

## Schools Forum Document HW Appendix 1

### CONSULTATION & INFORMATION ON PRIMARY & SECONDARY FUNDING FORMULA 2018/19 FINANCIAL YEAR

#### 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 (pre-16) schools and academies in Bradford for the 2018/19 financial year (the "funding formula"). For those who may not wish to read the full detail of this document, an extended summary of the proposals is given in paragraph 2.
- 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.

1.2 This document also asks for feedback, for consideration by Bradford's Schools Forum, on the continuation for the 2018/19 financial year of funds de-delegated from maintained primary and secondary schools.

1.3 The deadline for responses to this consultation is **Monday 4 December 2017**. An analysis of responses received will be discussed at the Schools Forum meeting on 6 December. Please address all questions and responses to Andrew Redding 01274 432678 [andrew.redding@bradford.gov.uk](mailto:andrew.redding@bradford.gov.uk). A response form is included at Appendix 4.

1.4 Two simple 'roadshow' events have been arranged to give colleagues the opportunity to listen to the proposals and to ask questions and give feedback directly. Please email [andrew.redding@bradford.gov.uk](mailto:andrew.redding@bradford.gov.uk) to book onto one of the following events (**note these dates are still to be confirmed**):

- Monday 13 November, 1:30pm – 3:30pm, Margaret McMillan Towers
- Thursday 23 November, 1:30pm – 3:30pm, Margaret McMillan Towers

1.5 Please note that separate consultation documents, on Early Years and High Needs Block funding for 2018/19, are published on Bradford Schools Online. These consultations can be accessed [here](#).

1.6 The message "DO NOT PANIC" has been communicated in our consultations in recent years. This remains an important message in this year's primary and secondary mainstream funding consultation. The Minimum Funding Guarantee (MFG) will continue to protect schools and academies against sharp reductions in per pupil funding due to formula or data changes. The level of MFG provided is one of the 6 key decisions that must be made for 2018/19, summarised in paragraph 2.

1.7 However, we are entering a period of change, the most significant being the establishment of a National Funding Formula (NFF) for the calculation of primary and secondary mainstream budget shares. Following previous rounds of consultation, in March and December 2016, the Government has now announced the final construction of the NFF, which will be implemented in its 'hard' form from April 2020, notwithstanding that the Government has indicated that there are aspects of this NFF that will continue to be reviewed prior to April 2020. This means that the Local Authority will retain operational responsibility for the funding formula in Bradford for 2018/19 and 2019/20. At April 2020, this responsibility will pass to the Government through NFF. The Government's announcements and modelling can be accessed [here](#). A briefing note of the impact of the final NFF can be viewed within the reports presented to the Schools Forum on 18 October [here](#). A summary is given later in this document.

1.8 In early 2017, alongside 2017/18 financial year budget information, the Authority provided schools and academies with an explanation of the impact of NFF as was then proposed in the December 2016

consultation round, as well as a [ready reckoner](#) for schools and academies to see the possible impact. This information has been superseded by the most recent announcement.

1.9 The transition to NFF featured strongly in Bradford Schools Forum's deliberations and decision making on the allocation of the 2017/18 Dedicated Schools Grant. The key decisions that were made in 2017/18 were:

- The continuation of our current funding formula, not adjusting any formula factor out of line with the direction of travel towards NFF.
- Continuation of the MFG set nationally at minus 1.5% i.e. per pupil funding for individual schools and academies could not reduce by more than 1.5%.
- The transfer of £5.7m from the Schools Block to the High Needs Block. As a result of this, the vast majority of schools and academies are funded at the MFG level in 2017/18.
- The establishment of clearer criteria for the allocation of Growth Funding to the secondary phase.
- The cessation of a number de-delegated funds for the maintained secondary sector, including the maternity / paternity insurance scheme.

## 2. Summary of Formula Funding Proposals for 2018/19

2.1 **There are 6 key decisions** to take regarding Bradford's 2018/19 mainstream primary and secondary funding formula arrangements. These are:

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

2.2 Depending on what is decided, there are knock on consequences that must be thought through:

- NFF will affect our definition, and the values, of 'notional SEN' within primary and secondary formula allocations.
- NFF will also affect the values of SEN Floor allocations received by previously eligible schools and academies. The SEN Floor is funded from the High Needs Block but references formula funding allocations within the Schools Block.
- The scope of NFF does not yet cover all factors. There are currently no NFF solutions for the allocation of funding for the following:

- Pupil Mobility
- Business rates
- Split sites
- PFI (Building Schools For the Future)
- Growth Funding

2.3 Against the 6 key decisions then, in summary, the Authority proposes the following. Within these proposals, we refer to 'subject to final affordability'. The modelling using the existing October 2016 Census dataset indicates that the starting proposals listed below are fully affordable. However, the cost of formula funding in 2018/19 will change once the October 2017 Census dataset is used e.g. FSM% go up and down, prior attainment scores change. We cannot currently accurately predict 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 and we also must ensure that schools are aware of the discussion and decision making processes that will take place should the starting proposals not be affordable within the 2018/19 envelope. We rely on the on-going communication between schools and academies and their representatives on the Schools Forum.

#### Decision 1 – Whether to move to NFF at April 2018

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

**Question 1: Do you agree with the proposal to 'move to National Funding Formula' at April 2018? If not, please explain why not.**

**Question 2: Do you agree with earmarking Schools Block funding on a phase-specific basis? If not, please explain why not.**

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

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

**Question 3: Do you agree with the proposal to set the Minimum Funding Guarantee at 0% in 2018/19, subject to final affordability? If not, please explain why not.**

Decision 3 – The value Ceiling in 2018/19

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

**Question 4: Do you agree with the proposal to set the Ceiling at + 3% per pupil in 2018/19, subject to final affordability? If not, please explain why not.**

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

- **The Authority proposes to fully implement the £3,500 (primary), £4,800 (secondary) and £4,042 (all-through) minimums for eligible schools, where this is affordable.** Where this is not affordable i.e. this cannot be afforded within the phase without adjustment elsewhere e.g. in the value of the MFG, the Authority will discuss this with the Schools Forum and will ask the Forum to make a recommendation on this matter in January 2018. This may mean movement to the full minimums may be scaled back in 2018/19. Please note that the Government has only funded at DSG level the minimums up to a transitional value in 2018/19. Therefore, full implementation of the minimums in 2018/19 will cost more than the DfE has specifically funded.
- Please note that the calculation of these minimums under the NFF is different from the calculation permitted locally by the 2018/19 Regulations. Therefore, we cannot completely replicate how this factor works under local conditions. However, we are permitted to apply to the Secretary of State to adjust the calculation in specific circumstances. We propose to submit a request to the Secretary of State to exclude both the BSF factor and business rates from the calculation of these minimums.

