment of 2 new post 16 providers at September 2019.
- The number of subsidised alternative provision places taken from the agreements that were reached in 2018/19. Bradford Council has agreed to fund in 2018/19:
 - 50 lots of place funding at Bradford Central PRU, of which 10 places are assigned for support for pupils permanently excluded (where the Council will also pay the Pupil-Led Need top-up).
 - 160 lots of place funding in total across Bradford District PRU and independent alternative providers. There are some transitional arrangements in place with regard to the funding of Pupil-Led Need top up at Bradford District PRU. From 1 September 2019, all top-up will be funded by the commissioning schools (or BACs) not by the High Needs Block.
 - 50 lots of place funding across the Primary Behaviour Centres, of which 8 places are assigned for support for pupils permanently excluded and 5 for pupils with SEND EHCPs (where the Council will also pay the Pupil-Led Need top-up).

6.3 The Council will continue to firm up the forecast of places over the autumn term and will talk to providers, prior to agreeing the DSG's provision with the Schools Forum for 2019/20 on 9 January 2019. A revised planned places list will be presented to the Schools Forum in December 2018.

6.4 Within the 2019/20 planned budget estimates, the Council also forecasts a growth in High Needs Block spending from a continuing increase in the number of pupils with EHCPs in mainstream primary and secondary schools and academies and from a continuing increase in the number of children and young people placed in independent and non-maintained special schools.

7. Top-Up Funding: Pupil-Led Need

7.1 Top-up funding (also known as Element 3) is the funding required by an institution, over and above place funding, to enable a child or young person with high needs to participate in education and learning. Top-up funding should reflect the cost of additional support an institution incurs related to the individual needs of the child or young person. In this document this is called 'Pupil-Led Need'. Top-up funding can also reflect costs (and differences in costs) related to the setting that the child or young person is placed at and can also take account of the real time occupancy of places at a setting. In this document this is called 'Setting-Led Need' and this is discussed further in paragraph 8.

7.2 Although most children and young people receiving high needs funding will have an EHCP, local authorities have the flexibility to provide high needs funding outside the statutory assessment process for all children and young people up to the age of 19. The statutory assessment process is, therefore, not the sole means of securing additional support for children and young people with SEND. Bradford Council allocates an element of High Needs Block funding to support schools in managing the needs of children and young people that do not have EHCPs, in particular in funding the place element for alternative provision in the PRUs. Inclusion funding is also allocated from the Early Years Block to support early years-aged children with lower level emerging SEND. However, due to increasing budget pressure, the Council, with the Schools Forum, has agreed for the High Needs Block to step back from meeting the cost of top-up funding for children and young people that are placed in alternative provisions that do not have an EHCP and / or remain on the role of the school or academy. Placing schools (through the BACs in the secondary sector) are required to meet the top-up cost using their element 2 funding within their formula funding allocations. This change, which began at 1 September 2018, has simply removed the 'double funding' of these placements in both the Schools Block and the High Needs Block that was previously present.

7.3 Top-up funding for children and young people with EHCPs is paid by the placing local authority. Bradford Council is responsible for funding the top-up for children and young people with EHCPs that are resident in Bradford and that we place either in Bradford-located settings or elsewhere. Institutions in Bradford are

required by the national system to recover for themselves the top-up funding relating to children and young people placed with them by other local authorities.

7.4 Bradford Council allocates Pupil-Led Need top-up for children and young people with EHCPs following an agreed Ranges Funding Model. This model is attached at Appendix 4. This model is used to assign pupils into categories of need for funding purposes. Each range has an applicable level of funding, and every pupil assigned to a range is allocated the set value of funding. The Council's intention has been to establish a single uniform framework for calculating top-up funding. The Council's expectation is that this framework will categorise the vast majority of pupils and will thus ensure consistency in the approach to the funding of high needs in mainstream and specialist settings both pre and post 16. It is accepted that there will be a small number of children or young people that will sit outside this Ranges framework; most of whom will be placed in specialist independent provisions.

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

7.6 Because the funding of hospital education currently has not been brought within the national Place Plus system, and places are funded at higher set value of £18,465, additional top-up funding is not allocated to education in hospital provision.

7.7 A total value of top-up funding owed to an institution by Bradford Council, calculated using the Ranges Model, for all EHCP placements, is calculated and paid on a monthly basis. The calculation is based on the institution's occupancy recorded on the 10th day of each month. Where a child or young person is admitted after the 10th, top-up funding begins from the next month.

- For any errors in the data for a single month, or where the position has been estimated due to the most up to date data not being available (at September, picking up all changes for the new academic year), retrospective adjustments are made in the subsequent month's calculation.
- Funding for August repeats the position recorded for July, except for Further Education placements, where August's funding is based on the new academic year's position.
- A ready reckoner is available, which helps institutions predict the impact on top-up funding of movements in pupil numbers / ranges on a monthly basis.
- Bradford Council also published monthly funding statements for providers to access.

7.8 The process for placing children and young people with EHCPs into the Ranges Model is led by the Council, via its established Panels, using the primary need data that is held and the descriptors of need that have been agreed by school and provider colleagues and that have been applied for funding purposes for a number of years.

- The Council reviews existing EHCPs pupil populations and discusses the outcomes of this with each setting.
- Children and young people that have been placed whilst EHCP assessment is taking place are funded initially at Range 4D.
- All placements in the resourced units attached to maintained nursery schools are funded at Range 4D.
- The Council tracks the movement of children between settings and re-calculates funding on a monthly basis. SEND Services provides to each setting a list of pupils on roll and their funding range by the 5th day of each month. Any discrepancies in that month's data are resolved at this point, before the 10th of

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

- Adjustments to reflect changes in the needs of individual children, where an issue has been raised by a setting, are referred to the SEND Strategic Manager / Assessment Manager. If agreement is not reached, the SEND Panel is asked to make a final decision. Where changes are agreed, funding is updated from the next applicable month.
- The Council is increasingly rolling out the [‘My Support Plan’](#) initiative, which enables early access to additional funds for children with SEND.
- The DfE, in its current operational guidance, states its expectation that the top-up for non-EHCP placements in alternative provisions are managed on a formulaic basis, rather than with reference to the individually identified need of pupils. Currently, there is agreement in place that top-up for these placements is calculated at 50% Range 4D and 50% Range 5. This is the rate of funding that will be used by the Council in funding top-up relating to the placement in the PRUs and the Primary Behaviour Centres of children and young people permanently excluded.

7.9 The DSG Finance Regulations provide for a Minimum Funding Guarantee (MFG) for special schools and academies, which is invoked when an authority substantially amends its approach to top-up funding to the extent that this would reduce the budget of a special school or academy by more than a set threshold. As Bradford Council has not recently altered its Ranges Model, this MFG has not been required. However, it may come into play where the special school funding formula is amended in 2019/20 following the current review. The Council will consider this more closely but will always comply with the requirements of the MFG or will seek exemption from the ESFA where it is agreed that this will help deliver a better transition.

8. Top-Up Funding: Setting-Led Need in Specialist Settings

8.1 Top-up funding can reflect costs (and differences in costs) related to the setting that the child or young person is placed at. In this document this is called ‘Setting-Led Need’.

8.2 Place-funding is expected to meet a school’s basic core costs. However, our current funding model recognises that there are certain differences in a school’s cost base that are influenced by the features of the setting. Two simple examples are that the setting is small and requires additional funding to meet basic core costs of a fixed nature and the setting operates across a split-site and therefore, has certain duplicated costs.

8.3 Appendix 3 sets out in more technical detail these factors within Bradford Council’s current funding approach and how and where they are applied.

8.4 These factors are in summary, for:

- Special schools and special academies: split sites; post 16 element 1 enhancement; new services delegation; small setting protection; 3% cash budget protection.
- Resourced Units (DSPs and ARCs) attached to mainstream primary and secondary schools and academies: small setting protection; new services delegation (ARCs only, not the DSPs); 3% cash budget protection.
- PRUs: Business Rates; new services delegation (Ellar Carr and Primary PRU only); small setting protection (Ellar Carr and Primary PRU only).
- Mainstream primary and secondary schools and academies: SEND Funding Floor.

8.5 Setting-Led Need top-up is calculated alongside Pupil-Led Need top-up on a monthly basis following the same timetable set out in paragraph 7.7.

8.6 No Setting-Led Need top-up is allocated to: early years resourced provision in maintained nursery schools; Further Education Colleges; hospital education; independent alternative providers; the primary behaviour centres.

9. Consultation Responses

9.1 This is relatively simple consultation. Providers are simply asked whether they agree to the continuation of our current funding system on that basis summarised in section 4 of this document.

9.2 Please use the responses form at Appendix 5 to submit your views. There is space in this form for you to comment on any aspect of the proposals. If you wish to discuss these proposals in more detail, or have any specific questions, please contact Andrew Redding using the contact details shown in paragraph 1. Please ensure that your response is submitted by the deadline of **Friday 30 November 2018**.

10. Next Steps

10.1 The Schools Forum will make final recommendations on the approach to the funding of high needs provision for the 2019/20 financial year on 9 January 2019. These recommendations will be made following consideration of the responses receive to this consultation and once the value of DSG funding allocated to the Authority for 2019/20 has been confirmed.

10.2 Subject to the agreement of Council, the recommended approach will be used to allocate DSG funding from 1 April 2019.

11. Appendices

| | |
|------------|---|
| Appendix 1 | Summary of the Place-Plus system and how this works for different providers |
| Appendix 2 | 2019/20 Planned Funded Places (Bradford-located settings) |
| Appendix 3 | Technical Annex |
| Appendix 4 | Bradford's Pupil-Led Need Top Up Funding Ranges Model 2018/19 |
| Appendix 5 | Consultation Responses Form |

Appendix 1 – Summary of Place-Plus and how this works for different providers in Bradford

| Type of Provision | Pre-16 Place (Core) Funding | Pre-16 Top-Up Funding (Pupil-Led Need) | Post-16 Place Funding | Post-16 Top-Up Funding (Pupil-Led Need) | Setting-Led Need Factors | Additional Support Measures |
|---|--|--|--|--|--------------------------|--|
| Mainstream primary & secondary (schools, academies and free school) | <p>Element 1 is included within the per-pupil funding allocated through the local school funding formula (NFF).</p> <p>Element 2 - the first £6,000 of additional support cost – is also already delegated with the school's formula funding allocation.</p> <p>Notional SEND defines the value of funding already allocated (see appendix 3).</p> | <p>Agreed per-pupil top up paid by the commissioning local authority.</p> <p>Allocated in 'real time' during the year. Changes for starters and leavers.</p> <p>Bradford uses a Ranges Model (see appendix 4).</p> | <p>Element 1 (based on the 16-19 national funding formula) plus Element 2 (£6,000) based on the number of places to be funded.</p> | <p>Agreed per-pupil top up paid by the commissioning local authority.</p> <p>Allocated in 'real time' during the year. Changes for starters and leavers.</p> <p>Bradford uses a Ranges Model (see appendix 4).</p> | None. | <p>SEND Funding Floor (see appendix 3).</p> <p>My Support Plan</p> |
| Mainstream early years (schools, classes and PVI) | <p>Element 1 included within the per-pupil funding allocated through the local EYSFF.</p> <p>Early Years SEND Inclusion Fund allocates Element 2 (£6,000) for eligible low level emerging</p> | <p>Agreed per-pupil top up paid by the commissioning local authority.</p> <p>Allocated in 'real time' during the year. Changes for starters and leavers.</p> <p>Bradford uses a</p> | n/a | n/a | None. | <p>Early Years SEND Inclusion.</p> <p>DAF Grant.</p> |

| | | | | | | |
|---|---|---|---|---|---|-------|
| | SEND. | Ranges Model (see appendix 4). | | | | |
| DSP Units (mainstream primary & secondary) | Element 1 & 2 is allocated through a combination of per-pupil funding allocated through the local schools funding formula plus £6,000 per place for those occupied by pupils on roll in October and £10,000 per place for the remainder of places to be funded. | Agreed per-pupil top up paid by the commissioning local authority. Allocated in 'real time' during the year. Changes for starters and leavers. Bradford uses a Ranges Model (see appendix 4). | Element 1 (based on the 16-19 national funding formula) plus Element 2 (£6,000) based on the number of places to be funded. | Agreed per-pupil top up paid by the commissioning local authority. Allocated in 'real time' during the year. Changes for starters and leavers. Bradford uses a Ranges Model (see appendix 4). | Small Setting Protection. 3% Cash Budget Protection. | None. |
| ABC Units (mainstream primary & secondary) The provision is centrally managed by Bradford Council and element 2 and top-up funding is retained. | Element 1 & 2 is allocated through a combination of per-pupil funding allocated through the local schools funding formula plus £6,000 per place for those occupied by pupils on roll in October and £10,000 per place for the remainder of places to be funded. | Agreed per-pupil top up paid by the commissioning local authority. Allocated in 'real time' during the year. Changes for starters and leavers. Bradford uses a Ranges Model (see appendix 4). | Element 1 (based on the 16-19 national funding formula) plus Element 2 (£6,000) based on the number of places to be funded. | Agreed per-pupil top up paid by the commissioning local authority. Allocated in 'real time' during the year. Changes for starters and leavers. Bradford uses a Ranges Model (see appendix 4). | New Services Delegation. Small Setting Protection. 3% Cash Budget Protection. | None. |
| DSP Units (maintained nursery schools) | Element 1 & 2 is allocated through a combination of per-pupil funding allocated through the local EYSFF funding formula plus | Agreed per-pupil top up paid by the commissioning local authority. Allocated in 'real time' during the year. | n/a | n/a | None. | None. |

| | | | | | | |
|-------------------------------------|--|---|--|--|---|-------|
| | <p>£6,000 per place.</p> <p>Element 1 funding is paid via EYSFF for places held open.</p> | <p>Changes for starters and leavers.</p> <p>Bradford uses a Ranges Model (see appendix 4). All EY DSP places are funded at Range 4D.</p> | | | | |
| Special Schools & Special Academies | <p>£10,000 per place based on an agreed number of places.</p> <p>Additional place-funding is allocated where occupancy exceeds with an end of year reconciliation.</p> | <p>Agreed per-pupil top up paid by the commissioning local authority.</p> <p>Allocated in 'real time' during the year. Changes for starters and leavers.</p> <p>Bradford uses a Ranges Model (see appendix 4).</p> | <p>£10,000 per place based on an agreed number of places.</p> <p>Additional place-funding is allocated where occupancy exceeds with an end of year reconciliation.</p> | <p>Agreed per-pupil top up paid by the commissioning local authority.</p> <p>Allocated in 'real time' during the year. Changes for starters and leavers.</p> <p>Bradford uses a Ranges Model (see appendix 4).</p> | <p>Split Sites</p> <p>Post 16 element 1 enhancement.</p> <p>New Services Delegation.</p> <p>Small Setting Protection.</p> <p>3% Cash Budget Protection.</p> | None. |
| Primary Behaviour Centres | <p>£10,000 per place based on an agreed number of places.</p> | <p>Agreed per-pupil top up paid by the commissioning local authority or school.</p> <p>Allocated in 'real time' during the year. Changes for starters and leavers.</p> <p>Bradford uses a Ranges Model (see appendix 4 – formulaic approach).</p> | n/a | n/a | None. | None. |
| PRUs – non-EHCP | <p>£10,000 per place</p> | <p>Agreed per-pupil top</p> | n/a | n/a | Business Rates. | None. |

| | | | | | | |
|--|--|---|-----|-----|---|-------|
| provision (Bradford District PRU & Bradford Central PRU) | based on an agreed number of places. | <p>up paid by the commissioning local authority or school (BACs).</p> <p>Allocated in 'real time' during the year. Changes for starters and leavers.</p> <p>Bradford uses a Ranges Model (see appendix 4 – formulaic approach).</p> | | | | |
| PRUs – EHCP provision (Ellar Carr and Primary PRU) | <p>£10,000 per place based on an agreed number of places.</p> <p>Additional place-funding is allocated where occupancy exceeds with an end of year reconciliation.</p> | <p>Agreed per-pupil top up paid by the commissioning local authority.</p> <p>Allocated in 'real time' during the year. Changes for starters and leavers.</p> <p>Bradford uses a Ranges Model (see appendix 4).</p> | n/a | n/a | <p>Business Rates.</p> <p>New Services Delegation.</p> <p>Small Setting Protection.</p> | None. |
| Hospital Education | £18,465 per place based on an agreed number of places. | No additional top-up is allocated. | n/a | n/a | None. | None. |
| Tracks | £10,000 per place based on an agreed number of places. | A fixed amount of top-up is allocated to ensure a fixed budget allocation. This is not adjusted during the year (for actual | n/a | n/a | None. | None. |

| | | | | | | |
|---|--|--|--|--|-------|-------|
| | | occupancy). | | | | |
| Further Education Institutions, special institutions and ILPs (post 16) | n/a | n/a | <p>Element 1 (based on the 16-19 national funding formula) plus Element 2 (£6,000) based on the number of places to be funded.</p> <p>Additional place-funding (element 2 only) can be allocated where occupancy exceeds with an end of year reconciliation.</p> | <p>Agreed per-pupil top up paid by the commissioning local authority.</p> <p>Allocated in 'real time' during the year. Changes for starters and leavers.</p> <p>Bradford uses a Ranges Model (see appendix 4). Typically values are funded at 60% for most placements.</p> | None. | None. |
| Independent Schools | The place funding system doesn't operate in independent schools. | Agreed per-pupil top up paid by the commissioning local authority. | The place funding system doesn't operate in independent schools. | Agreed per-pupil top up paid by the commissioning local authority. | None. | None. |