**Question 5: Do you agree with the proposal to seek to fully implement the DfE's minimum per pupil funding floors in 2018/19, subject to final affordability? If not, please explain why not.**

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

- Under both Bradford's current formula and NFF, the vast majority of primary schools and academies are funded on the MFG. Under 2018/19 Regulations, the best formula funding settlement that can be provided for these schools from the Schools Block is 0% (same allocation in 2018/19 as 2017/18 where pupil numbers are the same). This means that, for the primary phase, there is the potential, subject to the cost of formula funding using the October 2017 Census dataset, for there to be money unallocated within the Schools Block allocation, because the DfE has allocated 0.5% per pupil into the Schools Block in respect of these schools. The position of the secondary phase is somewhat different, as 2/3rds of schools and academies are above the MFG.
- Modelling strongly indicates that it will be very difficult to allocate these monies by adjusting formulae, so that the result is that a large number of primary schools are lifted off the MFG, whilst also keeping to the key proposal of moving to NFF and without distorting our formula approach.
- Initial feedback from primary representatives on the Schools Forum is that **primary schools and academies would welcome the earmarking of any unallocated monies in support of SEND cost pressures in schools that have lower levels of formula funding in relation to their proportion of children with EHCPs.** The Schools Forum has asked the Authority to look at the options for the further development of the SEN Floor mechanism, which does already target additional High Needs

Block funding to low AEN high EHCP schools and academies. This proposal will be developed further over the autumn term. It would only be a temporary, possibly one off, arrangement. To go ahead, this will require specific agreement by the Schools Forum for the transfer of Schools Block monies to the High Needs Block. However, to be clear, this transfer will be to enable additional spending in support of SEND in the primary phase, not to act as a contribution to general cost pressures within the High Needs Block.

**Question 6: Do you agree with the proposal, currently in outline, to earmark unallocated primary phase Schools Block monies to support SEND costs in primary schools and academies (by enhancing the SEN Floor), understanding that this will require the transfer of these monies to the High Needs Block? If not, please explain why not.**

#### Decision 6 – High Needs Block and Schools Block Headroom

- Bradford gains from the new High Needs Block (HNB) NFF formula, by £7.5m over 5 years, assuming the continuation of capping after 2019/20. The NFF result is still heavily damped, with only 50% of the national HNB budget allocated on the basis of the new formula. 50% will be allocated on the basis of 2017/18 spending levels. Bradford’s gain if the HNB was allocated fully on formula would be £15m vs. the £7.5m we are likely to receive. The DfE does not indicate for how long 50% of the HNB will be based on historic spending.
- In this context, recognising the growth in SEND in Bradford (for example, the c. £1m annual growth in the cost of mainstream EHCPs, which if continuing would consume in itself £5m of the £7.5m 5 year increase), the financial position of the High Needs Block is incredibly challenging. Alongside the NFF, the position of the HNB, and review activity and consultation, will dominate the Schools Forum’s discussions in the lead up to final decision making on the 2018/19 DSG allocation.
- It is important that readers of this consultation document understand this position. The Authority recognises the significant contribution that the Schools Block made to high needs provision in 2017/18. **We will engage with and take a clear steer from the Schools Forum on the views of school colleagues about how to continue to manage high needs provision and pressures without the context of a whole-school system wide financially challenging environment.** Under 2018/19 Regulations, authorities are permitted to transfer up to 0.5% of the Schools Block to the High Needs Block with the agreement of the Schools Forum following consultation with schools. 0.5% of our Schools Block is c. £2m. The possible transfer of Schools Block monies to the High Needs Block to effect decision 5 for the primary phase would be counted within the 0.5%.

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

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

#### Notional SEN

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

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

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

**Question 8: Do you agree with the proposal to continue with our current definition of notional SEN where we move to National Funding Formula? If not, please explain why not.**

#### SEN Floor

- The increase in the funding of low prior attainment under NFF will have a knock on consequence on the SEN Floor as the eligibility for the SEN Floor will significantly decrease. This will be the case even though a number of schools will not see any more funding in 2018/19 in total than they did in 2017/18.
- Our current SEN Floor provides a 'top up' where the SEN formula does not allocate a minimum level of funding, after the cost of EHCPs has been removed. This is re-calculated on a monthly basis for changes in EHCP positions. SEN formula funding is defined as the notional SEN in the table above but does not include 5.5% (primary) / 4.5% (secondary) of the Base £APP element. The floor tops up funding to these minimums:
  - For Primary schools and academies: £19,931 or £69.10 per pupil (whichever is greater)
  - For Secondary schools and academies £75,337 or £69.10 per pupil (whichever is greater)
- **The Authority's basic proposal is that we protect the values of SEN Floor allocations for individual schools and academies in 2018/19 that would otherwise be reduced. We propose that we ensure that schools and academies that are currently funded under the SEN Floor receive in 2018/19 at least the value of allocation they have received in 2017/18, pending further review for 2019/20.**
- Please be aware, under decision 5, that the Schools Forum is currently considering whether further support for SEND can be provided for primary schools and academies through the Floor mechanism in 2018/19, on a temporary possibly one off basis, by using primary phase headroom within the Schools Block.

**Question 9: Do you agree with the proposal to protect SEN Floor allocations for individual schools and academies in 2018/19 at least at their 2017/18 values? If not, please explain why not.**

#### Factors Outside NFF Scope in 2018/19

- **We propose to continue our current 2017/18 formulae for the allocation of both split sites and pupil mobility.** These factors will be updated for October 2017 Census data. The values of the formula factors will be the same.
- **Business rates will continue to be funded at actual cost.**

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

**Question 10: Do you agree with the proposal to continue the approaches to the factors currently outside the scope of the National Funding Formula as set out (split sites, pupil mobility, business rates, Growth Funding, BSF DSG affordability gap)? If not, please explain why not.**

### 3. More detail about National Funding Formula & the proposal to use this from April 2018

3.1 Our Dedicated Schools Grant (DSG) position, under a fully implemented National Funding Formula, changes as follows when compared against Bradford's 2017/18 baseline.

a) Schools Block	a gain of £6.5m on a baseline of £406.79m (+1.6%)
b) High Needs Block	a gain of £7.5m on a baseline of £63.84m (+11.8%)
c) Central Schools Block	a gain of £0.5m on a baseline of £2.33m (+21.7%)
<b>Total</b>	<b>a gain of £14.5m on a baseline of £472.96m (+3.1%)</b>

3.2 The notable differences, when the final National Funding Formula (NFF) is compared against that which was proposed by the DfE in its 2nd stage of consultation in December 2016, relating to the Schools Block:

- The 'hard' NFF will not be implemented until April 2020.
- The negative 3% per pupil 'floor' for primary and secondary schools (the level losses would be capped at and would not exceed for individual schools) has been replaced by a positive 0.5% floor in 2018/19 and positive 1% in 2019/20, meaning that the NFF, at DSG level, does allow for funding growth for all schools of 0.5% in each of the next 2 financial years. This is the main positive change vs. the December consultation proposals, and it means that Bradford now gains rather than loses in the Schools Block. However, this does not mean that all schools will see a minimum 0.5% increase in their funding levels. Schools that are funded on the Minimum Funding Guarantee at best in 2018/19 will see a cash flat (0%) settlement.
- There are new total per pupil funding minimums, which are designed especially to give schools with lower rates of formula funding (due to lower measures of AEN and deprivation) an improved minimum baseline.
- The final NFF has increased the values of basic per pupil funding for primary (+ £35) and secondary schools (+£66 KS3; + £74 KS4) vs. that proposed in December 2016.

3.3 In most other respects, the final NFF announced by DfE, is the same or similar, or has the same or similar impact, as the NFF that was proposed back in December 2016. This means:

- There is the same retained focus on additional educational needs and deprivation funding, with this especially being focused on low prior attainment. The NFF allocates more (+£17.8m) for AEN in total than Bradford's current formula.
- A pupil mobility factor within the primary and secondary formula is confirmed.
- There is the same reduction in the value of lump sum funding, with the NFF value set at £110,000 per school, which is £65,000 lower than Bradford's current formula. This means that the unprotected NFF

allocations for the vast majority of our primary schools and academies are reduced on Bradford's current formula allocation.

- The vast majority of our primary schools and academies are funded at their Minimum Funding Guarantee (MFG) level and therefore, the values of their allocations are dependent on the level at which the MFG is set. Current estimates indicate that 80% of primary schools / 33% of secondary schools will be on the MFG, if the NFF is implemented by us in 2018/19 with an MFG of 0%, with the total value of this protection being £7.37m (£6.46m of this to the primary sector). The funding of our primary sector, in particular, therefore, is vulnerable if Government policy in the future moves further towards the full NFF outcome by reducing the value of MFG protection. The Government has stated that no school will lose as a result of NFF. However, future governments may change from this policy.
- Bradford's secondary sector fares much better under NFF, with 2/3rds of secondary schools and academies gaining. This is due in particular to the £4,800 minimum but also the significant new focus on the funding of low prior attainment.
- The NFF still does not fully compensate for the growth in costs (especially salaries costs) and therefore, there will still be further erosion in the value of formula funding in real terms. For clarity, this is not a technical formula issue. It is an issue that is arising as a result of the quantum of education funding falling behind as costs (of salaries and services) increase.

3.4 The extract below gives a more detailed analysis of the differences in formula factor values in the NFF compared against Bradford's 2017/18 formula. This highlights how differences in allocations for individual schools are generated.

Variable	2017/18 Bfd values		NFF Values Difference	
	Primary	Secondary	Primary	Secondary
Base APP (Reception / Key Stage 3)	£2,796.67	£4,019.66	-£49.00	-£155.72
Base APP KS4		£4,256.79		£130.28
Lump Sum	£175,000	£175,000	-£65,000	-£65,000
Deprivation - FSM Ever 6	£1,023.09	£927.71	-£482.96	-£142.52
Deprivation - FSM Flat			£440.11	£440.11
Deprivation IDACI F	£324.96	£426.54	-£124.91	-£136.47
Deprivation IDACI E	£406.20	£533.18	-£166.14	-£143.08
Deprivation IDACI D	£487.44	£639.81	-£127.35	-£124.69
Deprivation IDACI C	£568.68	£746.45	-£178.58	-£186.31
Deprivation IDACI B	£731.16	£959.72	-£311.06	-£359.57
Deprivation IDACI A	£893.64	£1,172.99	-£318.50	-£362.79
English as an Additional Language	£197.99	£1,192.48	£317.13	£192.85
Low Prior Attainment	£241.31	£494.40	£808.95	£1,055.97

3.5 More detailed analysis of the overall impact of NFF is provided within the Schools Forum reports for 18 October meeting [here](#).

3.6 Pupil Premium is expected to continue on a cash flat basis as a separate grant. However, the DfE has confirmed that the rate of funding for Pupil Premium Plus, for Children Looked After, will increase in 2018/19 from £1,900 to £2,300. Final rates for 2018/19 are still to be published.

3.7 The table below sets out what 'move to NFF' (decision 1) means for individual formulae factors. It compares our current formula, used in 2017/18, with the NFF variable value and also indicates where the use of the factor would alter e.g. a change in the IDACI band weighting. Please note that the NFF values include an Area Cost Adjustment (ACA) of 1.00016 (the ACA is not included in the values difference analysis in the table above).

Factor	Current £	NFF £	Additional Explanation / Change
Primary – Base £APP	£2,796.67	£2,747.44	The reception uplift factor will cease.
Secondary – Key Stage 3 Base £APP	£4,019.66	£3,863.62	
Secondary – Key Stage 4 Base £APP	£4,256.79	£4,386.70	