DSG 2019/20 - High Needs Block Local Authority Funded Planned Places (Bradford-located Settings)

Appendix 2

| Setting | Type (AP or SEND) | Oct 18 Authority Funded Places Occupancy (FTE) | 18/19 Initial Planned Budget AY LA Funded Places (FTE) | 19/20 FY Apr-Aug Updated LA Funded Planned Places (FTE) | 19/20 AY Initial LA Funded Planned Places (FTE) | Diff 19/20 AY vs. 18/19 AY |
|--|-------------------|--|--|---|---|----------------------------|
| Bradford Central PRU | AP | 10.0 | 50.0 | 50.0 | 50.0 | 0.0 |
| Bradford District PRU | AP | 80.0 | 160.0 | 80.0 | 80.0 | -80.0 |
| Ellar Carr | SEND | 70.0 | 90.0 | 72.0 | 72.0 | -18.0 |
| Primary PRU | SEND | 51.0 | 56.0 | 56.0 | 56.0 | 0.0 |
| Other Alternative Providers (balance of ex District PRU Places) | AP | 36.0 | | 80.0 | 80.0 | 80.0 |
| Willow Centre | AP | 2.0 | 10.0 | 10.0 | 10.0 | 0.0 |
| Horizons Centre | AP | 2.0 | 10.0 | 10.0 | 10.0 | 0.0 |
| Silver Birch Centre | AP | 2.0 | 10.0 | 10.0 | 10.0 | 0.0 |
| Phoenix Centre | AP / SEND | 2.0 | 20.0 | 20.0 | 20.0 | 0.0 |
| Early Years DSP - Abbey Green Nursery School | SEND | 10.0 | 12.0 | 12.0 | 12.0 | 0.0 |
| Early Years DSP - Canterbury Nursery School and Children's Centre | SEND | 21.6 | 16.8 | 16.8 | 16.8 | 0.0 |
| Early Years DSP - St Edmund's Nursery School and Children's Centre | SEND | 10.2 | 19.8 | 19.8 | 19.8 | 0.0 |
| Early Years DSP - Strong Close Nursery School | SEND | 10.2 | 18.0 | 18.0 | 18.0 | 0.0 |
| Early Years DSP - Balance of places still to determine | SEND | | 11.4 | 11.4 | 11.4 | 0.0 |
| ARC - Girlington Primary School | SEND | 15.0 | 20.0 | 20.0 | 20.0 | 0.0 |
| ARC - Swain House Primary School | SEND | 18.0 | 20.0 | 20.0 | 20.0 | 0.0 |
| ARC - Grove House Primary School | SEND | 11.0 | 12.0 | 12.0 | 12.0 | 0.0 |
| ARC - Hanson School | SEND | 42.0 | 48.0 | 48.0 | 48.0 | 0.0 |
| Special - Beechcliffe School | SEND | 121.0 | 144.0 | 144.0 | 144.0 | 0.0 |
| Special - Chellow Heights School | SEND | 243.0 | 243.2 | 243.2 | 243.2 | 0.0 |
| Special - Delius School | SEND | 134.0 | 131.2 | 134.0 | 134.0 | 2.8 |
| Special - Beckfoot Hazelbeck Academy | SEND | 144.0 | 140.0 | 144.0 | 144.0 | 4.0 |
| Special - High Park School | SEND | 127.6 | 130.0 | 130.0 | 130.0 | 0.0 |
| Special - Beckfoot Phoenix Primary Special School | SEND | 96.4 | 97.0 | 97.0 | 97.0 | 0.0 |
| Special - Southfield Academy | SEND | 273.0 | 287.0 | 287.0 | 287.0 | 0.0 |
| Special - Oastler School | SEND | 89.0 | 94.0 | 94.0 | 94.0 | 0.0 |
| Education in Hospital - Airedale | AP | | 7.0 | 7.0 | 7.0 | 0.0 |
| Education in Hospital - BRI | AP | | 16.0 | 16.0 | 16.0 | 0.0 |
| Education in Hospital - Tracks | AP | | 26.0 | 26.0 | 26.0 | 0.0 |
| DSP - Carrwood Primary School | SEND | 5.0 | 4.0 | 12.0 | 12.0 | 8.0 |
| DSP - Denholme Primary School | SEND | 8.0 | 8.0 | 8.0 | 8.0 | 0.0 |
| DSP - Green Lane Primary School | SEND | 16.0 | 24.0 | 24.0 | 24.0 | 0.0 |
| DSP - High Craggs Primary Academy | SEND | 5.0 | 6.0 | 6.0 | 6.0 | 0.0 |
| DSP - Crossflatts Primary School | SEND | 13.0 | 16.0 | 16.0 | 16.0 | 0.0 |
| DSP - Beckfoot Academy | SEND | 4.0 | 10.0 | 10.0 | 10.0 | 0.0 |
| DSP - Oasis Academy (Lister Park) | SEND | 7.0 | 4.0 | 4.0 | 4.0 | 0.0 |
| DSP - Grange Campus | SEND | 11.0 | 12.0 | 12.0 | 12.0 | 0.0 |
| DSP - Parkside School | SEND | 12.0 | 12.0 | 12.0 | 12.0 | 0.0 |
| DSP - The Holy Family Catholic School | SEND | 14.0 | 16.0 | 16.0 | 16.0 | 0.0 |
| DSP - Beckfoot Thornton Academy | SEND | 12.0 | 14.0 | 14.0 | 14.0 | 0.0 |
| DSP - Titus Salt School | SEND | 25.0 | 30.0 | 30.0 | 30.0 | 0.0 |
| DSP - Bradford Academy | SEND | 19.0 | 27.0 | 27.0 | 27.0 | 0.0 |
| DSP - Bradford Forster Academy | SEND | 10.0 | 6.0 | 10.0 | 10.0 | 4.0 |
| DSP - Haworth Primary Academy | SEND | 10.0 | 10.0 | 10.0 | 10.0 | 0.0 |
| DSP - Crossley Hall Primary School | SEND | 4.0 | 12.0 | 12.0 | 12.0 | 0.0 |
| DSP - Long Lee Primary School | SEND | 6.5 | 6.0 | 6.0 | 6.0 | 0.0 |
| DSP - New Primary Provision (location identified) | SEND | | 8.0 | 8.0 | 8.0 | 0.0 |
| DSP - New Primary Provision (location identified) | SEND | | 8.0 | 12.0 | 12.0 | 4.0 |
| DSP - Cottingley Village Primary School | SEND | 7.0 | 10.0 | 10.0 | 10.0 | 0.0 |
| DSP - New Secondary Provision (location identified) | SEND | | 20.0 | 15.0 | 15.0 | -5.0 |
| DSP - New Secondary Provision (location identified) | SEND | | | 12.0 | 12.0 | 12.0 |
| Further Education - Bradford College | SEND | 173.0 | 173.0 | 173.0 | 175.0 | 2.0 |
| Further Education - Shipley College | SEND | 105.0 | 102.0 | 102.0 | 110.0 | 8.0 |
| Further Education - Aspire I | SEND | 85.0 | 85.0 | 85.0 | 85.0 | 0.0 |
| Further Education - Places for new provisions Sept 19 (estimate) | SEND | | | | 60.0 | 60.0 |
| Additional SEND Places in development | SEND | | | 32.0 | 32.0 | 32.0 |
| Totals | | 2,172.5 | 2,522.4 | 2,566.2 | 2,636.2 | 113.8 |
| Totals SEND (including Ellar Carr and Park Primary PRU) | | 2,038.5 | 2,213.4 | 2,257.2 | 2,327.2 | 113.8 |
| Totals AP (not including Ellar Carr or Park Primary PRU) | | 134.0 | 309.0 | 309.0 | 309.0 | 0.0 |

Appendix 3 – Technical Annex

This appendix contains more technical detail on the definitions and calculations of factors that are contained within Bradford Council's high needs funding model. The Funding Ranges Model for Pupil-Led Need is shown separately in Appendix 4.

Notional SEND (Mainstream Schools Block Primary & Secondary)

Local authorities are 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). Our calculation has built up over time. How Bradford currently defines notional SEND (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% |

In addition, 6% of a school's allocation under the Early Years Single Funding Formula, for schools and academies that have nursery provision, is also defined to be available for supporting SEND in early years.

SEND Funding Floor (Mainstream Primary & Secondary)

The SEND Floor provides a 'top up' where the SEND 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. SEND formula funding is defined as the notional SEND in the table above but does not include the 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 values of SEND Floor allocations for individual primary and secondary schools and academies are currently protected at 2017/18 cash levels i.e. schools and academies in 2018/19 received at least the value of allocation they have received in 2017/18.

Setting-Led Needs Factors – Special Schools & Special Academies

- New Services Delegation – an additional amount per pupil to reflect that stand alone special schools cannot access de-delegated and centrally managed services without charge - set at a flat £364 per pupil. So a setting with 100 pupils receives $100 \times £364 = £36,400$ funding.
- Small Setting Protection – an additional sum, for stand-alone settings with fewer than 75 places, to ensure a minimum level of funding for fixed costs. The formula in 2018/19 is:
A (75 x £10,000 x 20%)
B (setting's place funding x 20%)
= top up to the value of A where B is less than A
- Split Sites – an additional agreed sum to replicate existing cash values for schools that continue to operate across split sites (£162,850 full year allocation).
- Post 16 Places – an additional sum per Post 16 place, to continue the additional £1,100 per Post 16 place following the directed reduction from £11,100 to £10,000 place value within the national funding model. This ensures that special schools with post 16 places do not lose out from the technical simplification and retain a higher level of element 1 funding.

- 3% Cash Budget Protection – an additional total cash budget protection, which ensures that at no point during 2018/19 will the total 'Place Plus' calculated budget for an individual special school be more than 3% lower than the 2017/18 total level of funding (taking account of the top-up income received for placements by other local authorities).

Setting-Led Needs Factors – Resourced Units Attached to Mainstream Primary & Secondary Schools and Academies

- New Services Delegation – as special schools above for ARCs only (not applicable for DSPs).
- Small Setting Protection – an additional sum, for DSPs / ARCs with fewer than 24 places, to ensure a minimum level of funding for fixed costs. The formula in 2018/19 is:

A (24 x £10,000 x 20%)

B (setting's place funding (where each place is worth £10,000) x 20%)

= top up to the value of A where B is less than A

- 3% Cash Budget Protection – as special schools above.

Setting-Led Needs Factors – Pupil Referral Units

- Business Rates – applicable for all PRUs – additional funding for business rates at actual cost.
- New Services Delegation – as special schools above for Ellar Carr and Primary PRU only.
- Small Setting Protection – as special schools above for Ellar Carr and Primary PRU only.

HIGH NEEDS PROVISION: FUNDING CATEGORIES, BANDS & AMOUNTS PUPIL-LED NEED 2018/19

| | Range 1 | Range 2 | Range 3 | Range 4 | | | | Range 5 | Range 6 | Range 7 |
|---|-------------------------|---------|---------|--------------------------------|----------------------------|--------------------------------|--------------------------|---------|---------|---------|
| | Delegated Place Funding | | | Band A (16.5-21.5 hours) | Band B (22-27 hours) | Band C (27.5-34.5 hours) | Band D (35+ hours) | | | |
| PRIMARY NEED Additional "Plus" Funding | | | £0 | £952 | £3,000 | £4,597 | £7,161 | £10,440 | £13,910 | £22,857 |
| Mainstream Autism & SLCN | | | | | | SLCN | ASD | | ASD+ | ASD++ |
| Mainstream MLD/SLD/PMLD | | | MLD | | MLD+ | SLD | PMLD | SLD+ | PMLD+ | PMLD++ |
| Mainstream PD | | | | | | | PD | | PD+ | PD++ |
| Mainstream HI/VI | | | | | | HI/VI | | HI+/VI+ | | |
| Mainstream BESD | | | | | | | BESD | | BESD+ | BESD++ |

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

The DfE, in its current operational guidance, states its expectation that the top-up for non-EHCP placements in alternative provisions are managed on a formulaic basis, rather than with reference to the individually identified need of pupils. Currently, there is agreement in place in Bradford that top-up for these placements is calculated at 50% Range 4D and 50% Range 5. This is the rate of funding that is used by the Council in funding top-up relating to the placement in the PRUs and the Primary Behaviour Centres of children and young people permanently excluded.

RESPONSES FORM

Consultation on Funding High Needs Provision 2019/20

Name _____ Setting Name _____

THE DEADLINE FOR RESPONSES TO THIS CONSULTATION IS FRIDAY 30 NOVEMBER 2018

Please send completed questionnaire responses to:

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

Tel: 01274 432678

Fax: 01274 435054

Email: andrew.redding@bradford.gov.uk

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

Question 1: Do you agree with the Council's proposal to continue the existing system for the calculation of high needs funding allocations in 2019/20 on the basis set out in section 4?

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

If not, please provide further explanation here:

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 2019/20 (listed in Appendix 2)?

Question 3: Do you agree with the proposal to continue to use the existing Ranges Model framework (as shown in Appendix 4) as the basis for the calculation of the Pupil-Led Need top-up funding element for the 2019/20 financial year? If not, please explain why not.

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

If not, please provide further explanation here:

Question 4: Do you agree with the proposal to continue to use the existing Setting-Led Need factors as shown in Appendix 3? If not, please explain why not.

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

If not, please provide further explanation here:

Question 5: Do you agree with the proposal to continue to use our existing definition of 'notional SEND' funding identified for individual primary and secondary schools and academies? If not, please explain why not.

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

If not, please provide further explanation here:

Question 6: Do you agree with the proposal to continue to protect in 2019/20 the values of SEN Floor allocations for primary and secondary schools and academies currently in receipt of this funding at their 2017/18 levels? If not, please explain why not.

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

If not, please provide further explanation here:

Question 7: Are there any changes that you would wish to see made to the funding model in 2019/20? Please give details.

Question 8 – Do you have any other comments on the funding model or the proposals that you have not recorded elsewhere?

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SCHOOLS FORUM AGENDA ITEM

For Action



For Information



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

This report asks the Schools Forum to review the position of Central Schools Block, Schools Block and Early Years Block central funds and de-delegated items for 2019/20.

Members representing Maintained Primary Schools are asked to decide on de-delegation in 2019/20 for the purposes of purchasing subscriptions to Fischer Family Trust.

Date (s) of any Previous Discussion at the Forum

A final report on centrally managed funds held across the Schools, Central Schools and Early Years Blocks in 2018/19 was presented to the Forum on 10 January 2018. The Schools Forum considered an additional value for money analysis of the Authority's Trade Union Facilities Time arrangements, which is funded partially via de-delegation from maintained schools within the Schools Block, on 23 May 2018, and from this confirmed continued de-delegation for this purpose in 2018/19.

The Schools Forum, in a separate report to this meeting, is asked to agree the publication of the primary and secondary consultation document, which asks for feedback on the continuation of Schools Block de-delegated funds in 2019/20. This feedback will be considered by the Forum at the next meeting in December.

In making recommendations for 2017/18, secondary phase representatives agreed 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. Members are reminded that the de-delegated fund for Minority Ethnic School Support ceased on 1 May 2016 and the DSG's Contribution to School Improvement (our 'historic commitment') ceased at 1 September 2017. De-delegation from the primary phase for behaviour support ceased at 1 September 2018.