Lump Sum – Primary & Secondary	£175,000	£110,017	
Primary - Deprivation – FSM Ever 6	£1,023.09	£540.09	
Primary - Deprivation – Flat FSM	n/a	£440.07	This is a new factor not previously used.
Secondary - Deprivation – FSM Ever 6	£927.71	£785.13	
Secondary - Deprivation – Flat FSM	n/a	£440.07	This is a new factor not previously used.
Primary - Deprivation – IDACI F	£324.96	£200.03	The bands (weightings) are adjusted.
Primary - Deprivation – IDACI E	£406.20	£240.04	The bands (weightings) are adjusted.
Primary - Deprivation – IDACI D	£487.44	£360.06	The bands (weightings) are adjusted.
Primary - Deprivation – IDACI C	£568.68	£390.06	The bands (weightings) are adjusted.
Primary - Deprivation – IDACI B	£731.16	£420.07	The bands (weightings) are adjusted.
Primary - Deprivation – IDACI A	£893.64	£575.09	The bands (weightings) are adjusted.
Secondary - Deprivation – IDACI F	£426.54	£290.05	The bands (weightings) are adjusted.
Secondary - Deprivation – IDACI E	£533.18	£390.06	The bands (weightings) are adjusted.
Secondary - Deprivation – IDACI D	£639.81	£515.08	The bands (weightings) are adjusted.
Secondary - Deprivation – IDACI C	£746.45	£560.09	The bands (weightings) are adjusted.
Secondary - Deprivation – IDACI B	£959.72	£600.10	The bands (weightings) are adjusted.
Secondary - Deprivation – IDACI A	£1,172.99	£810.13	The bands (weightings) are adjusted.
Primary - English as an Additional Language (3)	£197.99	£515.08	There is no change in the data source – this is still EAL3.
Secondary - English as an Additional Language (3)	£1,192.48	£1,385.22	There is no change in the data source – this is still EAL3.
Primary – Low Prior Attainment *	£241.31	£1,050.17	To implement NFF we will need to move from the <73 data measure to <78 and also remove the reduction weighting for children tested under the old EYFSP.
Secondary – Low Prior Attainment *	£494.40	£1,550.25	The DfE is to provide a new weighting for current year 7 pupils. This weighting will be provided in December. The 2017/18 year 7 weighting will carry forward for year 8 pupils.
Primary – Minimum £APP *	£0	£3,500	This is a new factor. We currently anticipate implementation of a maximum value of £3,500 in 18/19. Will need an EFA disapplication request to exclude business rates.
Secondary – Minimum £APP *	£0	£4,800	This is a new factor. We currently anticipate implementation of a maximum value of £4,800 in 18/19. Will need an EFA disapplication request to exclude business rates and BSF.
Primary - Pupil Mobility	£1,608.19	£1,608.19	There is no NFF solution. Our current formula will continue.
Secondary – Pupil Mobility	£1,915.87	£1,915.87	There is no NFF solution. Our current formula will continue.
Primary & Secondary – Business Rates	n/a	n/a	Continue to be funded at actual cost.
Primary & Secondary – Split Sites	n/a	n/a	There is no NFF solution. Our current formula will continue.
Secondary – PFI (BSF)	n/a	n/a	Continue current methodology, but adjusting the allocation for academies to correct the EFA's re-profiling of allocations on an academic year basis.

Minimum Funding Guarantee	n/a	n/a	Will be set between 0% and minus 1.5%
Ceiling	n/a	n/a	Will be set as a cap (not scaling) as now proposed at 3%
Notional SEN	n/a	n/a	The NFF will increase notional SEN values due to the additional targeting of low prior attainment i.e. a greater proportion of school's budget will be calculated to be available for SEN / AEN.
SEN Funding Floor	n/a	n/a	Due to the significant increase in low prior attainment funding, most schools will no longer receive SEN Floor funding. This is especially impactful on the primary phase. It is proposed, as a minimum, that we add a protection to ensure that schools receive at least their 2017/18 cash value of SEN Floor, pending review and further discussion.

\* *The Regulations for 2018/19 will not quite enable full replication of NFF as published on 14 September 2018/19.*

3.8 Just to reiterate, within our proposals, we refer to 'subject to final affordability'. The modelling using the existing October 2016 Census dataset indicates that the starting proposals are affordable. However, the cost of formula funding in 2018/19 will change once the October 2017 Census dataset is used e.g. FSM% go up and down, prior attainment scores change. We cannot currently accurately predict 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 and we also must ensure that schools are aware of the discussion and decision making processes that will take place should the starting proposals not be affordable within the 2018/19 envelope. We rely on the on-going communication between schools and academies and their representatives on the Schools Forum.

- Where the cost of formula funding for 2018/19 increases due to changes in the October 2017 Census dataset, to the extent that the Schools Block will be overspent if the NFF is fully implemented, the Authority will discuss the options for addressing this with the Schools Forum and will ask the Schools Forum for a recommendation on this matter in January 2018. This may mean that certain aspects of the NFF are scaled back.
- In managing affordability within the Schools Block, the Authority proposes effectively to 'ring fence' primary and secondary monies separately so that any over or under spending, and adjustment to correct this, is considered on a separate phase basis and so that monies are not transferred between the phases where it is possible to avoid this. Please note that the values of MFG and ceiling must be set the same for both phases.

3.9 For reference, 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:

<b>Category</b>	<b>Primary Lump</b>	<b>Primary APP</b>	<b>Secondary Lump</b>	<b>Secondary APP</b>
<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.

3.10 The factor in our secondary funding formula for Private Finance Initiative (PFI) / BSF contracts allocates the DSG's contribution to the affordability gap of the Building Schools for the Future (BSF) programme for applicable 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.*

3.11 For completeness of understanding, the following current aspects of the current formula funding framework remain in place in 2018/19:

- DSG sourced formula funding allocations for primary (reception to year 6) and secondary (pre 16) will be calculated on the October (2017) Census.
- Unlike formula funding, the Pupil Premium Grant is allocated on January 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, prior attainment, English as an additional language, pupil mobility and looked after children factors. We allocated 88.90% of the delegated schools block funding via the pupil-led factors in 2017/18, and the modelling included in this consultation indicates that we continue at least at this % in 2018/19.
- The Minimum Funding Guarantee (MFG) continues to be the only protection mechanism available for individual school and academy allocations.
- The strict restrictions on centrally managed funds continue and no new central commitments are permitted without Secretary of State approval. This continues to ensure maximum delegation of the DSG to schools and academies at the start of the financial year.
- A small number of named 'de-delegated' funds are permitted for maintained schools. The decisions on the holding of 'de-delegated' funds will continue to be made by the Schools Forum annually on a phase by phase basis. Once these decisions are taken, they apply to all schools within each phase. De-delegation is not an option for academies and free schools, but where de-delegation has been agreed for maintained primary and secondary schools, the local authority may offer the service on a buy-back basis to academies and free schools.
- A small number of named centrally managed funds are also still permitted, with these now being transferred into a newly established Central Schools Block. Funding for expanding schools and academies and bulge classes, as well as safeguarded salaries remaining from previous re-organisations, will continue to be funded in year as "contingency" items.
- 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.

- 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.

#### 4. The Case for moving to NFF (decision 1) and the rationale behind proposals for decisions 2, 3 and 4

4.1 The case for moving to National Funding Formula at April 2018 can be summarised as follows:

- The DfE has stated the expectation that authorities will move closer towards NFF over the next 2 years. The Financial Regulations have been adjusted for 2018/19 to mostly enable this. It is likely to be much simpler for schools to understand and predict a full implementation in 1 year vs. a hybrid implementation, where factors continue to move after 2018/19. Notwithstanding that the DfE may review its own NFF before full implementation at April 2020. Enabling schools to be clearer about their income in future years will help their budget planning.
- Since December 2016, the Authority has been talking to schools on the basis that NFF although in its hard form will not come in until April 2019 (now April 2020) will come in for Bradford at April 2018 due to the fact that we are a loser. The Authority has provided forecasts for schools (including within the HCSS Budget Software) and academies for 2018/19 onwards on the basis that NFF will be used to calculate individual budget shares. Schools have planned already on this basis.
- The final NFF is very similar to what was proposed in December 2016 so this means that our initial forecasting has given a good sight of the impact.
- The DfE is allocating more money into our Schools Block. We need a way of allocating this in 2018/19 and 2019/20. Much of this additional money comes from the DfE's implementation of the NFF at DSG level. It feels logical therefore, to 'pass this on' rather than seeking to find a way of allocating this money via our current formula or a hybrid approach. In addition, a number of schools gain from the NFF, including 2/3rds of the secondary sector. If we did not implement NFF at April 2018, the settlements for these schools may be lower (some significantly) than the forecasts we have previously published. The DfE has also published notional allocations for schools under NFF for 2018/19 and has said that authorities have been given the funding to implement these up to a 3% ceiling. Therefore, schools will be able to challenge where NFF would allocate additional monies but where this is not being passed on. In such tight financial times, we would expect schools to challenge where this has happened. The Authority therefore, would need to have a strong rationale for not quickly moving to NFF i.e. the Regulations do not enable this, to do so would mean significant losses for some schools, we would be implementing change at very short notice. Our assessment is that none of these factors are in play. However, as explained, a caveat must currently be given about how the move to NFF must operate within the constraints of affordability and this may require some scaling back of full implementation.
- The NFF significantly focuses additional funding on SEND low prior attainment. Given the pressure that sits within SEND provision, enabling school budgets to find these increases will likely be welcomed by schools.
- Because most primary schools and academies are already on the MFG in this current year, and NFF will reduce their allocations (mostly because of the £65,000 reduction in the value of the lump sum), most will be on the MFG in 2018/19, but irrespective of the formula we use. However, there are pockets of gainers in the primary sector and these gains would not be passed on unless we implemented NFF. For reference, the indicative MFG and Ceiling positions are summarised below:

	<b>Primary (156)</b>	<b>Secondary (33)</b>
Under Current Formula - No. on MFG (at 0%)	143	22
Under NFF – No. of the MFG (at 0%)	125	11
Under Current Formula - No. on Ceiling (at 3%)	2	1
Under NFF - No. on Ceiling (at 3%)	2	3

## 4.2 Key thinking behind proposals for decisions 2, 3 and 4:

- Decision 2 (MFG level): Our modelling previously published for schools was based on the DfE's December 2016 proposal for the continuation of the MFG set at minus 1.5%. Therefore, setting an MFG at 0%, if affordable, will produce a better result for schools than previously published. However, this comes in the context of likely further wider release of the 1% pay cap in 2018/19. The Authority would expect schools to seek a better minimum level of funding from the Authority where this is possible in the light of this.
- Decision 3 (Ceiling): The DfE, in its national DSG settlement for 2018/19, has capped gains for individual schools at + 3% per pupil (before the implementation of the new minimum per pupil floors). It therefore, feels logical to propose a ceiling in Bradford's formula of the same. This is also the ceiling value we used to calculate information for schools in early 2017 so there is consistency.
- Decision 4 (DfE minimum per pupil funding floors): The inclusion of the minimums is an optional factor for 2018/19. However, funding has been specifically allocated into the DSG for these and this funding will target schools that do not receive large sums of AEN funding. Setting the minimums at a lower level e.g. £3,300 and £4,600, on indicative data, actually makes little difference to the allocations of schools and academies that are eligible for the final full £3,500 and £4,800 floors. The Authority's analysis indicates that there is immediate benefit to be had, especially in the primary sector, in moving to the full minimums in 2018/19 where we can afford to do so.

## 5. Consultation Impact Modelling

5.1 In the interests of seeking to illustrate as simply as possible for schools and academies the total impact of the proposals, we have provided a 'single-sheet' analysis. Please see Appendix 1. This analysis updates that published by the Authority in February 2017 on the impact of NFF. This modelling is best viewed on screen rather than printed off.

5.2 The DfE has also provided its own notional NFF impact modelling, which can be found [here](#). The modelling attached with our document more accurately reflects what can be replicated locally for NFF under 2018/19 Regulations. One of the key differences is the variance for schools and academies on the MFG between the notional 0.5% per pupil increase for these schools within the DfE's modelling in 2018/19 and the MFG set at 0% within the Authority's modelling.

5.3 Appendix 1 attached shows the difference between a financial year allocation calculated using our current 2017/18 funding formula and that calculated using National Funding Formula (to the extent that we can replicate this under 2018/19 Regulations). Both are calculated under the same parameters:

- Using October 2016 pupil numbers, adjusted in some schools for a) the cessation of the reception uplift in the primary sector under NFF, b) the transfer of resourced provision pupil back into main formula funding and c) additional growth for newly establishing schools.
- Using October 2016 data i.e. the data (such as FSM, EAL, IDACI) that was used to calculate 2017/18 financial year allocations.
- On a 0% Minimum Funding Guarantee.
- On a + 3% Ceiling.

5.4 The National Funding Formula indicative total assumes that the NFF, as set out earlier in this document, can be afforded in full and the DfE's per pupil minimum floors can also be afforded in full at £3,500, £4,800 or £4,042. It also assumes that our disapplication requests referred to in the document will be accepted by the Secretary of State.

5.5 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.

**5.6 We must very clearly state that this modelling is published only for the purposes of enabling schools and academies to understand how the change to NFF, under the parameters set out, will affect their financial year formula funding so that they are able to form a view and respond to this consultation. The modelling does not constitute indicative or final budgets for 2018/19.** The modelling makes no reference to:

- Changes in the number of pupils in schools that will be recorded in the October 2017 Census that will feed into 2018/19 allocations.
- Change in data e.g. FSM% and prior attainment that will be sourced from the October 2017 Census data that will feed into 2018/19 allocations.
- Any adjustment that might be required for the purposes of balancing the Schools Block / the DSG in 2018/19.

5.7 A column by column key is included in Appendix 1.

5.8 As the level of Minimum Funding Guarantee is such an important decision in 2018/19 we have provided an additional model, Appendix 2, which shows the difference in the NFF- based allocation between a 0% and a minus 1.5% MFG. This will also allow schools to see the improvement in their formula funding result vs. the early 2017 ready reckoner modelling when it was expected that the MFG would be set at minus 1.5% in 2018/19.