Background / Context

Forum Members are reminded that a new Central Schools (Services) Block was established within the DSG framework at 1 April 2018. Some centrally managed funds, previously held within the Schools Block, have now been transferred into this new Block. As such, these funds should no longer be seen as 'top-slices' from primary and secondary formula funding. They are allocations via a national DSG formula to support statutory functions all authorities hold for all schools and academies. Forum Members are also reminded that the restrictions on funds for Schools Forum costs and School Admissions, which limited the value of these funds to that held in the previous year, have now been removed. The table below summarises the centrally managed funds that were agreed to be funded from the 2018/19 DSG allocation (excluding monies allocated from brought forward balances and funds held initially and delegated during the year e.g. EYPP).

| Fund | Schools Block | Central Schools Block | Early Years Block | Total |
|-------------------------------------|-------------------|-----------------------|-------------------|-------------------|
| Copyright Licences | n/a | £356,631 | £34,374 | £391,005 |
| Growth Fund | £1,790,161 | n/a | n/a | £1,790,161 |
| Schools Forum costs | n/a | £10,000 | n/a | £10,000 |
| School Admissions | n/a | £580,100 | n/a | £580,100 |
| Statutory Duties (former ESG) | n/a | £1,331,086 | n/a | £1,331,086 |
| Activities transferred from the HNB | n/a | £574,880 | n/a | £574,880 |
| DD - School Behaviour Support Team | £128,022 | n/a | n/a | £128,022 |
| DD - FSM Eligibility Assessments | £68,956 | n/a | n/a | £68,956 |
| DD - Fischer Family Trust | £21,600 | n/a | n/a | £21,600 |
| DD - School Maternity / Paternity | £1,461,135 | n/a | £168,534 | £1,629,669 |
| DD - Trade Union Facilities Time | £192,812 | n/a | £17,765 | £210,577 |
| DD - Trade Union Health and Safety | £29,464 | n/a | £2,715 | £32,179 |
| DD - Public Duties & Suspensions | £31,380 | n/a | £3,620 | £35,000 |
| DD - Re-Org: Safeguarded salaries | £49,324 | n/a | n/a | £49,324 |
| DD - Re-Org: Deficit Budgets | £132,234 | n/a | n/a | £132,234 |
| DD - Exceptional Costs & SIFD | £88,000 | n/a | n/a | £88,000 |
| Totals | £3,993,088 | £2,852,697 | £227,008 | £7,072,793 |

Background / Context (continued)

The table below summarises the amounts per pupil contributions from maintained schools to the funds marked as 'de-delegated' ('DD') in the previous table.

| 2018/19 De-delegated Funds | Early Years £app | Primary £app | Secondary £app |
|---|-----------------------------|-------------------------|---------------------------|
| School Behaviour Support Team | n/a | £3.79 | n/a |
| Fischer Family Trust | n/a | £0.64 | n/a |
| School Maternity / Paternity | £43.28 | £43.28 | n/a |
| Trade Union Facilities Time | £4.56 | £4.56 | £4.56 |
| Trade Union Health and Safety | £0.70 | £0.70 | £0.70 |
| Public Duties & Suspensions | £0.93 | £0.93 | n/a |
| Re-Org: Safeguarded salaries | n/a | £1.37 | £0.36 |
| Re-Org: Deficit Budgets | n/a | £3.92 | n/a |
| Exceptional Costs & SIFD | n/a | £2.61 | n/a |
| Total £app maintained schools | £49.47 | £61.80 | £5.62 |
| FSM Eligibility Assessments (Per FSM Ever 6) | n/a | £5.80 | £5.14 |

Regarding the future of de-delegation, we now understand that there is no intention to change current Schools Block de-delegation arrangements in the medium term. There had been a suggestion that de-delegation as a way of financing certain services for maintained schools would not be permitted after 2019/20. Appendix 1 provides an updated summary of the position of our funds against other local authorities in 2018/19. This shows our comparative spending per pupil as well as the percentage of local authorities that de-delegated within the Schools Block for permitted purposes.

Details of the Item for Consideration

The information in this report is presented to initiate the School Forum's annual review of centrally managed and de-delegated funds held within the Central Schools Block, Schools Block and Early Years Block. The Forum will be required to make its final recommendations on 2019/20 funds on 9 January 2019. In particular then, Forum Members are asked to consider what further information is needed and what review work should take place in order to enable final recommendations for 2019/20 to be made.

A further report will be presented to the Forum in December. Additional reports will also cover specific consideration of a proposal to transfer some of the costs of centrally managed support services for early years aged children with high needs from the High Needs Block to the Early Years Block. The primary and secondary consultation document picks up proposals related to the Growth Fund in 2019/20, which will again be further considered by the Forum in December.

However, owing to timescales set by Fischer Family Trust, it is necessary to ask Members representing Maintained Primary Schools to decide at this meeting on de-delegation in 2019/20 for the purposes of purchasing subscriptions to Fischer Family Trust.

General Parameters and Expectations 2019/20

Copyright licences costs for all state funded schools and academies must be managed centrally within the DSG as this is a 'national' top-slice. It is reasonable to apportion this cost across the Blocks.

It is expected that:

- The Forum will not wish to revisit decisions made in previous years to cease central funds.
- As the Forum reviewed in some detail in May 2018 the Authority's Trade Unions Facilities Time arrangements, these will continue in 2019/20 on the basis agreed.
- The Schools Forum will agree to the continuation of the pass back to the Authority of the statutory retained duties former ESG funding that was transferred into the DSG at 1 April 2017 (£1.331m) and the DSG's funding of School Admissions (0.580m), both from the Central Schools Block.
- The Schools Forum will agree to continue the small budget for Schools Forum costs (£10,000) from the Central Schools Block.
- The Schools Forum will continue to prioritise any headroom available within the Central Schools Block to support High Needs Block pressures.
- The value of the 2019/20 Growth Fund will be sufficient to cover anticipated new costs.
- Remaining costs of safeguarded salaries incurred by the re-organisation of maintained schools will continue to be funded via de-delegation on an actual cost basis.
- The Forum will continue to support retaining a de-delegated fund to meet any costs of deficit balances held by maintained primary schools that convert to academy status under sponsored arrangements.

Details of the Item for Consideration (continued)

- That the total surplus carry forward balance of de-delegated funds will continue to be ring-fenced and will be deployed in support of managing the costs of these funds as well as reducing the on-going (new year) contribution taken from maintained schools where this is possible. A total balance of £0.699m was brought forward from 2017/18. The forecasted total balance to be held at the end of 2018/19 will be presented to the Forum in December.

The remainder of this report focuses on consideration of the position of some specific de-delegated funds and on the allocation of headroom that is forecasted to be present within Central Schools Block in 2019/20.

Central Schools Block Estimated Headroom 2019/20

The table below lists the commitments that are already present within the Central Schools Block and are expected to continue in 2019/20:

| Commitment | Value |
|---|-------------------|
| Copyright Licences (2018/19 + an estimated 5%) | £374,462 |
| Schools Forum costs (as 2018/19) | £10,000 |
| School Admissions (as 2018/19) | £580,100 |
| Statutory Duties (former ESG) (as 2018/19) | £1,331,086 |
| Activities transferred from the HNB | £389,000 |
| Total Central Schools Block Committed in 2019/20 | £2,684,648 |

On indicative numbers, it is estimated that there is £0.24m of headroom (unallocated budget) within the Central Schools Block in 2019/20. We would propose to the Schools Forum that this headroom is transferred as budget to the High Needs Block, in support of the financial pressures within this Block. We would retain the funds within the Central Schools Block on a cash flat basis in order to maximise the amount of headroom that can be transferred, with the exception of copyright licences, where this will need to meet the actual cost to be confirmed by the DfE in December.

De-Delegated Funds - Introduction

Members are reminded that we have asked maintained schools for views on the continuation of de-delegation within the consultation paper, which is to be agreed at this meeting. The deadline for responses to the primary and secondary consultation document is 30 November and will be considered at the December meeting.

Members are also reminded that the Schools Forum has previously established the principle that the values of contributions per pupil to some de-delegated funds will not exceed the value in the previous year to compensate for the loss in budget brought by further conversions of maintained schools to academy status i.e. all things being the same, as schools convert to academies, the cash values of these de-delegated funds will reduce, with any gap in funding as a result of this reduction being recovered through trading services. This principle affects the following funds, de-delegated from nursery and primary & secondary phases: Trade Union Facilities Time, Trade Union Health and Safety Rep Time and FSM Eligibility Assessments.

De-delegation is a mechanism through which contributions can be easily collected from maintained schools for valued centrally managed funds and services. The cessation of de-delegation would not in itself prevent the existence of centrally managed services, with the exception of the maternity / paternity 'insurance' scheme. Where buy in by academies remains strong, and would be strong from maintained schools, central services could continue on traded services model without de-delegation.

We have previously highlighted to the Schools Forum that the rate of conversion of maintained schools in Bradford to academy status may be such that consideration may need to be given at an appropriate point to whether de-delegation remains effective and efficient. The Authority would generally expect, and recommend, the Forum to continue de-delegation in 2019/20 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. For the 2019/20 financial year, de-delegation cannot be applied to a school that has converted to academy before 2 April 2019. In addition, de-delegation must cease, from 1 September 2019, for any school that converts between 2 April and 1 September 2019. So, there is a year on year impact as well as an in year impact on the values that can be taken out of maintained school budgets to fund de-delegated items. This means that the managers of these funds must trade services with newly converted academies or must reduce their cost bases in order to avoid overspending. Managers must be quick in responding to this during the year.

De-Delegation: 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 2018/19 per FSM values, with contributions continuing to be taken using FSM Ever 6 data.

Details of the Item for Consideration (continued)

De-Delegation: Trade Unions Facilities Time

As the Forum reviewed in some detail in May 2018 the Authority's Trade Unions Facilities Time arrangements, the Local Authority recommends that de-delegation is continued from all phases at the same per pupil contribution value as in 2018/19.

De-Delegation: Fischer Family Trust

De-delegation was continued for FFT subscription for the primary phase in 2018/18 because of the significant saving that collective purchase delivers. Although the secondary phase has now ceased de-delegation, all secondary schools and academies, as well as primary academies, have previously invited to buy into the Authority-led FFT arrangements and many have.

Owing to timescales set by Fischer Family Trust, it is necessary to ask Members representing Maintained Primary Schools to decide at this meeting on de-delegation in 2019/20 for the purposes of purchasing subscriptions to Fischer Family Trust.

Maintained primary schools were charged £0.64 per pupil in 2018/19. The charge for 2019/20 is £0.76 per pupil, which incorporates the 19% increase in charge levied by FFT. Despite this increase, by purchasing collectively through the Local Authority schools will save £35,632 on the cost of purchasing directly with FFT.

De-Delegation: Maternity / Paternity 'Insurance' Scheme & Suspensions / Public Duties

The Local Authority recommends that the de-delegated funds for maternity / paternity insurance and suspensions / public duties are continued for nursery and primary in 2019/20, with contributions set at a value to meet anticipated costs. Further work is taking place, but it is currently estimated that the cost of the maternity / paternity insurance scheme will be in the region of £19.70 per pupil, which includes the release of £0.5m of expected carry forward under-spending generated in 2018/19. This means that there is a significant 'one off' saving in the cost of contribution in 2019/20.

Colleagues in maintained primary schools will be aware of the warnings that have been given previously about the viability of current arrangements for supporting maternity / paternity costs. We have warned, as happened in the secondary sector, that we may be moving towards the position where existing arrangements are no longer financially efficient or viable. This is due to the growth in cost at the same time as a reducing number of maintained schools. It is recommended that the maternity / paternity scheme should remain in place in 2019/20 especially because of the brought forward balance, which can be allocated to support costs. However, the continuation of this from April 2020 will need to be reviewed. Schools must be given adequate warning where a decision is taken to cease this fund.

De-Delegation: Exceptional Circumstances, SIFD and Academy conversion deficit budgets)

A de-delegated fund of £88,000 was continued in 2018/19 for maintained primary schools facing exceptional circumstances to access according to criteria agreed with the Schools Forum. There have been no allocations from this budget to date this year. The Authority however, would recommend that a budget for exceptional circumstances is continued to be held for the primary phase in 2019/20.

Members are reminded that primary maintained members established in 2017/18 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. A further £132,200 was de-delegated at the start of 2018/19.

The first allocation against this fund is expected to be made during 2018/19 and this will be presented to the Schools Forum in due course. The Local Authority recommends that a de-delegated fund is continued to meet any costs of deficit balances held by maintained primary schools that convert to academy status under sponsored arrangements. The Forum will be asked to further consider this in its decision making in January.

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

Recommendations will have direct implications for the distribution of the Central Schools Block, Schools Block and Early Years Block.

Recommendations

- (1) The Forum is asked to review the position of Central Schools Block, Schools Block and Early Years Block central funds and de-delegated items, to indicate what further consideration should be given / review work should take place, in advance of making final recommendations for 2019/20 at the January 2019 meeting.
- (2) Members representing Maintained Primary Schools are asked to decide on de-delegation in 2019/20 for the purposes of purchasing subscriptions to Fischer Family Trust.

List of Supporting Appendices / Papers (where applicable)

Appendix 1 – Benchmarking of 2018/19 Funds

Contact Officer (name, telephone number and email address)

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2018/19 Schools Block De-Delegated Funds & Central Services Block Funds S251 Budget Benchmarking

based on 2018/19 S251 database published 09.10.18; excluding Bradford's allocation of one off monies

Bradford Ongoing DSG Budget Comparison

Per Pupil Spend 2018/19

negative = Bfd is lower

| Type | Bradford 2018/19 Ongoing DSG Budget | Bradford (Rounded figure) | England National Median * | Statistical Neighbours Median | Met Districts Median | Yorks & Humberside Median | Bfd Cash Difference to National | Bfd Cash Difference to Stat Neigh | Bfd Cash Difference to Met Dist | Bfd Cash Difference to Y&H | Comments |
|--|-------------------------------------|---------------------------|---------------------------|-------------------------------|----------------------|---------------------------|---------------------------------|-----------------------------------|---------------------------------|----------------------------|--|
| 1.1.1 Contingencies | 269,558 | 6 | 5 | 4 | 6 | 9 | 47,425 | 94,850 | 0 | -142,275 | |
| 1.1.2 Behaviour Support Services | 128,022 | 3 | 0 | 0 | 0 | 0 | 142,275 | 142,275 | 142,275 | 142,275 | We ceased de-delegation at 1 Sept 2018 |
| 1.1.3 Support for UPEG and Bilingual Learners | 0 | 0 | 0 | 0 | 2 | 0 | 0 | 0 | -94,850 | 0 | De-delegation ceased 2016-17 |
| 1.1.4 FSM Eligibility Assessment | 68,956 | 1 | 0 | 1 | 1 | 1 | 68,956 | 21,531 | 21,531 | 21,531 | |
| 1.1.5 Insurance | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | We have never de-delegated |
| 1.1.6 Museums / Libraries | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | We have never de-delegated |
| 1.1.7 Licences / Subscriptions | 21,600 | 0 | 0 | 0 | 0 | 0 | 21,600 | 21,600 | 21,600 | 21,600 | FFT Subscription |
| 1.1.8 Staff Costs Supply Cover - excluding Facilities Time | 1,492,515 | 31 | 0 | 15 | 3 | 3 | 1,470,175 | 758,800 | 1,327,900 | 1,327,900 | Maternity Scheme (Primary only) |
| 1.1.9 Staff Costs - Supply Cover for Facilities Time | 222,276 | 5 | 2 | 4 | 4 | 3 | 142,275 | 47,425 | 47,425 | 94,850 | |
| 1.1.10 School Improvement | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Total De-Delegated Items (Maintained Schools) | 2,202,926 | 46 | 26 | 38 | 38 | 39 | 948,500 | 379,400 | 379,400 | 331,975 | |
| 1.4.10 Growth Fund (primary & secondary) | 1,790,161 | 18 | 14 | 8 | 10 | 11 | 408,848 | 1,022,120 | 817,696 | 715,484 | |
| 1.4.1 Contribution to Combined Budgets (all phases) | 0 | 0 | 7 | 1 | 7 | 4 | -715,484 | -102,212 | -715,484 | -408,848 | We ceased at September 2017 |
| 1.4.2 Admissions (all phases) | 580,100 | 6 | 8 | 7 | 6 | 7 | -204,424 | -102,212 | 0 | -102,212 | |
| 1.4.3 Servicing of Schools Forums (all phases) | 10,000 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | -102,212 | 0 | |
| 1.5.1 - 1.5.3 Statutory Functions transferred ESG (all phases) | 1,331,086 | 13 | 13 | 12 | 14 | 13 | 0 | 102,212 | -102,212 | 0 | |

Further Info on De-Delegated Funds

No. of Authorities that De-Delegate

% of Authorities that De-Delegate

| Type | England National * | Statistical Neighbours | Met Districts | Yorks & Humberside | England National | Statistical Neighbours | Met Districts | Yorks & Humberside |
|--|--------------------|------------------------|---------------|--------------------|------------------|------------------------|---------------|--------------------|
| 1.1.1 Contingencies | 100 | 6 | 24 | 11 | 67% | 55% | 67% | 73% |
| 1.1.2 Behaviour Support Services | 63 | 3 | 16 | 7 | 42% | 27% | 44% | 47% |
| 1.1.3 Support for UPEG and Bilingual Learners | 62 | 5 | 19 | 7 | 41% | 45% | 53% | 47% |
| 1.1.4 FSM Eligibility Assessment | 77 | 8 | 21 | 9 | 51% | 73% | 58% | 60% |
| 1.1.5 Insurance | 20 | 5 | 6 | 2 | 13% | 45% | 17% | 13% |
| 1.1.6 Museums / Libraries | 12 | 3 | 5 | 4 | 8% | 27% | 14% | 27% |
| 1.1.7 Licences / Subscriptions | 45 | 1 | 8 | 2 | 30% | 9% | 22% | 13% |
| 1.1.8 Staff Costs Supply Cover - excluding Facilities Time | 67 | 8 | 19 | 8 | 45% | 73% | 53% | 53% |
| 1.1.9 Staff Costs - Supply Cover for Facilities Time | 109 | 10 | 32 | 11 | 73% | 91% | 89% | 73% |
| 1.1.10 School Improvement | 27 | 1 | 10 | 4 | 18% | 9% | 28% | 27% |
| | | | | | (out of 150) | (out of 11) | (out of 36) | (out of 15) |

* excludes City of London and Isles of Scilly

 = more than 50% of authorities de-delegate

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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)

The Schools Forum is asked to consider the outcomes of consultation that has been completed on the amendment to the Council's Financial Regulations for Maintained Schools and School Contract Standing Orders, and the subsequent amendments to the Scheme for Financing Schools.

Date (s) of any Previous Discussion at the Forum

This consultation was presented to the Schools Forum on 11 July 2018.

Background / Context

The Schools Finance Regulations permit the Local Authority to amend the provisions within the Scheme, subject to the approval of the Schools Forum. Provision 1.4 within the current Scheme states that, "Any proposed revisions to the Scheme will be the subject of consultation with schools maintained by the Local Authority, before the proposed revisions are submitted to the Schools Forum for their approval." Where the Schools Forum does not approve the Local Authority's proposals for amendment, the Local Authority has the right of appeal to the Secretary of State, who will make a final judgement.

The Schools Forum approved consulting with maintained schools on the proposed changes to the Scheme at its meeting on 11 July 2018.

The outcomes of this consultation are now presented. Subject to the Forum's approval of the final amended documents, the FRfMS and SCSOs will be presented to the Authority's Governance and Audit Committee for final decision / approval. The Authority intends to implement agreed amendments as soon as possible following the completion of the decision making processes.

As the consultation document set out, the amendments to the 3 documents have been put forward with the aims of:

- Ensuring that our provisions remain accurate and refer correctly to legislation and officer posts / committee structures within the Authority.
- Incorporating recent changes in requirements, including changes in legislation, since the provisions were last updated.
- Responding to feedback from the Authority's Internal Audit Team on areas of weakness found in school's financial accounting and also where our current provisions would benefit from greater clarity or amendment.
- More clearly setting out for schools their responsibilities in the procurement of contracts, goods and services.
- More clearly signposting for schools the Authority's working protocols and additional guidance.
- Expressing more clearly (but not materially altering) existing requirements placed on schools in areas where the Authority holds concern about compliance, and
- Establishing new or firmer provisions (and materially altering requirements placed on schools) in areas where the Authority holds concern about compliance.

Appendix 1 repeats for reference the summary of the substantive changes proposed within all 3 documents.

Appendix 2 is the final proposed Scheme for Financing Schools.

Details of the Item for Consideration

The consultation ran from 11 July to 12 October 2018.

The consultation simply asked whether the amendments to 3 documents are agreed, if not agreed for an explanation of which amendments and why not, and for any other additional comments.

An analysis of responses will be presented to the meeting.

In response to the feedback we have received so far (at 10 October) we propose to take forward the amendments as set out in the consultation, adjusted as follows:

- All references to the governing *body* or *bodies* have been amended to governor *boards* in line with the terminology now used by the DfE within its guidance.
- Annex 1 within the Scheme (list of schools covered by the Scheme) has been updated to take account of the conversion of maintained schools up to 1 September 2018.
- The definitions of quotations and tenders within the Schools Contract Standing Orders have been clarified.
- Within the Scheme, provision 2.14 now includes a link to further guidance provided for schools by facilities management. It also include clarification on notification requirements.

With the inclusion of these adjustments, the Authority now asks the Schools Forum to approve the final Scheme for Financing Schools, attached at Appendix 2, and to recommend to the Governance and Audit Committee that the amendments to the Financial Regulations for Maintained Schools and the Schools Contract Standing Orders are approved.

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

None

Recommendations

The Schools Forum is asked to agree the proposed amendments to the Scheme for Financing Schools and to recommend to the Authority's Governance and Audit Committee that the amendments to the Scheme, the Financial Regulations for Maintained Schools and School Contract Standing Orders are implemented.

List of Supporting Appendices / Papers (where applicable)

Appendix 1 – Summary of the proposed amendments to the 3 documents
Appendix 2 – Final proposed Scheme for Financing Schools

Contact Officer (name, telephone number and email address)

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Document JO Appendix 2

SCHEME
FOR
FINANCING SCHOOLS
FINAL DRAFT POST CONSULTATION

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ANNEX A List of schools maintained by the Local Authority

ANNEX B Responsibilities for repairs & maintenance

SECTION 1

1.1 The Funding Framework

The funding framework is based on the legislative provisions in sections 45-51 of the School Standards and Framework (SSAF) Act 1998.

Under this legislation, local authorities determine for themselves the size of their Schools Budget and their Non-Schools Education Budget – although at a minimum a local authority must appropriate its entire Dedicated Schools Grant to their Schools Budget. The categories of expenditure which fall within the two budgets are prescribed under regulations made by the Secretary of State, but included within the two, taken together, is all expenditure, direct and indirect, on an authority's maintained schools, except for capital and certain miscellaneous items. Local authorities may deduct funds from their schools budget for purposes specified in regulations made by the Secretary of State under s.45A of the Act (the centrally retained expenditure). The amounts to be deducted for these purposes are decided by the authority concerned, subject to any limits or conditions (including gaining the approval of their School Forum or the Secretary of State in certain instances) as prescribed by the Secretary of State. The balance of the schools budget left after deduction of the centrally retained expenditure is termed the Individual Schools Budget (ISB). Expenditure items in the non-schools education budget must be retained centrally (although earmarked allocations may be made to schools).

Local authorities must distribute the ISB amongst its maintained schools using a formula which accords with regulations made by the Secretary of State, and enables the calculation of a budget share for each maintained school. This budget share is then delegated to the governing board of the school concerned, unless the school is a new school which has not yet received a delegated budget, or the right to a delegated budget has been suspended in accordance with s.51 of the Act. The financial controls within which delegation works are set out in this Scheme made by the Authority in accordance with s.48 of the Act and regulations made under that section. All proposals to revise the Scheme must be approved by the Schools Forum, though the authority may apply to the Secretary of State for approval in the event of the Forum rejecting a proposal or approving it subject to modifications that are not acceptable to the authority.

Subject to any provision made by or under the Scheme, governing boards of schools may spend such amounts of their budget shares as they think fit for any purposes of their school* and for any additional purposes prescribed by the Secretary of State in regulations made under S.50 of the Act. (* Section 50 has been amended to provide that amounts spent by a governing board on providing community facilities or services under section 27 of the Education Act 2002 are treated as if they were amounts spent for the purposes of the school (s50(3A) of the Act.)

Funds devolved and delegated (whether under Section 50 or otherwise) to the School's Governing Board by the Local Authority remain the property of the Local Authority until spent by the Governing Board or the Headteacher; and when spent by the Governing Board or the Headteacher shall be taken to be spent by them as the Authority's agent.

An authority may suspend a school's right to a delegated budget if the provisions of the school financing scheme (or rules applied by the Scheme) have been substantially or persistently breached, or if the budget share has not been managed satisfactorily. A school's right to a delegated budget share may also be suspended for other reasons (schedule.17 of the Act).

The Secretary of State may direct a local authority to provide information about its planned and actual expenditure in connection with its education funds. The detailed publication requirements for financial statements are set out in directions issued by the Secretary of State. Each year the Authority publishes a statement setting out details of its planned Schools Budget and other expenditure on children's services, showing the amounts to be centrally retained and funding delegated to schools. The Authority also publishes a statement showing out-turn expenditure at

both central level and for each school, and the balances held in respect of each school.

Regulations require a local authority to publish their Scheme and any revisions to it on a website accessible to the general public, by the date that any revisions come into force, together with a statement that the revised Scheme comes into force on that date.

Section 48 (3) of the SSFA 1998 provides that where there is any inconsistency between the Scheme maintained by the Local Authority and any other rules or regulations made by the Authority, which relate to the funding or financial management of schools they maintain, the terms of the Scheme shall prevail.

1.2 The role of the Scheme

The Scheme provides for the delegation of financial and managerial responsibility to Governing Boards of schools and describes the regulations and conditions to which Governing Boards should adhere, in order to remain accountable to the public and the Authority.

The Scheme is based on the following principles:-

- (i) That responsibilities should be aligned with funding, so that both schools and the Local Authority are held to account for their performance in spending public money,
- (ii) That the optimum level of delegation of financial and managerial responsibilities to Governing Boards should be achieved,
- (iii) That Governing Boards should be allowed the maximum amount of freedom in determining the financial and managerial policies for their schools consistent within the framework of this Scheme, the Financial Regulations for Maintained Schools, the Guide to Financial Procedures in Schools, and Schools Contract Standing Orders,
- (iv) That the process for allocating resources to schools should be transparent and aim for an equitable distribution related to the needs of pupils,
- (v) That the Scheme should aim to enhance the teaching and learning process in each school, in order to meet the needs of the pupils.

The Scheme in places refers to separate documents, which set out in more detail certain aspects of financial responsibilities and good practice guidance.

The Financial Regulations for Maintained Schools, Schools Contract Standing Orders, and Guide to Financial Procedures can be access [here](#).

The Local Authority's Surplus Balances Protocol and Deficit Budget Protocol can be found [here](#).

1.2.1 Application of the Scheme to the Authority and maintained schools

The Scheme applies in respect of all community, nursery, voluntary, foundation (including trust), community or foundation special schools and pupil referral units (PRUs) maintained by the Authority. The schools covered by this Scheme are listed in Annex A.

1.3 Publication of the Scheme

A copy of the Scheme is available on our [public website](#)

1.4 Revision of the Scheme

Any proposed revisions to the Scheme will be the subject of consultation with schools, the Headteacher and the Governing Board of each school, maintained by the Local Authority, before the proposed revisions are submitted to the Schools Forum for their approval. All proposed revisions must be submitted to the Schools Forum for approval by members of Forum representing maintained schools.

Approved revisions will be notified to the Headteacher and Governing Board of each school.

1.5 Delegation of powers to the Headteacher

The Governing Board should consider the extent to which it wishes to delegate its financial powers to the Headteacher. Where such delegation is agreed, the decision (and any revisions) should be recorded in the minutes of the Governing Board.

The responsibilities of the Headteacher and Governing Board in respect of the annual budget plan are that the first formal budget plan of each financial year, must be approved by the governing board, or by a committee of the governing board.

1.6 Maintenance of schools

The Local Authority is responsible for maintaining the schools covered by the Scheme, and this includes the duty of defraying all the expenses of maintaining them (except in the case of a voluntary school where some of the expenses are, by statute, payable by the Governing Board). Part of the way the Authority maintains schools is through the funding system put in place under sections 45 to 51 of the School Standards and Framework Act 1998.

SECTION 2: FINANCIAL REQUIREMENTS

2.1.1 Application of financial controls to schools

All schools are required to abide in the management of their delegated budgets by the Authority's requirements on financial controls and monitoring, not only those in this Scheme but also those requirements which are contained in the Financial Regulations for Maintained Schools, the Guide to Financial Procedures in Schools **and Schools Contract Standing Orders**.

2.1.2 Provision of financial information and reports

Schools are required to provide to the Director of Children's Services or his/her nominee, quarterly monitoring reports and bank account reports, in formats determined by the Local Authority and in accordance with the following timetable:

Quarter One

- Budget monitor report with projected year end out-turn forecast
 - Bank account receipts and payments for the period April - June with bank account reconciliation as at 30 June
- by 31 July

Quarter Two

- Budget monitor report with projected year end out-turn forecast
 - Bank account receipts and payments for the period July - September with bank account reconciliation as at 30 September
- by 31 October

Quarter Three

- Budget monitor report with projected year end out-turn forecast
 - Bank account receipts and payments for the period October - December with bank account reconciliation as at 31 December
- by 31 January

Quarter Four

- Budget out-turn report with actual income and expenditure (ie including accruals)
 - Bank account income and expenditure for the period January - March with bank account reconciliation as at 31st March
- by 30 April *
- (* date set annually in the Authority's year end closure guidance)

VAT returns

Monthly

However, the above timetable can vary if the Authority notifies the schools in writing, that in its view the school's financial position requires more frequent submission e.g. the school is in its first year of operation or the school is due to close.

The restriction to a minimum 3 month interval does not apply to schools which are part of an on-line financial accounting system operated by the Local Authority.

2.1.3 Payment of salaries; payment of bills

The Governing Board is responsible for ensuring that secure and efficient systems are in place to administer the systems for payment of invoices and making payments to staff, in accordance with the requirements and guidance given in Financial Regulations for Maintained Schools, the Guide to Financial Procedures in Schools **and Schools Contract Standing Orders**. Payments to workers must comply with IR35 Regulations.

2.1.4 Control of assets

The governing board must ensure that an inventory of all assets, including plant, equipment, computer hardware and furniture, is kept in accordance with the requirements of Financial Regulations for Maintained Schools and the guidance included within the Guide to Financial Procedure in Schools. However, the Governing Board is free to determine their own arrangements for keeping an inventory for items below £1,000. A register must be kept in some form.

2.1.5 Accounting Policies (including year-end procedures)

The Chief Financial Officer is responsible for approving and controlling Council-wide accounting and financial systems. Schools must abide by the procedures issued by him/her as regards all accounting policies and procedures, including the in-year maintenance of accounts and the preparation of year-end accounts.

2.1.6 Writing off of debts

The Governing Board may write-off debts up to the value limit defined in the Financial Regulations for Maintained Schools and in accordance with the procedures set out in the Guide to Financial Procedures in Schools. The value limit is currently £500 and is subject to periodic review.

Debts over £500 may only be written off by the Council's Chief Financial Officer when evidence is provided that the school's debt recovery procedures have been followed and the debt is deemed to be irrecoverable by the Council's Chief Financial Officer.

2.2 Basis of accounting

All financial reports furnished by the Governing Board to the Local Authority must be on an accruals basis.

2.3 Submission of budget plans

Schools must submit to the Local Authority, an annual budget approved by the Governing Board by 15 May each year. The desirable format for the submission of the budget plan should, as far as possible, take account of the Consistent Financial Reporting framework. Schools must also submit draft "3 year" budgets detailing their provisional budget plan for the following 2 financial years, in a format prescribed by the Local Authority, by 30 June. Schools are required to take full account of estimated deficits and surpluses, at the previous 31 March, in this budget plan.

The Local Authority will provide to schools all the income and expenditure data it holds which is necessary to facilitate efficient planning by schools, and supply schools with an annual statement showing when this information will be available at times through the year.

2.3.1 Submission of Financial Forecasts

The Authority may require schools to submit a financial forecast covering each year of a multi-year period.

2.4 Efficiency and Value for Money

Schools must seek to achieve efficiencies and value for money, to optimise the use of their resources and to invest in teaching and learning, taking into account the Authority's purchasing, tendering and contracting requirements detailed in **Schools Contract Standing Orders**.

It is for heads and governors to determine at school level how to secure better value for money.

2.5 Virement

Schools may vire freely between budget headings in the expenditure of their budget shares. Where a school has opted for its budget share to be paid into the school bank account net of staffing costs, then it must notify the Director of Children's Services of virements between staffing and non-staffing vote headings, to ensure that correct instalments are advanced into its bank account.

2.6 Audit: General

All funds delegated to schools by the Local Authority under this Scheme, and including any other Authority or associated funds generated by the school in support of the general provision of education, are subject to the internal audit arrangements of the Authority.

Similarly, the Authority's external auditors will also be responsible for certification of school accounts and financial arrangements as part of the Authority's annual statutory accounts audit. Additionally, the external auditor may from time to time be required to undertake other audit work involving access to schools.