5.9 Schools and academies are advised to look at the information in Appendix 1 and to compare this with the ready reckoner that was published early in 2017 to identify any difference in the impact of the final NFF vs. what has been previously set out and what is likely to have formed the basis of the school's current 3-5 year budget planning. Apart from some smaller differences, due to the increase in base per pupil funding and a minor tweak in IDACI band c, the main reasons for differences between Appendix 1 and the ready reckoner are:

- That the MFG is set at 0% in Appendix 1 whereas this was set at minus 1.5% within the ready reckoner.
- For a smaller number of schools, the impact of the new minimum per pupil funding floor that was not within the DfE's proposals in December 2016 and was not within the ready reckoner model.
- That the low prior attainment funding in the ready reckoner was still based on October 2015 data whereas Appendix 1 figures are now based on October 2016.

5.10 Schools and academies are then advised to identify in Appendix 1 whether, under NFF, they are funded on or above the MFG and the value of MFG if applicable. If you are funded on the MFG, please then look at Appendix 2, which illustrates the difference in your school's financial year allocation when the NFF is used but when the MFG is set at minus 1.5% rather than 0%. This gives sight of an illustrative 'worst case scenario' before any changes in pupil numbers between October 2017 and October 2016 are factored in and is important in your response to decision 2.

**5.11 The Authority is conscious that schools will wish to understand how the proposals set out in this document may affect their actual 2018/19 allocations and what the figure may be when based on October 2017 Census data. We intend shortly to provide an updated ready reckoner, which will allow schools to input their data to assess the possible implications for their actual 2018/19 funding.**

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

## **6. Maintained Schools – 2018/19 De-Delegated Funds**

6.1 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 schools and academies at the start of each financial year. The Regulations do allow funding for

certain types of expenditure to be 'de-delegated', or passed back, from maintained school budgets to be managed centrally. This only applies to maintained schools (not academies or free schools) and the Schools Forum must agree to de-delegate on a phase specific basis, so Forum members representing primary and secondary maintained schools must decide separately for each phase whether the service should be funded centrally by 'topslice'.

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

- take advantage of the economies of scale brought about by central management and bulk purchase e.g. Fischer Family Trust subscriptions
- 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 costs

6.3 Decisions made to de-delegate must be taken annually and new decisions are required for de-delegation in 2018/19. The Schools Forum will further discuss the position of de-delegated funds over the autumn term and this document asks for your feedback so this can be considered. This consultation asks for views only on whether funds should continue to be de-delegated for the purposes listed below. Please be aware that the values of these funds, where de-delegation continues, will be considered further by the Schools Forum in the autumn term. We would expect the values of funds to match anticipated cost pressures and to reduce from 2017/18 for the impact of maintained schools converting to academy status

6.4 Maintained schools are reminded that:

- Representatives of maintained secondary schools agreed in the 2017/18 DSG round to the cessation of de-delegation for the Maternity / Paternity 'insurance' scheme, Fischer Family Trust, Exceptional Circumstances and School Staff Public Duties and Suspensions from the secondary phase. It is anticipated / assumed that the Forum will not wish to revisit this decision i.e. will not wish to begin de-delegation again for 2018/19 for these purposes.
- Within the SEND review and consultation, the ESD School Support Team is proposed to amalgamate into the Authority's single traded support offer for specialist teaching services. As such, subject to the outcomes of the consultation, separate de-delegation may cease. Maintained schools will have the choice to buy into these services directly.

6.5 The following 'de-delegated' funds are held in this financial year:

- ESD School Support Team (primary only)
- FSM Eligibility Assessments (primary and secondary)
- Fischer Family Trust – School Licences (primary only)
- School Maternity / Paternity 'insurance' (primary only for the full year)
- Trade Union Facilities Time (primary & secondary)
- Trade Union Health and Safety Representative Time (primary & secondary)
- School Staff Public Duties and Suspensions Fund (primary only)

Further information on these funds, including values, is given in Appendix 4.

6.6 If funding is not de-delegated for the purposes listed 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.

6.7 For your awareness, the Schools Forum has asked the Authority to further assess the cost of de-delegation for Trade Union Facilities Time.

**Question 11 – Should sums continue or cease to be de-delegated from maintained school budgets in 2018/19 for the purposes listed above? Please explain the reasons why if you believe that these should cease or change.**

## 7. Other DSG Schools Block Centrally Managed Funds

7.1 The Finance Regulations continue to significantly restrict the types of funds that can be held centrally within the DSG. Where funds are held, the Regulations require that the criteria for accessing these are clear and have been agreed with the Schools Forum.

7.2 In 2017/18, the Schools Forum agreed to hold the following permitted funds within the Schools Block:

- A Growth Fund, to support both schools and academies expanding for basic-need purposes at the request of the Local Authority.
- A 'Costs of Re-Organisation' Fund, which allocates funding to match the cost of safeguarded salaries remaining in maintained primary and secondary schools only, where it has been previously agreed that the Local Authority will support the cost. This Fund also will meet the cost of deficits of closing maintained primary schools or maintained primary schools converting to academy status under a sponsored arrangement. This is a de-delegated contingency fund.
- An Exceptional Costs / Schools in Financial Difficult Fund for maintained primary schools only. This is a de-delegated contingency fund.

7.3 These funds support the achievement of the Bradford District's educational priorities as follows:

- 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.
- Support schools that require immediate intervention around standards that may not be able to identify funds from their own budgets.
- Support schools, academies and the Local Authority to manage more effectively the financial pressures brought by places expansion.
- Collectively, help to maintain a stable financial platform for schools and academies across the District, in support of raising standards.

7.4 The proposed arrangements for 2018/19 are shown below and are unchanged from this financial year, with the exception of the amendment of the value of funding allocated by the Growth Fund where the National Funding Formula is used from April 2018. Where this is decided, the NFF base amounts per pupil will be used rather than the values in our current formula.