Schools are required to co-operate with any reasonable and legitimate request for access to records or information made by the Authority's internal and external auditors.

2.7 Separate external audits

A Governing Board may spend funds from its budget share to obtain external audit certification of its school accounts.

Such an external audit will be additional to, and separate from, the requirements of the Local Authority's internal and external audit arrangements and will not be a substitute for these.

The Local Authority will be entitled to request from the Governing Board a copy of any separate external audit certificate and/or report issued.

2.8 Audit of voluntary and private funds

A Governing Board must provide audit certificates in respect of voluntary and private funds which it holds and of the accounts of any trading organisation controlled by the school, in accordance with the procedures detailed in the Guide to Financial Procedures for Schools.

2.9 Register of business interests

The Governing Board of each school must establish a register, which lists for each member of the Governing Board and the Headteacher:

- (i) Any business interests they or any members of their immediate family have;
- (ii) Details of any other educational establishments that they govern;
- (iii) Any relationships between school staff and members of the governing board

The Governing Board must:

- (i) Ensure that the register is kept up to date with notification of changes and through annual review of entries
- (ii) Make the register available for inspection by governors, staff and parents, and the authority

- (iii) Publish the register, for example, on a publicly accessible website.

2.10 Purchasing, tendering and contracting requirements

Governing Boards must abide by the Schools Contract Standing Orders in all purchasing, tendering and contracting matters.

2.11 Application of contracts to schools

Governing Boards have the right to opt out of contracts arranged by the Authority provided that notice is given in accordance with the contract terms and, where no notice period is set out, no less than 3 months notice should be given.

Although governing boards are empowered under paragraph 3 of schedule 1 of the Education Act 2002 to enter into contracts, in most cases they do so on behalf of the Local Authority as maintainer of the school and the owner of the funds in the budget share. Other contracts may be made solely on behalf of the governing board, when the governing board has clear statutory obligations – for example, contracts made by aided or foundation schools for the employment of staff.

2.12 Central funds and earmarking

The Local Authority may, under appropriate circumstances, make sums available to schools from central funds, in the form of allocations which are additional to, and separate from, the schools' budget shares. These allocations will be subject to conditions setting out the purpose or purposes for which the funds may be used. Whilst schools may be allowed to vire such funds (except, of course, where the funding is supported by a specific grant which the Local Authority itself is not permitted to vire), virement will not be made to the point of assimilating these allocations into the schools budget share.

It is a requirement that such earmarked funding from centrally retained funds is spent only on the purposes for which it is given, or on other budget heads for which earmarked funding is given, and is not vired into the schools budget share. The Governing Board of each school will maintain an accounting mechanism in order to demonstrate that this requirement has been complied with.

Where a school does not fully spend earmarked funds in-year, or within the prescribed period, the Local Authority will ask for the unspent balance to be refunded.

The Local Authority will not make any deduction, in respect of interest costs to the Local Authority, from payments to schools of devolved specific or special grant.

2.13 Spending for the purposes of the school

By virtue of section 50(3A), which came into force on 1 April 2011, but subject to regulations made by the Secretary of State and any provisions of the Scheme, amounts spent by governing boards on community facilities or services under section 27 of the Education Act 2002 will be treated as if spent for any purposes of the school.

2.14 Capital spending from budget shares

Governing Boards may use their budget shares to meet the cost of capital expenditure on the school premises. This includes expenditure by the Governing Board of a voluntary aided school on work which is their responsibility under paragraph 3 of Schedule 3 of the SSAF Act 1998.

The Council's definition of capital expenditure is where the total expenditure for a single project or Scheme is at least £10,000. Anything below £10,000 is defined as revenue expenditure.

If the expected capital expenditure from the budget share in any one year will exceed £15,000, the Governing Board must notify the Local Authority and the Governing Board must take into account any advice from the Director of Children's Services as to the merits of the proposed expenditure.

Governing Boards must assess in advance, where relevant, the health and safety competence of contractors, taking account of Local Authority policies and procedures.

If the premises are owned by the Local Authority or the school has voluntary controlled status then the Governing Board should seek the consent of the Local Authority to the proposed works, but such consent can only be withheld on health and safety grounds. Voluntary Aided Schools must seek the permission of their relevant Diocese to undertake building work of over £2,000. Further guidance on requirements relating to the notification of building works to relevant bodies (the Local Authority and the Dioceses) can be found on Bradford Schools Online.

<https://bso.bradford.gov.uk/Schools/CMSPage.aspx?mid=3376>

Additional guidance for schools on buildings can be found on Bradford Schools Online

<https://bts.bradford.gov.uk/>

2.15 Notice of Concern

The Local Authority may issue a notice of concern to the Governing Board of any school it maintains where, in the opinion of the Chief Financial Officer and the Director of Children's Services, the school has failed to comply with any provisions of the Scheme, or where actions need to be taken to safeguard the financial position of the Local Authority or the school.

Such a notice will set out the reasons and evidence for it being made and may place on the Governing Board restrictions, limitation or prohibitions in relation to the management of funds delegated to it. These may include:

- insisting that relevant staff undertake appropriate training to address any identified weaknesses in the financial management of the school;
- insisting that an appropriately trained / qualified person chairs the finance committee of the Governing Board;
- placing more stringent restriction or conditions on the day to day financial management of a school than the Scheme requires for all schools – such as the provision of monthly accounts to the Local Authority;
- insisting on regular financial monitoring meetings at the school attended by Local Authority officers;
- requiring a Governing Board to buy into the Local Authority's financial management systems; and
- imposing restrictions or limitation on the manner in which a school manages extended school activity funded from within its delegated budget share – for example, by requiring a school to submit income projections and / or financial monitoring reports on such activities.

The notice will clearly state what these requirements are and the way in which and the time by which such requirements must be complied with in order for the notice to be withdrawn. It will also state the actions that the authority may take where the Governing Board does not comply with the notice.

Where the Governing Board has complied with the requirements of a notice of concern the notice will be withdrawn.

2.16 Schools Financial Value Standard

All local authority maintained schools (including nursery schools and Pupil Referral Units (PRUs) that have a delegated budget) must demonstrate compliance with the Schools Financial Value Standard (SFVS) and complete the assessment form on an annual basis. It is for the school to determine at what time in the year they wish to complete the form.

Governors must demonstrate compliance through the submission of the SFVS assessment form signed by the Chair of Governors. The form must include a summary of remedial actions with a clear timetable, ensuring that each action has a specified deadline and an agreed owner. Governors must monitor the progress of these actions to ensure that all actions are cleared within specified deadlines.

All maintained schools with a delegated budget must submit the form to the Local Authority annually before 31 March.

2.17 Fraud

All schools must have a robust system of controls to safeguard themselves against fraudulent or improper use of public money and assets.

The Governing Board and Headteacher must inform all staff of school policies and procedures related to fraud and theft, the controls in place to prevent them, and the consequences of breaching these controls. This information must also be included in induction for new school staff and governors.

SECTION 3: INSTALMENTS OF THE BUDGET SHARE; BANKING ARRANGEMENTS

3.1 Frequency of instalments

The Budget Share will be made available to schools on a monthly basis according to the following profile:

- an initial advance on 1 April
- 11 monthly instalments from April to February
- a final instalment in March from which the amount advanced on 1 April is deducted.

The date on which instalments are advanced each month will be the same for all schools and will include monthly reimbursements of net VAT expenditure incurred by schools. For the purposes of this section, Budget Share includes any place-led funding for special schools or pupil referral units. Top up payments for pupils with high needs are made on a monthly basis, unless alternative arrangements have been agreed with the provider.

3.2 Proportion of the budget share payable at each instalment

Schools will have the option of payment of budget share into their bank accounts:

- either net of staffing costs
- or the total budget share

In both cases, the amount paid each month will be 1/12 of the annual sum advanced (after allowing for the initial advance on 1 April as shown in section 3.1. above)

Where budget shares are advanced net of staffing costs, the schools' annual budget (see section 2.3) and any subsequent in-year revisions to the budget (see section 2.5) will be used to determine those amounts of budget shares held centrally for staffing, and those amounts payable into schools' bank accounts in equal monthly instalments.

A school wishing to change its option of payment of budget share may only do so from the beginning of a financial year and must notify the Local Authority in writing by 1 January.

Where a school wishes to receive its total budget share, but where the Authority is administering payroll for that school, then the LA will advise the school of the arrangements which need to be put in place and ask the school whether it needs to take up this option.

3.3 Interest clawback

The Chief Financial Officer will charge interest on those elements of advances of budget share which relate to pay costs in cases where these are advanced to schools earlier than the Local Authority's normal dates for paying employees. Interest will be calculated on a daily basis and charged at the Bank of England Base Rate plus 1%.

The same rate of interest will be charged to schools:-

- where schools ask for advances of budget share in advance of the standard timetable as outlined in section 3.2,
- where the Authority is administering payroll for the school and the school is late in making payment.

3.3.1 Interest on late budget share payments

The Authority will add interest to late payments of budget share instalments, where such late

payment is the result of Local Authority error. Interest will be calculated on a daily basis and paid at the Bank of England Base Rate plus 1%.

3.4 Budget shares for closing schools

Where approval for the closure of a school has been secured, the Local Authority may determine that budget shares will only be made available net of estimated pay costs, even where a different basis was previously used.

3.5 Bank and building society accounts

Schools are allowed to have external bank accounts into which their budget share instalments are paid. All interest received by schools from balances held in these accounts will be retained by schools.

Where a school opens an external bank account the Local Authority will, if the school desires, transfer immediately to the account an amount agreed by both the school and Local Authority as the estimated surplus balance held by the Local Authority in respect of the school's budget share, on the basis that there is then a subsequent correction when accounts for the relevant year are closed.

3.5.1 Restrictions on accounts

Schools are permitted only to hold school budget funds with Barclays, HSBC, Lloyds TSB and RBS (Nat West). Schools that, at 1 October 2012, did not hold school budget funds with RBS (Nat West) are not permitted to hold school budget funds with this bank.

In investing school budgets funds e.g. in deposit accounts, the maximum permitted period of investment is 1 year.

Schools are permitted to have accounts for budget share purposes, which are in the name of the school rather than the Authority. However, if a school has such an account the account mandate must provide that the Authority is the owner of the funds in the account; that it is entitled to receive statements; and that it can take control of the account if the school's right to a delegated budget is suspended by the Authority.

Schools must nominate at least 3 and at most 5 people to be authorised signatories, of which two will normally be the Headteacher and Deputy Headteacher. Authorised signatories must be employees either of the Local Authority or the school.

3.6 Borrowing by schools

This provision does not apply to loan Schemes run by the Authority (see section 4.9).

Governing Boards may borrow money only with the written permission of the Secretary of State. Borrowing includes the use of finance leases, which are not allowable, with the exception of certain schemes approved by the Secretary of State (currently only Salix loans have such approval).

Schools can use both debit cards and credit cards provided the balance is cleared each month. Schools are encouraged to use procurement cards, as these cards can be a useful means of facilitating electronic purchase.

3.7 Other provisions

Detailed guidance about the administrative procedures for operating external bank accounts is included in the Guide to Financial Procedures in Schools.

SECTION 4: THE TREATMENT OF SURPLUS AND DEFICIT BALANCES ARISING IN RELATION TO BUDGET SHARES

4.1 Right to carry forward surplus balances

At the end of each financial year, where any school has a surplus balance, this will be carried forward and added to the budget share for the following financial year. A school's opening balance at 1 April will equal its closing balance at 31 March the previous year.

4.2 Control on surplus balances

Schools must comply with the requirements for the reporting of surplus balances, outlined in detail in the [Authority's School Surplus Balances Protocol](#). The carry forward of surplus revenue balances into the next financial year is restricted by the provisions outlined in this Protocol. The Local Authority will consult with the Schools Forum and schools on proposed changes to the Protocol before these are implemented. The total of any amounts deducted from schools' budget shares by the Authority under this provision are to be applied to the Schools Budget of the Authority.

4.3 Interest on surplus balances

The Authority will not give interest on surplus carry forward balances, as the procedure for operating external bank accounts, as outlined in the Guide to Financial Procedures for Schools, allows each school to hold its surplus balance in its own bank account.

4.4 Obligation to carry forward deficit balances

At the end of each financial year, where any school has a deficit balance, this will be carried forward and deducted from the budget share for the following year. A school's opening balance at 1 April will equal its closing balance at 31 March the previous year.

4.5 Planning for deficit budgets

Schools wishing to apply for a deficit budget, or to increase an existing deficit, must apply to the Local Authority for approval who may allow them in approved circumstances (see section 4.9).

4.6 Charging of interest on deficit balances

Interest may be charged on deficits, whether approved or unplanned, on the basis of the Bank of England Base Rate plus 1%.

4.7 Writing off deficits

The Authority cannot write off the deficit balance of any school. Subject to the approval of the Schools Forum, additional funding to support schools in financial difficulty may come from a de-delegated contingency fund from the Dedicated Schools Grant for mainstream schools or from a central budget within the Dedicated Schools Grant for special schools and PRUs.

4.8 Balances of closing and replacement schools

Where in the funding period, a school has been established or is subject to a prescribed alteration as a result of the closure of a school, a local authority may add an amount to the budget share of the new or enlarged school to reflect all or part of the unspent budget share (including any surplus carried over from previous funding periods) of the closing school for the funding period in which it closes.

4.9 Licensed deficits

Schools wishing to apply for a deficit must apply to the Local Authority. Approval will only be given where:

- (i) the normal period for repayment is 3 years or less, however in exceptional circumstances the Authority will have the discretion to extend this period to 5 years
- (ii) the deficit is 5% of school budget share for that year or the deficit is for exceptional non-recurrent expenditure, transitional arrangements, or other exceptional circumstances
- (iii) the deficit can be financed from the collective surplus balances held by schools. The maximum proportion of schools' collective balances which will be used to finance these arrangements will be 25%.

Detailed guidance on the operational procedures of licensed deficits is included in the Guide to Financial Procedures in Schools and the [Authority's Deficit Budget Protocol](#). Licensed deficits must be approved by the Council's Chief Finance Officer or his / her representative.

4.10 Capital Loans Scheme

The Local Authority will operate a capital loans system for schools covered by the Scheme. Such loans will operate as actual payments to the school on condition that a corresponding amount, plus interest as outlined below, is repaid to the Local Authority from the school's budget share over an agreed period of time. The period of time is as listed at 4.9 (i) above.

The purposes for which applications for loans can be requested, the conditions and the application process, are outlined in the Authority's School Capital Loans Protocol. All loans are subject to the acceptance of the school's governing board of the terms and conditions of the Loan Agreement. All loans are subject to the approval of both the Schools Financial Performance Group, on behalf of the Schools Forum, and the Council's Chief Financial Officer or representative.

Under normal circumstances, a maximum of 50% of the overall cost of the works may be provided by a loan. Loans for a greater proportion of the cost may be approved in exceptional circumstances.

The maximum loan available to any one school is the lower of £100,000 or 5% of the school's delegated budget for the year (excluding surplus revenue carry forward), unless the Local Authority gives specific written agreement otherwise. Schools with an annual budget share of £650,000 or less will be exempt from this limit in recognition that a 5% limit places a restriction on the benefits to be gained from the scheme by very small schools.

The total value of loans current at any time will not exceed £1,000,000. This maximum will be reviewed on an annual basis.

The capital loans scheme is open to all schools, including those with their own bank accounts. However, for schools that operate their own bank accounts, interest will be charged on the loan. Interest will be calculated on an annuity basis using the Council's banking provider's rate. The actual rate of interest will initially be calculated at the Council's banking provider's rate at the time the loan is taken and will then be reviewed on a financial year basis, with the rate of interest for the next financial year being set at the Council's banking provider's rate in the March immediately preceding the start of the financial year. Interest will be charged from the date the advance is made. The interest and principal will be repaid in equal instalments each month.

Any change in the legal status of the school such that it ceases to be a maintained school shall not affect the validity of the Loan Agreement. In such circumstances, the Loan Agreement shall bind and inure to the benefit of any successor board to the school, which can be:

- a. any other school; or
- b. any other body established by legislation or statute in order substantially to perform any of the functions that had previously been performed by the school; or
- c. any private sector body, which substantially performs the functions of the school

Where a maintained school converts to academy status, the value of the loan outstanding at the point of conversion will be deducted from the value of balance to be transferred to the academy. The value of any outstanding amount, after this deduction, will be recovered from the academy.

Where a school that does not have a successor body closes with an outstanding loan amount and where the school's surplus balance is not sufficient to cover this, the remaining outstanding amount will be charged to the Schools Budget.

Schools are not be permitted to borrow other than through the Authority's scheme, except with the written permission of the Secretary of State, or where borrowing is undertaken by trustees or foundations and the debt is not serviced directly from a school's delegated budget.

Loans will only be used to assist schools in spreading the cost over more than one year of large one-off individual items of a capital nature that have a benefit to the school lasting more than one financial or academic year. Loans will not be used as a means of funding a deficit that has arisen because a school's recurrent costs exceed its current income. If loans are made to fund a deficit and a school subsequently converts to academy status, the Secretary of State will consider using the power under paragraph 13(4)(d) of Schedule 1 to the Academies Act 2010 to make a direction to the effect that such a loan does not transfer, either in full or in part, to the new Academy school.

SECTION 5: INCOME

5.1 Income from lettings

Schools may retain income from lettings of the school premises, subject to alternative provisions arising from any joint use or Private Finance Initiatives (PFI) agreements. Schools may cross-subsidise lettings for community and voluntary use with income from other lettings, provided the governing board is satisfied that this will not interfere to a significant extent with the performance of any duties imposed on them by the Education Acts, including the requirement to conduct the school with a view to promoting high standards of educational achievement. However, schools must have regard to directions issued by the Local Authority as to the use of school premises, as permitted under the School Standards and Framework Act 1998 for various categories of schools.

All income from lettings of school premises which would otherwise accrue to the Local Authority must be paid into the school's local bank account.

5.2 Income from fees and charges

Schools may retain income from fees and charges except where a service is provided by the Local Authority from centrally retained funds. However, schools are required to have regard to policy statements on charging produced by the Local Authority.

Income from boarding charges is collected on behalf of the Local Authority and should not exceed that needed to provide board and lodging for the pupils concerned.

All such income must be paid into the school's local bank account.

5.3 Income from fund raising activities

Schools are allowed to retain income from fund-raising activities.

5.4 Income from the sale of assets

Schools may retain the proceeds of sale of assets except where:-

- (i) the asset was purchased with non-delegated funds (where it will be for the Local Authority to decide whether the school can retain the proceeds),
- (ii) the asset concerned is land or buildings forming part of the school premises and is owned by the Local Authority.

5.5 Administrative procedures for the collection of income

Schools should comply with the recommended administrative and financial procedures contained in the Guide to Financial Procedures in Schools.

5.6 Purposes for which income may be used

School income from the sale of assets purchased with delegated funds may only be spent for the purposes of the school.

SECTION 6: THE CHARGING OF SCHOOL BUDGET SHARES

6.1 General provision

The budget share of a school can be charged by the Local Authority, without the consent of the Governing Board, only in the circumstances expressly stated in paragraph 6.2 below. The Local Authority must consult the school as to the intention to so charge, and notify the school when it has been done.

Where the charge relates to school-based staff, then the salaries charged to the schools budget share will be at actual cost.

(It should be noted that the Local Authority cannot act unreasonably in the exercise of this power, or it may be the subject of a direction under s.496 of the Education Act 1996).

The Local Authority may de-delegate funding for permitted services without the express permission of the governing board, provided this has been approved by the appropriate phase representatives of the Schools Forum.

6.1.1 Charging of salaries at actual cost

The Authority is required to charge salaries of school-based staff to school budget shares at actual cost.

6.2 Circumstances in which charges may be made:

- 6.2.1 Where premature retirement costs have been incurred without the prior written agreement of the Local Authority to bear such costs (the amount chargeable being only the excess over any amount agreed by the Local Authority);
- 6.2.2 Other expenditure incurred to secure resignations where the school has not followed Local Authority advice;
- 6.2.3 Awards by courts and employment tribunals against the Local Authority, or out of court settlements arising from action or inaction by the Governing Board contrary to the Local Authority's advice;
- 6.2.4 Expenditure by the Local Authority in carrying out health and safety work or capital expenditure for which the Local Authority is liable where funds have been delegated to the Governing Board for such work, but the Governing Board has failed to carry out the required work;
- 6.2.5 Expenditure by the Local Authority incurred in making good defects in building work funded by capital spending from budget shares, where the premises are owned by the Local Authority or the school has voluntary controlled status;
- 6.2.6 Expenditure incurred by the Local Authority in insuring its own interests in a school where funding has been delegated but the school has failed to demonstrate that it has arranged cover at least as good as that which would be arranged by the Local Authority;
- 6.2.7 Recovery of monies due from a school for services provided to the school, where a dispute over the monies due has been referred to a disputes procedure set out in a service level agreement, and the result is that monies are owed by the school to the Local Authority;
- 6.2.8 Recovery of penalties imposed on the Local Authority by the Board of HM Revenue and

Customs, the Contributions Agency or HM Customs and Excise, Teachers Pensions, the Environment Agency or regulatory authorities as a result of school negligence.

- 6.2.9 Correction of Local Authority errors in calculating charges to a budget share (eg pension deductions);
- 6.2.10 Additional transport costs incurred by the Local Authority arising from decisions by the Governing Board on the length of the school day, and failure to notify the Local Authority of non-pupil days resulting in unnecessary transport costs;
- 6.2.11 Legal costs which are incurred by the Local Authority because the Governing Board did not take or accept the advice of the Local Authority (see also section 10.4);
- 6.2.12 Costs of necessary health and safety training for staff employed by the Local Authority, where funding for training has been delegated but the necessary training not carried out;
- 6.2.13 Compensation paid to a lender where a school enters into a contract for borrowing beyond its legal powers, and the contract is of no effect;
- 6.2.14 Cost of work done in respect of teacher pension remittance and records for schools using non-Local Authority payroll contractors, the charge to be the minimum needed to meet the cost of the Authority's compliance with its statutory obligations;
- 6.2.15 Costs incurred by the Local Authority in securing provision specified in an Education, health and Care Plan (EHCP) where the governing board of a school fails to secure such provision despite the delegation of funds in respect of low cost high incidence SEN and / or specific funding for a pupil with High Needs;
- 6.2.16 Costs incurred by the Local Authority due to submission by the school of incorrect data;
- 6.2.17 Recovery of amounts spent from specific grants on ineligible purposes;
- 6.2.18 Costs incurred by the Local Authority as a result of the governing board being in breach of the terms of a contract;
- 6.2.19 Costs incurred by the Local Authority or another school as a result of a school withdrawing from a cluster arrangement, for example where this has funded staff providing services across the cluster.

SECTION 7: TAXATION

7.1 Value Added Tax (VAT)

Schools are required to follow the procedures detailed in the Guide to Financial Procedures for Schools to enable the Authority to reclaim from Customs and Excise VAT on expenditure relating to non-business activity, and pay over VAT on income generated. All such net VAT reclaimed by the Authority on behalf of a school will be passed back to the school.

7.2 Construction Industry Scheme (CIS)

Schools are required to follow the procedures detailed in the "Guide to Financial Procedures in Schools" in connection with the Construction Industry Scheme (CIS).

SECTION 8: THE PROVISION OF SERVICES AND FACILITIES BY THE AUTHORITY

8.1 Provision of services from centrally retained budgets

The Local Authority will determine the basis on which services from centrally retained funds will be provided to schools. (Such services include existing premature retirement costs and redundancy payments).

The Local Authority will not be allowed to discriminate in its provision of services on the basis of categories of schools except where such discrimination is justified by differences in statutory duties.

8.2 Provision of services bought back from the Local Authority using delegated budgets

The term of any arrangement with a school starting on or after 1 April 1999 to buy services or facilities from the Local Authority will be limited to a maximum of three years from the inception of the Scheme or the date of the agreement, whichever is the later, and periods not exceeding five years for any subsequent agreement relating to the same services.

When a service is provided for which expenditure is not retainable centrally by the Local Authority, under the Regulations made under section 45A of the Act, it must be offered at prices which are intended to generate income which is no less than the cost of providing those services. The total cost of the service must be met by the total income, even if schools are charged differentially.

8.2.1 Packaging

Any service which the Local Authority is providing on a buyback basis must be offered in a way which does not unreasonably restrict schools' freedom of choice among the services available, and where practicable, this will include provision on a service-by-service basis as well as in packages of services.

This provision will not prevent the Local Authority offering packages of services which offer a discount for schools taking up a wider range of services.

8.3 Service level agreements

Service level agreements must be in place, by 31 March to be effective for the following financial year and by the 31 August to be effective for the following academic year, and schools must have at least a month to consider the terms of agreements.

If services or facilities are provided under a service level agreement, whether free or on a buyback basis, the terms of any such agreement starting on or after the inception of the Scheme, will be reviewed at least every three years if the agreement lasts longer than that.

Services, if offered at all by the Local Authority, will be available on a basis which is not related to an extended agreement, as well as on the basis of such agreements. Where services are provided on an ad hoc basis, they may be charged for at a different rate than if provided on the basis of an extended agreement.

Centrally arranged premises and liability insurance are specifically excluded from the requirements listed in sections 8.2 to 8.3 as the limitations envisaged may be impracticable for insurance purposes.

Governing Boards have the right to opt out of service level arrangements arranged by the Authority provided that notice is given in accordance with the contract terms and, where no notice

period is set out, no less than 3 months notice should be given.

8.4 Teachers' Pensions

In order to ensure that the performance of the duty on the Authority to supply Teachers' Pensions with information under the Teachers' Pensions Regulations 2010 (as amended), the following conditions are imposed on the Authority and governing boards of all maintained schools covered by this Scheme in relation to their budget shares.

The conditions only apply to governing boards of maintained schools that have not entered into an arrangement with the Authority to provide payroll services.

A governing board of any maintained school, whether or not the employer of the teachers at such a school, which has entered into any arrangement or agreement with a person other than the Authority to provide payroll services, shall ensure that any such arrangement or agreement is varied to require that person to supply salary, service and pensions data to the Authority which the Authority requires to submit its annual return of salary and service to Teachers' Pensions and to produce its audited contributions certificate. The Authority will advise schools each year of the timing, format and specification of the information required. A governing board shall also ensure that any such arrangement or agreement is varied to require that additional voluntary contributions (AVCs) are passed to the authority within the time limit specified in the AVC Scheme. The governing board shall meet any consequential costs from the school's budget share.

A governing board of any maintained school which directly administers its payroll shall supply salary, service and pensions data to the Authority which the Authority requires to submit its annual return of salary and service to teachers' pensions and to produce its audited contributions certificate. The Authority will advise schools each year of the timing, format and specification of the information required from each school. A governing board shall also ensure that Additional Voluntary Contributions (AVCs) are passed to the Authority within the time limit specified in the AVC Scheme. The Governing Board shall meet any consequential costs from the school's budget share.

SECTION 9: INSURANCE

9.1 Insurance cover

If funds for insurance are delegated to any school, the Local Authority will require the school to demonstrate that cover relevant to the Local Authority's insurable interests, under a policy arranged by the Governing Board, is at least as good as the cover arranged by the Local Authority if the Local Authority makes such arrangements (either paid for from central funds or from contributions from schools' delegated budgets).

The Authority must have regard to the actual risks which might reasonably be expected to arise at the school in question in operating such a requirement, rather than applying an arbitrary minimum level of cover for all schools.

(see also 6.2.6)

SECTION 10: MISCELLANEOUS

10.1 Right of access to information

As well as specific requirements listed above, the Authority may require a Governing Board to supply all financial and other information which might reasonably be required to enable the Authority to satisfy itself as to the school's management of its delegated budget share, or the use made of any central expenditure by the Authority (eg earmarked funds) on the school.

10.2 Liability of governors

As the governing board is a corporate body, and because of the terms of s.50 (7) of the SSAF Act, governors of maintained schools will not incur personal liability in the exercise of their power to spend the delegated budget share, provided they act in good faith.

10.3 Governors' expenses

The LA may delegate to the Governing Board of a school yet to receive a delegated budget, funds to meet governors' expenses

Under the Education Act 2002, only allowances in respect of purposes specified in regulations may be paid to governors from a school's delegated budget share. There must be no payment of any other allowances. Schools must not make payment of expenses which duplicate those paid by the Secretary of State to additional governors appointed by him/her to schools under special measures.

10.4 Responsibility for legal costs

Legal costs incurred by the Governing Board, although the responsibility of the Local Authority as part of the cost of maintaining the school (unless they relate to the statutory responsibility of aided school governors for buildings) may be charged to the school's budget share unless the Governing Board acts in accordance with the advice of the Authority.

(see section 6.2.11)

The procedures which schools should follow in obtaining legal advice where there is a conflict of interest between the Local Authority and the Governing Board are outlined in the Guide to Financial Procedures in Schools.

Legal advice cannot be provided by the Local Authority to a school where this would lead to a conflict of interest with the Local Authority, for example, re-tendering of Local Authority services or TUPE matters. Advice on exclusions, admissions and special educational needs issues cannot be provided directly to schools unless this is in liaison with work carried out with Children's Services or directly at the request of the Local Authority.

10.5 Health and Safety

In expending the school's budget share, the Governing Board must have regard to duties placed on the LA in relation to health and safety, and the Authority's policy on health and safety matters.

10.6 Right of attendance for Chief Financial Officer

The Chief Financial Officer of the authority, or his/her duly nominated representative, shall have the right to attend any meeting of a school Governing Board to give advice on any matters affecting the school's financial position or arrangements. The Authority will give prior notice of such attendance unless it is impracticable to do so.

10.7 Special Educational Needs

Schools should use their best endeavours to secure the most effective provision possible for pupils with SEN, in spending their delegated budget share. This is a statutory requirement. The provision is included within this Scheme to allow the Local Authority to suspend delegation where a situation is serious to warrant it. The same is required in spending devolved SEN funding.

10.8 Interest on late payments

Schools covered by the Scheme must act in accordance with the statutory requirements of the Late Payment of Commercial Debts (Interest) Act 1998 (as amended).

10.9 'Whistleblowing'

The Authority has in place a Whistleblowing Code. This provides for individuals to raise concerns in a confidential way that avoids any public disclosure and for workers to do so without fear of victimisation, subsequent discrimination or disadvantage when "blowing the whistle". The Code also sets out clearly the process to be followed, including the safeguards, how to raise a concern, how the Authority will respond and how the matter can be taken further.

The Council's Whistleblowing Code can be found on the Council's Internet site under the section on the Council's constitution, and summarised guidance is included in the Guide to Financial Procedures in Schools.

The reporting of financial irregularities to the Council's Chief Financial Officer under Financial Regulations for Maintained Schools remains a responsibility of all members of school staff, Governors and Governing Boards. If an individual prefers to do so, the reporting of financial irregularities may be raised under the Confidential Reporting Code in a confidential way that avoids public disclosure of their identity.

The Governing Board must record information about these responsibilities and procedures in appropriate information provided to all staff and Governors

10.10 Child Protection

The School should release staff to attend child protection case conferences and other related events such as court proceedings. The Governing Board is responsible for the costs of this.

10.11 The charging of redundancy and early retirement costs of school staff - framework

The Local Authority's framework follows the requirements and provisions of the 2002 Education Act (s.37) that,

a. costs incurred by the Local Authority in respect of any premature retirement of a member of the staff of a maintained school shall be met from the school's budget share for one or more financial years except in so far as the Authority agrees with the governing board in writing (whether before or after the retirement occurs) that the costs shall not be so met (see 10.11.2),

b. costs incurred by the Local Authority in respect of the dismissal, or for the purpose of securing the resignation, of any member of the staff of a maintained school shall not be met from the school's budget share for any financial year except in so far as the authority has good reason for deducting those costs, or any part of those costs from that share (see 10.11.3). The reference to dismissal by reason of redundancy shall be read in accordance with section 139 of the Employment Rights Act 1996 (c.18).

10.11.1 Redundancy / Early Retirement Costs

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Costs incurred by the Local Authority under 10.11 may only be charged to the central schools services block of the schools budget, as a historic commitment, where the expenditure is to be incurred as a result of decisions made before 1 April 2013. Costs charged may not exceed the amount budgeted in the previous financial year.

The local authority is permitted to retain a central budget within the schools budget to fund the costs of new early retirements or redundancies by a deduction from maintained school budgets (excluding nursery schools) only, where the relevant maintained school members of the schools forum agree.

Costs not charged to the relevant school's delegated budget share, the central schools services block or to a fund established by a deduction from maintained school budgets (excluding nursery schools) shall be charged to the Local Authority's non-schools budget.

10.11.2 Circumstances under which consideration may be given for the costs (wholly or partly) of premature retirement of school staff not to be charged to the school's budget share

- a. Where a school has a long term reduction in pupil numbers and charging such costs to their budget would impact on standards;
- b. Where a school is closing and does not have sufficient balances to cover the costs;
- c. Where charging such costs to the school's budget share would prevent the school from complying with a requirement to recover a licensed deficit within the agreed timescale;
- d. Where a school is in special measures, does not have sufficient balances and where employment of the relevant staff is being or has been terminated as a result of Local Authority or Government intervention to improve standards.