### Details of these funds in 2017/18 and proposals for 2018/19

#### 7.5 The Ring-Fenced Growth Fund

The total value of the Growth Fund in 2017/18 was £2.614m, broken down between phases and types, as follows:

	Primary	Secondary	Total
Existing Known Expansions	£517,086	£20,694	£537,780
Existing Bulge Classes	£211,580	£0	£211,580
New Expansions	£300,000	£680,000	£980,000
Pre-Opening Costs	£0	£0	£0
Diseconomies of Scale	£60,416	£824,385	£884,801
<b>Total Value 2017/18</b>	<b>£1,089,082</b>	<b>£1,525,079</b>	<b>£2,614,161</b>



The criteria proposed for allocating in 2018/19 growth funding to newly establishing schools and academies are the same as in 2017/18:

- Newly established School / Academy Provision additional support: For basic need purposes, where a new school / academy is established by the Local Authority, or where an existing school / academy extends its provision into a new phase i.e. a Secondary school / academy establishes Primary-aged provision and vice versa, at the request of the Local Authority, and where the new school / academy does not yet have pupils in all planned year groups, the funding approach will be:
  - Pre-Opening support (*this is not applicable to non basic need Free Schools*): the Schools Forum will consider the allocation of a pre-opening budget based on previous methodologies but also taking account of the specific circumstances of the school / academy.
  - Post-Opening support for diseconomies of scale (*this is not applicable to non basic need Free Schools*): the Schools Forum will consider the allocation of a budget based on previous methodologies but also taking account the specific circumstances of the school / academy.
- Newly established School / Academy Provision revenue formula funding: (*this does apply to non basic need Free Schools but only from the 2<sup>nd</sup> year of establishment*): in the first financial year the school / academy will receive a full calculation of formula funding for the number of children planned to be admitted in September, based on estimated data, for the proportion of the year that the school / academy is established (e.g. 7/12ths for a September opening). For technical purposes, this will not be an allocation from the Growth Fund, but a formula funding allocation via the agreed formula – the Local Authority will submit an application to the ESFA to vary pupil numbers on the basis of planned numbers. Any significant difference between estimated and actual intake numbers will be adjusted for retrospectively in the following financial year. In subsequent years, until all year groups are established, the school / academy will be funded on the basis outlined above, providing a full calculation of additional formula funding for the planned additional intake for the following September, with a retrospective adjustment where there are significant differences between estimated and actual intake numbers. *Please note that academy / free school will receive their allocations directly from the ESFA, although these are still funded from the DSG.*

The criteria proposed for allocating growth funding in 2018/19 to already established primary schools and primary academies, that have been asked to increase their admission numbers, are the same as in 2017/18:

- PRIMARY schools / academies permanently expanding by increasing the size of existing year groups:
  - Primary schools and academies are normally asked by the Local Authority to expand by 0.5 FE or 1 FE at any one time. Growth funding is allocated so that the school or academy has the additional funds to establish a new class (or classes). Funding is allocated as follows:
    - For basic need purposes, where an established primary school or academy is permanently expanding by increasing the size of existing year groups, and has already begun to expand before the start of the financial year, the additional allocation will be included within the school's / academy's initial budget. Funding is calculated on the difference between the October 2017 census pupil numbers and a calculation of the composite 5/12 + 7/12 numbers, based on an estimate of the school's October 2018 Census. The school will then be allocated 80% of the value of the base amount per pupil for the difference between the actual and the composite calculation. On indicative 2018/19 NFF-based values this would give £2,198 per pupil.
    - For basic need purposes, where a primary school or primary academy is permanently expanding by increasing the size of existing year groups for the first time in September 2018, the school / academy is allocated 80% of the value of the base amount per pupil for the additional planned intake number, for the applicable proportion of the year (for September expansions this is 7/12ths). On indicative 2018/19 NFF-based values this would give £2,198 per pupil. Funding will be physically allocated in September 2018.
- PRIMARY schools / academies taking a Bulge Class added to existing year groups:
  - Full classes: For basic need purposes, where a primary school or academy is asked in year to admit a full class or Form of Entry (30) into / on top of an existing year group, funding is

allocated on the same basis as for new permanently expanding schools above; at 80% of the base amount per pupil value for the planned additional admission number for the relevant proportion of the financial year. In the following financial year, no additional funding is necessary or allocated; this additional class is automatically funded within the school's / academy's normal revenue budget.

- Half classes: For basic need purposes, where a school / academy is asked in year to admit an additional number of children that do not add up to a full class or Form of Entry into / on top of an existing year group, the additional sum for the current financial year is allocated as for a full class above, based on the actual planned additional intake number. In the following year, and in each year for the lifetime the half class is at the school / academy, an additional sum is allocated based on 80% of the value of the base per pupil amount for the difference between 30 and the actual number of children in the half class. So if the class had 15 pupils the funding would be  $(30 - 15) \times \text{£base app} \times 80\%$ . The value of this funding is reviewed each year, for actual numbers.

The year on year growth in pupil numbers has now reached the secondary phase. The Authority proposes to apply the same general basis of funding to the secondary phase as has been used for the primary phase and the same methodology as used in 2017/18. However, because the numbers involved in expansions may be more fluid in the secondary phase (may not be clear denominations of 30), because secondary schools have larger budgets and curriculum structures, meaning that small increases in numbers may not result in greater cost to the school, and also because the intakes of secondary schools and academies can be / are being adjusted for reasons other than a request by the Local Authority for basic need sufficiency, it has been identified that the criteria for the allocation of growth funding in the secondary phase will benefit from additional clarity.

- SECONDARY schools / academies either permanently or temporarily increasing PAN:
  - We propose that eligibility for growth to secondary schools and academies is assessed on the following principles and criteria:
    - The school or academy must have admitted additional pupils (either via a permanent expansion or a one off bulge class) at the request of the Local Authority to meet basic-need sufficiency and only numbers associated with basic need sufficiency will be eligible for funding.
    - The request for additional places from the Authority has come within the normal admissions round and relates to the school's year 7 intake i.e. pupils admitted at other times in year, admissions to year groups other than year 7, or pupils admitted on appeal or under the Fair Access Protocol, are not funded by the Growth Fund. Consideration of additional funding in these circumstances would be picked up by the exceptional pressures / schools in financial difficulty fund for maintained schools only.
    - Funding in the first year is calculated on actual numbers and allocated only once actual October Census numbers are confirmed (so for additional pupils in September 2018, funding will be calculated and allocated on the basis of the additional costs associated with the actual number of additional pupils recorded in the October 2018 Census).
    - Funding is allocated only after an assessment of the actual cost implications of the additional pupils on the school's budget for the lifetime of the process of expansion e.g. in admitting additional pupils the school evidences that it must incur additional costs in year and that these costs are commensurate with the value of additional funding that would be allocated. This assessment would be carried out at the time of the initial discussion / consultation between the Local Authority and the school or academy, and would take the form of a budget discussion with the headteacher and business manager.
  - Funding for eligible schools and academies would be calculated as follows:
    - Where a secondary school or academy is permanently expanding by increasing the size of its year 7 for the first time in September 2017, the school / academy is allocated 80% of the value of the Key Stage 3 base amount per pupil for the additional planned intake number, for the

applicable proportion of the year (for September expansions this is 7/12ths). On indicative 2018/19 values this would give £3,091 per pupil. Funding will be physically allocated in September 2018.