In such cases, the Schools Forum may firstly consider supporting the financial position of maintained schools, to be able to meet these costs, via an established 'schools in financial difficulty' de-delegated contingency.

10.11.3 Circumstances under which consideration may be given for the costs (wholly or partly) of dismissal or resignation of school staff to be charged to a school's delegated budget share

The Local Authority may propose to the Schools Forum that the costs (wholly or partly) of dismissal or resignation of school staff are charged to the relevant school's budget share where the school,

- a. Is making staffing reductions which the Local Authority does not believe are necessary to either set a balanced budget or to meet the conditions of a licensed deficit;
- b. Is making staffing reductions arising from a deficit caused by factors within the control of the school;
- c. Has excess surplus balances and no agreed plan to use these;
- d. Has acted outside the Local Authority's policy;
- e. Has refused to engage with the Local Authority's redeployment policy;
- f. Has decided to offer more generous terms than the Local Authority's policy, where the excess may be charged to the school.

10.12 The charging of redundancy and early retirement costs for staff employed by schools for community purposes

Where the Local Authority incurs costs:

- a. in respect of any premature retirement of any member of the staff of a maintained school who is employed for community purposes, or
- b. in respect of the dismissal, or for the purposes of securing the resignation, of any member of the staff of a maintained school who is employed for community purposes,

the Local Authority shall recover those costs from the governing board except in so far as the Local Authority agrees with the governing board in writing (whether before or after the retirement, dismissal or resignation occurs) that they shall not be so recoverable.

Any amount payable by the governing board of a maintained school to the Local Authority may be met by the governing board out of the school's budget share for any funding period if and to the extent that the condition below is met.

The condition is that the governing board are satisfied that meeting the amount out of the school's budget share will not to a significant extent interfere with the performance of any duty imposed on them by the Education Acts, including the requirement to conduct the school with a view to promoting high standards of educational achievement.

Where a person is employed partly for community purposes and partly for other purposes, any payment or costs in respect of that person is to be apportioned between the two purposes; and the preceding provisions of this section shall apply separately to each part of the payment or costs.

SECTION 11: RESPONSIBILITY FOR REPAIRS AND MAINTENANCE

- 11.1 Annex B shows the categories of work which Governing Boards must expect to finance from their delegated budget.
- 11.2 The Local Authority will delegate all funding for repairs and maintenance to schools. Only capital expenditure will be retained by the Authority. Expenditure will be treated as capital only where it fits the definition of capital used by the Authority for financial accounting purposes in line with the CIPFA Code of Practice on local authority accounting.
- 11.3 In determining what is classified as capital expenditure, the Authority will use the DfE's interpretation of the CIPFA Code of Practice as detailed in Annex B. For Voluntary Aided schools, the liability of the Authority for repairs and maintenance (albeit met by delegation of funds through the budget share) is the same as for other maintained schools, and no separate list of responsibilities is necessary for such schools. However eligibility for capital grant from the Secretary of State for capital works at voluntary aided schools depends on the de minimis limit applied by the DfE to categorise such work, not the de minimis limit used by the Authority.

SECTION 12: COMMUNITY FACILITIES

12.1-2 Introduction

Schools which choose to exercise the power conferred by s.27 (1) of the Education Act 2002 to provide community facilities will be subject to a range of controls. First, regulations made under s.28 (2), if made, can specify activities which may not be undertaken at all under the main enabling power. Secondly, the school is obliged to consult the LA and have regard to any advice from the authority. Thirdly, the school must also have regard to guidance issued by the Secretary of State about a range of issues connected with exercise of the power.

Under s.28 (1), the main limitations and restrictions on the power will be

- a. those contained in schools' own instruments of government, if any; and
- b. those in the maintaining Local Authority's Scheme for financing schools made under s.48 of the School Standards and Framework Act 1998. Paragraph 2 of Schedule 3 to the Education Act 2002 extends the coverage of Schemes to the powers of governing boards to provide community facilities. Schools are therefore subject to prohibitions, restrictions and limitations in the Scheme for financing schools.

This section of the Scheme does not extend to joint-use agreements; transfer of control agreements, or agreements between the Authority and schools to secure the provision of adult and community learning.

12.2 Mismanagement of community facilities funds may be grounds for suspension of the right to a delegated budget.

12.3 Consultation with the Local Authority – Financial Aspects

Governing boards must consult the Local Authority, and have regard to advice given to them by their LA, before exercising this power. The Authority will make no charge for this advice

12.4-5 Funding Agreements – Authority Powers

12.4 The provision of community facilities in schools may be dependent on the conclusion of a funding agreement with a third party which will either be supplying funding or supplying funding and taking part on the provision. The funding agreement should contain the provisions required by 12.11 below.

12.5 Any proposed agreement should be submitted to the Local Authority for its comments. However, the Local Authority will not impose a right of veto on such agreements, either directly or through requiring a right to countersign the agreement.

If an agreement has been or is to be concluded against the wishes of the Local Authority, or has been concluded without informing the Local Authority, which in the view of the Authority is seriously prejudicial to the interests of the school or the Authority, this may constitute grounds for suspension of the right to a delegated budget.

12.6-7 Other Prohibitions, restrictions and limitations

12.6 The Local Authority may, in a particular case, require the governing board to make arrangements to protect the financial interests of the Authority by either carrying out the activity concerned through the vehicle of a limited company formed for the purpose, or by obtaining indemnity insurance for risks associated with the project in question, as specified by the Local

Authority. However, this requirement will only be imposed where the Authority believes that the proposed project carries significant financial risks.

12.7 The exercise of the community facilities power is subject to restrictions and limitations as contained in this Scheme and the Financial Regulations for Maintained Schools.

12.8-9 Supply of financial information

12.8 Those schools which exercise the community facilities power will provide to the Authority an annual summary statement, in a form determined by the Authority, showing the income and expenditure for the school arising from the facilities in question.

12.9 Where the Authority, on giving notice to the school that it believes there to be cause for concern as to the school's management of the financial consequences of the exercise of the community facilities power, will require such financial statements to be supplied every three months and, if necessary may require the submission of a recovery plan for the activity in question.

12.10-11 Audit

12.10 The school is required to grant access to the school's records connected with exercise of the community facilities power, in order to facilitate internal and external audit of relevant income and expenditure.

12.11 Any funding agreements made with third parties should allow access by the Authority to the records and other property of those persons held on the school premises, or held elsewhere insofar as they relate to the activity in question, in order for the Authority to satisfy itself as to the propriety of expenditure on the facilities in question.

12.12-14 Treatment of income and surpluses

12.12 Schools will be allowed to retain all net income derived from community facilities except where otherwise agreed with a funding provider, whether that be the Local Authority or some other person.

12.13 Schools will be able to carry over retained net income from one financial year to the next as a separate community facilities surplus, or, subject to the agreement of the Authority at the end of each financial year, transfer all or part of it to the budget share balance.

12.14 Where the school is a community or community special school, and the Authority ceases to maintain the school, any accumulated retained income obtained from exercise of the community facilities power reverts to the Authority, unless otherwise agreed with a funding provider.

12.15-16 Health and Safety

12.15 Health and safety provisions contained within this Scheme also extend to the provision of community facilities.

12.16 The governing board is responsible for the costs of securing a Disclosure and Barring Service Check clearance for all adults involved in community activities taking place during the school day. Governing boards will be free to pass on such costs to a funding partner as part of an agreement with that partner.

12.17-18 Insurance

12.17 The governing board is responsible for ensuring adequate arrangements are made for insurance against risks arising from the exercise of the community facilities power. Such insurance should not be funded from the school budget share. The school must seek the Authority's advice before finalising any insurance arrangement for community facilities.

12.18 The Local Authority may undertake its own assessment of the insurance arrangements made by a school in respect of community facilities, and if it judges those arrangements to be inadequate, may make arrangements itself and charge the resultant cost to the school. Such costs would not be charged to the school's budget share.

12.19-21 Taxation

12.19 Schools should seek the advice of the LA and the local VAT office on any issues relating to the possible imposition of Value Added Tax on expenditure in connection with community facilities, including the use of the local authority VAT reclaim facility.

12.20 If any member of staff employed by the school or Local Authority in connection with community facilities at the school is paid from funds held in a school's own bank account, the school is likely to be held liable for payment of income tax and National Insurance, in line with HM revenue and Customs rules.

12.21 Schools are required to follow Local Authority advice in relation to the Construction Industry Scheme where this is relevant to the exercise of the community facilities power.

12.22-24 Banking

12.22 Governing boards must ensure that income and expenditure relating to community-focused school activities can be separately identified. It is not a requirement for schools to maintain separate bank accounts for budget share and community-focused school activities. However, in making a decision on banking arrangements, the governing board of a school must have regard to the advice given by the Local Authority within the Guide to Financial Procedures.

12.23 Where a school operates separate bank accounts for community-focused school activities, these accounts must be operated in accordance with the procedures detailed in this Scheme, Financial Regulations for Maintained schools and the Guide to Financial Procedures.

12.24 Schools are reminded that they may not borrow money without the written consent of the Secretary of State. This requirement does not extend to monies lent to schools by the Authority.

**ANNEX A: LIST OF BRADFORD LOCAL AUTHORITY MAINTAINED SCHOOLS AT 1
SEPTEMBER 2018**

PRIMARY SCHOOLS

Addingham Primary School
All Saints' CE Primary School (Bradford)
All Saints' CE Primary School (Ilkley)
Ashlands Primary School
Baildon CE Primary School
Bankfoot Primary School
Ben Rhydding Primary School
Blakehill Primary School
Bowling Park Primary School
Brackenhill Primary School
Burley & Woodhead CE Primary School
Burley Oaks Primary School
Carrwood Primary School
Cavendish Primary School
Clayton Village Primary School
Cottingley Village Primary School
Crossflatts Primary School
Crossley Hall Primary School
Eastburn Junior and Infant School
Eldwick Primary School
Fagley Primary School
Farfield Primary
Fearnville Primary School
Foxhill Primary School
Frizinghall Primary School
Girlington Primary School
Glenaire Primary School
Greengates Primary School
Grove House Primary School
Heaton St Barnabas' CE Primary School
Hill Top CE Primary School
Home Farm Primary School
Hoyle Court Primary School
Idle CE Primary School
Ingrow Primary School
Keelham Primary School
Keighley St Andrew's CE Primary School
Killinghall Primary School
Knowleswood Primary School
Ley Top Primary School
Lidget Green Primary School

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Lister Primary School
Long Lee Primary School
Low Ash Primary School
Low Moor CE Primary School
Lower Fields Primary School
Marshfield Primary School
Menston Primary School
Miriam Lord Community Primary School
Myrtle Park Primary School
Newby Primary School
Newhall Park Primary School
Oldfield Primary School
Our Lady & St Brendan's Catholic Primary School
Parkland Primary School
Peel Park Primary School
Poplars Farm Primary School
Princeville Primary School and Children's Centre
Riddlesden St Mary's CE Primary
Russell Hall Primary School
Saltaire Primary School
Sandal Primary School and Nursery
Sandy Lane Primary School
ShIPLEY CE Primary School
Silsden Primary School
St Anthony's Catholic Primary School (Clayton)
St Anthony's Catholic Primary School (ShIPLEY)
St Clare's Catholic Primary School
St Columba's Catholic Primary School
St Cuthbert & the First Martyrs' Catholic Primary
St Francis' Catholic Primary School
St Joseph's Catholic Primary School (Bingley)
St Joseph's Catholic Primary School (Bradford)
St Luke's CE Primary School
St Mary's and St Peter's Catholic Primary School
St Matthew's Catholic Primary School
St Matthew's CE Primary School
St Paul's CE Primary School
St Stephen's CE Primary School
St William's Catholic Primary School
Stanbury Village School
Steeton Primary School
Stocks Lane Primary School
Swain House Primary School
Thackley Primary School

Thorpe Primary School
Trinity All Saints CE Primary School
Wellington Primary School
Wibsey Primary School
Worthinghead Primary School
Wycliffe CE Primary School

SECONDARY SCHOOLS

Bingley Grammar School
Carlton Bolling College
Hanson School
Parkside School
St Bede's and St Josephs's Catholic College
The Holy Family Catholic School
Titus Salt School

NURSERY SCHOOLS

Abbey Green Nursery School & Children's Centre
Canterbury Nursery School & Children's Centre
Hirst Wood Nursery School
Lilycroft Nursery School
Midland Road Nursery School & Children's Centre
St Edmund's Nursery School & Children's Centre
Strong Close Nursery School & Children's Centre

SPECIAL SCHOOLS

Beechcliffe Special School
Chellow Heights Special School
Delius Special School
Oastler School

PUPIL REFERRAL UNITS

Bradford Central PRU
Bradford District PRU
Primary PRU
Ellar Carr PRU
Tracks PRU
Education in Hospital – BRI
Education in Hospital – Airedale

ANNEX B: CAPITAL / REVENUE SPLIT AND ITEMS WHICH ARE THE SEPARATE RESPONSIBILITY OF GOVERNORS IN VA SCHOOLS

ILLUSTRATIVE EXAMPLES IN LINE WITH DfE's INTERPRETATION OF THE CIPFA CODE OF PRACTICE

NB ACTUAL INTERPRETATION OF CIPFA CODE OF PRACTICE FOR THESE PURPOSES WILL BE FOR EACH LOCAL AUTHORITY

| ELEMENT | RESPONSIBILITY FOR MAJOR WORKS & STRUCTURAL REPAIRS AND MAINTENANCE (CAPITAL FUNDED) CAPITAL: AS CIPFA CODE OF PRACTICE LA – CAPITAL VA – LCVAP SCHOOLS – FORMULA DEVOLVED ALLOCATION | SCHOOL RESPONSIBILITY FOR PLANNED REPAIRS & MAINTENANCE (REVENUE FUNDED) |
|---------|--|--|
|---------|--|--|

Roofs

| | | |
|-------------|---|--|
| <u>Flat</u> | Structure. New (not replacement) structure | Repair/replacement of small parts of an existing structure |
| | Structure. Replacement of all or substantial part of an existing structure to prevent imminent or correct actual major failure of the structure | Replace small areas of rotten or defective timber, make good minor areas of spalling concrete where reinforcing bars exposed |
| | Screed / insulation in a new building/extension | Repair/replacement of screed/ insulation where defective. |
| | Screed / insulation. Replacement/repair of substantially all. Improve effectiveness of insulation | Work to improve insulation standards, during work to repair/ replace small areas of roof. |
| | Finish on new build. Replacement of all/substantially all on existing roof | Replacement of roof finish on existing building. Re-coating chippings to improve life expectancy |
| | Edge Trim/ Fascia on new build | Repairs/ replacement. (uPVC) Repainting. |
| | Edge Trim/ Fascia, Replacement of all/substantially all on existing roof | Repairs/ replacement. (uPVC) Repainting. |
| | Drainage on new build | Clearing out gutters and downpipes. Replacement/repair/ repainting of/ individual gutters/pipes |
| | Other e.g. Flashings, Rooflights on new build Replacement of all/substantially all on existing roof | Repair/ Replacement/ cleaning of individual items |

| | | |
|----------------|---|--|
| <u>Pitched</u> | Structure. New (not replacement) structure | Repair/replacement of small parts of an existing structure |
| | Structure. Replacement of all or substantial part of an existing structure to prevent imminent or correct actual major failure of the structure | Replace/ repair small areas of rotten/ defective joists, rafters, purlins etc. Not complete trusses |
| | Insulation in a new building/extension | Repair/replacement/ increasing thickness of insulation in an existing roof |
| | Insulation. Replacement /repair of substantially all. Improve insulation to current standards | |
| | Roof finish in a new building/extension, replacement of all/substantially all on existing roof | Replace missing/ damaged small parts |
| | Bargeboards/ Fascias in a new building/extension, replacement of all/substantially all on existing roof | Repairs/ replacement/ Repainting |
| | Drainage in a new building/extension | Clearing out gutters and downpipes. Replacement/repairs of individual pipes/gutters |
| | Drainage. Replacement of all/substantially all on existing roof | |
| <u>Other</u> | Other e.g. Flashings, Roof windows in a new building/extension, replacement of all/substantially all on existing roof | Repair/ Replacement /cleaning |
| | Provide new covered link etc. between existing buildings | Minor repairs, maintenance to existing covered link |
| | Rebuild or substantially repair structure of existing covered link Add porch etc. to existing building | Minor repairs, maintenance to existing structure |
| | Rebuild or substantially repair structure of existing porch | |

Floors

| | | |
|---------------------|--|--|
| <u>Ground Floor</u> | Structure and dpc in new building | Repair/replacement of small parts of an existing structure |
| | Structure and dpc - Replacement of all | |

| | | |
|--------------------------|---|--|
| | or substantial part of an existing structure to prevent imminent or correct actual major failure of the structure | |
| | Screed and finish in new build, replacement of all/substantially all on existing floor - e.g. replacement of most carpets/ tiles in a room | Replacement and repair of screed and finishes/ Replacement of mats/ matwells. Maintenance e.g. revarnishing wooden floors. |
| <u>Upper Floor</u> | Structure - as ground floor | As ground floor |
| | Screed and Finish - as ground floor | Repairs of finishes/ Replacement - as ground floor |
| Ceilings | | |
| <u>Top/ only storey</u> | Suspension | Repair/ replacement incl. From water damage, & necessary decoration |
| | Membrane | |
| | Fixed | Repair/ replacement inc. from water damage |
| | Access panels | Repair/ replacement |
| <u>Lower storeys</u> | Suspension | Repair/ replacement |
| | Membrane | |
| | Fixed | Repair/ replacement |
| <u>All</u> | Specialist removal/ replacement of damaged/ disturbed Asbestos based materials, planned or emergency | Inspection/ air testing Applying sealant coats to asbestos surfaces for protection |
| External walls | | |
| <u>Masonry/ cladding</u> | Structure Underpinning/ propping for new build | Repairs Preventive measures e.g. tree removal |
| | External Finish on new build | Repair/replacement of small parts of an existing structure. e.g. repointing/ recladding a proportion of a wall where failure has occurred. |
| | External Finish on existing build where needed to prevent imminent or correct actual major failure of the structure. e.g. repointing/recladding work affecting most of a building /replacement build | |

| | | |
|----------------------------|--|---|
| <u>Windows and Doors</u> | Framing - new build | Repair/ replacement of individual frames. Repainting frames |
| | Framing - structural replacement programme | Repair/ replacement of individual windows. Repainting frames |
| | Glazing - new build | Replacing broken glass |
| | Glazing Upgrading existing glazing | |
| | Ironmongery Improved security | Repair/ replacement, upgrading locks etc. |
| | Jointing including mastic joints | |
| | Internal and external decorations to new build | Internal and external decoration to include cleaning down and preparation. |
| <u>Masonry chimneys</u> | Structure | |
| | Jointing including expansion and mortar joints/ pointing/ DPC | Repair/ re-pointing |
| Internal walls | | |
| <u>Solid</u> | Complete including various internal finishes, linings and decorations | Repairs and redecoration to internal plaster/ linings tiles, pin boards etc. |
| | Refurbishment and alterations | Minor alterations |
| <u>Partitions</u> | Complete structure including linings, framing, glazing, decoration etc. | Repairs and redecoration. |
| | Refurbishment and alterations | Minor alterations |
| <u>Doors & Screens</u> | Framing/ Screens/ Doors to new buildings including glazing, ironmongery, jointing and internal decorations | Internal maintenance and redecoration. Repair/ replacement of defective doors and screens |
| <u>All</u> | Glazing to meet statutory Health & Safety requirements | Replacement of broken glass |
| Sanitary Services | | |
| <u>Lavatories</u> | In new buildings provision of all toilet fittings, waste plumbing and internal drainage. | Repair/ replacement of damaged sanitary ware, fittings, waste plumbing etc. |
| | Large scale toilet refurbishment | Small areas of refurbishment |
| | Provision of disabled facilities, and | Repair/ replacement of damaged |

specialist facilities related to pupils with statements

fittings, waste plumbing etc.

Kitchens

Kitchens in new buildings, complete with fittings, equipment, waste plumbing and internal drainage. Internal finishes and decorations.

Maintain kitchen to requirements of LA

Cleaning out drainage systems

General refurbishment

Redecoration
Repairs

Large and costly items of equipment

Repairs/ replacement parts

Mechanical services

Heating/ hot water

Complete heating and hot water systems to new projects, including fuel, storage, controls, distribution, flues etc.

General maintenance of all boiler house plant including replacement of defective parts.
Regular cleaning.
Energy saving projects

Safe removal of old/ damaged asbestos boiler and pipework insulation, where risk to Health & Safety.

Monitoring systems

Planned replacement of old boiler/ controls systems past the end of their useful life

Health & safety issues

Replacement of defective parts

Emergency replacement of boiler plant/ systems

Cold water

Provision of cold water services, storage tanks, distribution, boosters, hose reels etc. in major projects

Maintenance and repair/ replacement of defective parts such as servicing pipes. Annual servicing of cold water tanks.

Gas

Distribution on new and major refurbishment's, terminal units

Repairs, maintenance and gas safety

Ventilation

Mechanical ventilation/ air conditioning to major projects

All servicing
Provision of local ventilation.
Repair/ replacement of defective systems and units

Other

Swimming pool plant and its complete installation, including heat recovery systems

Repair/ replacement of parts to plant, pumps and controls. Water treatment equipment and all distribution pipework.
Simple heat recovery systems.
Solar heating plant and equipment.

Electrical services

| | | |
|------------------------------|---|---|
| <u>General</u> | Main switchgear and distribution in major projects. | Testing/ replacement of distribution boards. The repair and maintenance of all switchgear and interconnecting cables including that in temporary buildings. |
| | Replacement of obsolete and dangerous wiring systems, including distribution boards | All testing, earthing and bonding to meet Health & Safety. All servicing. |
| <u>Power</u> | Control gear, distribution, fixed equipment, protection etc. | All testing, repair and replacement of small items of equipment |
| <u>Lighting</u> | Provision of luminaires and emergency | Replacement of luminaires, all testing, adjustments and improvements to emergency |
| <u>Other</u> | Lightning protection in new build | Repair/ replacement |
| | Alarm systems, CCTV, lifts/ hoists etc., | Repair and maintenance |
| | New installation of communication systems, radio/ TV, call, telephone, data transmission, IT etc. and provision in new build. | Repair/ replacement/ maintenance, including all door access systems |
| External Works | | |
| <u>Pavings</u> | Provision of new roads, car parks, paths, court, terraces, play pitches, steps and handrails, as part of major project, including disabled access | Maintenance and repair Car park and playground markings. |
| <u>Miscellaneous</u> | Provision of walls, fencing, gates and ancillary buildings as part of major project | Maintenance and repair of all perimeter/ boundary/ retaining walls, fencing and gates. |
| <u>Drainage</u> | Drains, soakaways, inspection chambers and sewage plant as part of new projects | Maintenance and repair of drains, gullies, grease traps and manholes between buildings and main sewers. Cleaning of the above and unblocking as necessary. |
| <u>Open air pools</u> | Structure, Hygiene/ safety in new build | Hygiene, cleaning, maintenance and repairs, including replacement parts. Simple energy saving systems. |
| <u>Services distribution</u> | Heating mains gas mains water mains electricity mains, renewal of any above. | Annual servicing |

Notes

This illustrative list is the DfE's interpretation of the CIPFA Code of Practice and the Authority refers to this Code when defining capital and revenue.

Where the authority use de minimis limits for defining capital and revenue in their financial accounts, the same de minimis limits is used in defining what is delegated. The application of a de minimis limit may change the examples given in the first two columns of the illustrative list.

Schools Forum Document JO Appendix 1

Consultation on Amendment to the Authority's Scheme for Financing Schools and Revision / Re-Issue of the Authority's Financial Regulations for Maintained Schools and Schools Contract Standing Orders

1.1 Financial Regulations for Maintained Schools

- 1.1.1 The document has been amended throughout to update references to legislation and adjusted references to Authority policies and Authority director / officer job, team and committee titles. Regulations have been re-numbered and merged in places to incorporate additions and deletions. Reference to all out of date requirements, such the requirement for an annual Best Value Statement, have been removed. References to the 'Education Client' have also been removed as this is no longer relevant.
- 1.1.2 The following provisions have been added i.e. these are not present in the current document and they add to the requirements placed on schools in their financial management:
- 1.1.2.1 Regulation 25 – Prevention of money laundering.
- 1.1.2.2 Regulation 26 – Value Added Tax (VAT).
- 1.1.2.3 Regulation 27 – School Companies.
- 1.1.2.4 Regulation 28 – Partnerships and Joint Ventures.
- 1.1.2.5 Regulation 29 – Proposals to Transfer Services to an External Provider.
- 1.1.3 The following provisions are already contained within the current document in some form, but have either been materially amended i.e. they add to or alter the requirements placed on schools, or have been substantially re-written to improve clarity:
- 1.1.3.1 Regulation 1 – Application. Paragraph 1.4 (clarification that the Governing Body can delegate some but not all powers to the Headteacher). Paragraph 1.7 (added that exceptions to the FRfMS must be reported to the Governance and Audit Committee annually).
- 1.1.3.2 Regulation 2 – Financial Controls and Procedures. Paragraph 2.1 (added that school staff must comply with the Governing Body's accounting and financial systems).
- 1.1.3.3 Regulation 4 – Provision of Financial Information and Reports. Paragraph 4.4 (added that Governing Bodies must comply with the Schools Financial Value Standard). Paragraph 4.5 (added that Governing Bodies must comply with additional reporting requirements set by the DfE).
- 1.1.3.4 Regulation 5 – School Staff Remuneration. Paragraph 5.1 (added the requirement for all payments to workers to comply with IR35 regulations).
- 1.1.3.5 Regulation 6 – Cash, Banking and Investments. Paragraph 6.1 (amended simply to match the existing provisions of the Scheme for Financing Schools, which control school banking and investment arrangements). Paragraph 6.2 (added simply to reflect the requirement to report banking arrangements that are already set out in the Authority's annual financial year-end guidance).
- 1.1.3.6 Regulation 7 – Borrowing Arrangements. All paragraphs have been amended to provide more clarity on the definition of leases and hire purchase agreements. Paragraph 7.5 (added the requirement that schools obtain legal advice before entering into leases to ensure they do not enter inadvertently into finance leases).

- 1.1.3.7 Regulation 9 – Expenditure Requirements. Paragraph 9.4 (amended to clarify the Headteacher’s responsibility to report concerns to the S151 Officer (which is the Council’s Chief Financial Officer)).
- 1.1.3.8 Regulation 12 – Income Arrangements. Paragraphs have been updated to better cover the issues that the Governing Body must consider in the provision of external services and the requirements of such contracts to be in writing. Paragraph 12.5 (added a provision regarding credit notes). Paragraph 12.6 (amended the provision on the authorisation of debt write-off).
- 1.1.3.9 Regulations 13 - Review of Fees, Charges, Remissions and Use of Premises (amended to be clearer about the requirement for annual review).
- 1.1.3.10 Regulations 15 & 16 – Management of Assets. Paragraph 15.2 (added a reference to attractive and portable items). Paragraph 16.1 (added the requirement to arrange the safekeeping of private property).
- 1.1.3.11 Regulation 17 – Private Funds and Community Facilities (removed the requirement to have funds relating to community facilities held separately, reflecting the already adjusted DfE directed provisions of the Scheme for Financing Schools).
- 1.1.3.12 Regulation 18 – Information Management (added reference to the SIRO and the IAO).
- 1.1.3.13 Regulation 19 – Contracting Arrangements (Schools Contract Standing Orders has become a separate document so this provision now refers only to this document. The numerous individual provisions on SCSOs in the current FRfMS have been deleted).
- 1.1.3.14 Regulation 23 – Public Accountability Requirements. Paragraph 23.5 (amended to reflect current DfE requirements for the registration of interests and the publication of these). Paragraph 23.6 (added the requirement for the reporting of the suspicion of or known financial irregularity or loss to the Authority’s Corporate Fraud Unit).

1.2 Schools Contract Standing Orders

- 1.2.1 The Schools Contract Standing Orders were previously included within the Financial Regulations for Maintained Schools. The Authority proposes now to separate these into a separate document.
- 1.2.2 The proposed re-issued version of the SCSOs, at Appendix 2, includes a substantial amount of non-material technical change, in particular to update references to legislation and Authority committees but also to improve clarity. The proposed SCSOs have been written in a format that is more in line with the Standing Orders used by the Authority.
- 1.2.3 The most significant amendment that is proposed is to increase the threshold above which 4 written quotations are required to be sought; from £4,000 to £10,000 (paragraph 6). This is proposed with specific reference to feedback from Internal Audit around enforcement and compliance, recognising that the current £4,000 threshold has not been uplifted for some time. Under the proposals, schools would be required to seek 4 written quotations where goods and services have a value between £10,000 and £75,000. Schools must still be able to demonstrate best value for money on purchases below £10,000 and this may include still seeking written quotations.
- 1.2.4 The proposed re-draft of the SCSOs removes all references to selective tendering, or an expectation regarding the use of Council approved supplier lists, as this is no longer permitted.
- 1.2.5 The proposed re-draft also is written to encourage schools to use the Authority’s existing contract templates (for specifying contract conditions; paragraph 17) and to emphasise the requirements placed on schools to comply with IR 35 Regulations where contracts include payments for professional services (paragraph 16).

1.3 Scheme for Financing Schools

- 1.3.1 The Scheme was most recently re-issued at 1 April 2018 to incorporate revisions directed by the Department for Education. The Authority took the opportunity to amend the document at this time to ensure that references to legislation and Authority officer / director titles remain accurate.
- 1.3.2 Amendments that are now proposed to the 1 April 2018 Scheme are highlighted in yellow. A yellow highlight in the list of contents at the beginning of the document signposts that the provision is proposed to be amended. Where the proposed amendment represents a material change the provision the title of the paragraph and the change itself are highlighted in yellow. Where the adjustment is only technical or only for the purposes of clarity only the change itself is highlighted in yellow. However, the changes are also set out below.
- 1.3.3 The following Scheme provisions are proposed to be materially amended i.e. they add to or amend the requirements placed on schools, or advice to schools, in their financial management:
- 1.3.3.1 Provision 2.1.6: The value limit of debt write off is clarified to be £500 and the provision set in the Financial Regulations for Maintained Schools for the authorisation of the write off of a value greater than £500, by the Council's Chief Financial Officer, has been transferred into the Scheme.
- 1.3.3.2 Provisions 2.11 and 8.3: The Authority proposes to clarify that the notice period that schools should give in ceasing contracts or SLAs with the Authority should be 3 months where the contract does not specify. The date of 31 March for the establishment of SLAs for the next financial year / 31 August for the next academic year has also been clarified within the Scheme.
- 1.3.3.3 Provision 2.12: The Authority proposes an amendment to directly replicate the DfE's template to state that balances remaining from central earmarked funds specifically allocated to the school by the Authority *will* be recovered from schools rather than *may* be recovered.
- 1.3.3.4 Provision 3.5.1: The requirement for schools to have between 3 and 5 bank signatories has been copied across from the Guide to Financial Procedures to the Scheme, for the purposes of clarity. The Authority proposes to be clearer in the Scheme that only employees either of the school or the Authority can be bank signatories. Governors, for example, that are not employees of the school or the Authority cannot be bank signatories.
- 1.3.3.5 Provision 4.10: The reference specifically to capital loans for solar panels has been removed. Although loans from the Authority for solar panels are still permitted, the Authority would now expect schools to use the Salix route.
- 1.3.3.6 Provision 10.4: A paragraph has been added to clarify the restrictions on the advice that the Authority's Legal Team can provide to schools, where there would be a conflict of interest, and on issues related to exclusions, admissions and SEND. This provision is proposed to be added into the Scheme following growing numbers of requests from schools for advice that the Legal Team are not in a position to provide.
- 1.3.4 The following provisions are proposed to be amended. However, these do not materially alter the requirements placed on schools, or the advice to schools:
- 1.3.4.1 Provision 1.2: This provision now references the separate Schools Contract Standing Orders document (as do provisions 2.1.1, 2.1.3, 2.4 and 2.10). Provision 1.2 has been amended also to add clearer signposting of additional existing governing protocols and the Financial Regulations for Maintained Schools, providing hyperlinks to webpages on Bradford Schools Online.
- 1.3.4.2 Provision 2.10: The provision in the current Scheme sets out a number of bullet points on contracting and purchasing requirements that are lifted directly from the DfE's Scheme template. On review, and responding to the feedback that these bullet points cause confusion, it is proposed to remove them. This in itself does not materially alter the requirements on schools or advice to schools; the bullet points set out only what the DfE says the Scheme cannot do in terms of placing requirements on schools. As our SCSOs (appendix 2) comply already, it is not necessary to state these 'do not's' within

our Scheme and it is expected that this will help clarify the procurement requirements placed on schools.

1.3.4.3 Provision 4.9: The Scheme now has clearer signposting of the Authority's existing governing protocol for the management of deficit budgets and clarification (written into this protocol already) that deficits can only be authorised by the Council's Chief Financial Officer or his / her representative.