- o Where an established secondary school or academy is permanently expanding by increasing the size of existing year groups, and has already begun to expand before the start of the financial year, the additional allocation will be included within the school's / academy's initial budget. Funding is calculated on the difference between the October 2016 census pupil numbers and a calculation of the composite 5/12 + 7/12 numbers, based on an estimate of the school's October 2017 Census. The school will then be allocated 80% of the value of the Key Stage 3 base amount per pupil for the difference between the actual and the composite calculation. On indicative 2018/19 values this would give £3,091 per pupil. At the point the school's expansion reaches Key Stage 4, 80% of the Key Stage 4 base £app will be used (which indicatively is £3,509).
- o Where a secondary school or academy has been asked to take a year 7 bulge class (one off temporary PAN increase) of any size, funding is allocated on the same basis as for new permanently expanding schools above; at 80% of the Key Stage 2 base amount per pupil value for the planned additional admission number for the relevant proportion of the financial year. This is a one off allocation. In the following financial year, no additional funding is allocated; this additional class is automatically funded within the school's / academy's normal revenue budget.

**Question 12 - Do you agree with the proposed criteria and methodology for the allocation of the growth funding to schools and academies in 2018/19? If not, please explain the reasons why not.**

**7.6 School Re-Organisation Costs - maintained primary and secondary schools**

The value of this fund in 2017/18 was £0.199m, broken down between phases and types of re-organisation costs, as follows:

	<b>Primary</b>	<b>Secondary</b>	<b>Total</b>
School Staff Safeguarded Salaries	£46,253	£3,071	£49,324
Deficits of Closing Schools	£150,000	n/a	£150,000
<b>Total Value 2017/18</b>	<b>£196,253</b>	<b>£3,071</b>	<b>£199,324</b>

The proposed criteria for allocating funding from this contingency fund in 2018/19 are unchanged from 2017/18:

- School staff safeguarded salaries: funding is allocated, based on the actual cost of agreed safeguards for individual staff in 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 school closes with a deficit budget, or where a maintained school with a deficit budget converts to academy status under a sponsored agreement, the deficit returns to the DSG.

**7.7 Exceptional Costs & Schools in Financial Difficulty - maintained primary schools only**

The purpose of this fund is to provide support for the budgets of maintained primary schools only 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 in schools e.g. costs 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 additional unexpected costs

The value of this fund in 2017/18 was £0.10m, broken down between phases, as follows:

	Primary	Secondary	Total
<b>Total Value 2017/18</b>	<b>£100,000</b>	<b>n/a</b>	<b>£100,000</b>

The proposed criteria for allocating funding for exceptional pupil numbers growth (the most common call on this fund) in 2018/19 are unchanged from 2017/18 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 the 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 4?)
- Whether the school has received financial support or funding from elsewhere

**Question 13 - Do you agree with the centrally managed funds, and their criteria, that are proposed to be held in the DSG in 2018/19? If not, please explain the reasons why not.**

## 8. Consultation Responses

8.1 Please use the responses form in Appendix 4 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 **Monday 4 December 2017**. 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 2018/19, 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 2018/19 will take place in the Schools Forum between now and January 2018. 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 2018/19 arrangements on Wednesday 10 January 2018.

## **10. Appendices**

Appendix 1 – Single Sheet Illustrative Formula Impact Modelling (separate Excel file)

Appendix 2 – The difference between a 0% and minus 1.5% Minimum Funding Guarantee (separate Excel file)

Appendix 3 – Information on De-Delegated Funds (attached within this document)

Appendix 4 – Consultation Responses Form (attached within this document)



## **Appendix 3: Purpose of Each De-Delegated Fund Retained in 2017/18**

### **1. ESBD School Support Team (Primary Schools only):**

As a specialist teaching support service, the ESBD Service provides:

- Experienced teaching and Inclusion Mentor staff, who offer practical support, advice and strategies to Primary school colleagues, in meeting the needs of pupils presenting with the most challenging behaviours
- Support to schools to develop their understanding of social and emotional behaviour, and the management of pupils experiencing difficulties. Wherever possible advice is given on the development of systems and skills that increase the capacity of the school to respond to issues in the future
- Peripatetic Inclusion Mentors, who work under the direction of specialist teachers to offer intensive, time-limited, focused support and training for staff dealing with ESBD
- A range of bespoke training

Within the SEND review and consultation, the ESBD School Support Team is proposed to amalgamate into the Authority's single traded support offer for specialist teaching services. As such, subject to the outcomes of the consultation, separate de-delegation is may cease. Maintained schools will have the choice to buy into these services directly. Primary schools that choose not to buy in will need to replace these services from their own resources, for example, by directly employing specialist staff, or by purchasing other services, on an individual basis or as a cluster of schools.

### **2. 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 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 2018/19, schools will either need to undertake FSM assessment themselves or purchase services. The Local Authority offers a traded service.

### **3. Fischer Family Trust – School Licences:**

This fund pays for 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 2018/19, maintained schools will need to purchase their own licences to access FFT data, on an individual basis or as a cluster of schools.

#### **4. School Maternity / Paternity ‘insurance’ (Primary and Nursery Schools only):**

This fund has historically acted as an ‘insurance’ pot, where 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. De-delegation will not take place during 2018/19.

If this de-delegated fund is not held in 2018/19, maintained primary and nursery 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.

#### **5. Trade Union 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, the 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 membership. 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 are:

- 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 2018/19, individual 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.

#### **6. Trade Union Health and Safety Facilities Time:**

In order to comply with the letter and the spirit of the Health and Safety Regulations, the Council and the Trade Union Health and Safety Lay Representatives in Bradford made a Health and Safety Agreement in 1989. The amount of time funded by the DSG based was significantly reduced by the Schools Forum at April 2015, following review with the Unions. Nominated accredited Trade Union and lay Health and Safety representatives continue to carry out Health and Safety inspections in schools and are released for all or part of their time from their school responsibilities to carry out these duties. A number of days per year are allocated for the Safety Representatives to carry out inspections and this includes appropriate training. In addition, the Safety Representatives carry out site management visits in relation to building work and work with the Council’s Health and Well Being Team on occupational matters, such as stress and undertake the role of investigating accidents, disease and other medical matters. There is a trade union Health and Safety web-site, which is password protected but shared with the relevant Council Safety Officers. A total of 7 days per week (1.4 FTE) of facilities time is currently funded by the DSG.



If this de-delegated fund is not held in 2018/19, individual schools will need to consider how they will meet their employer statutory obligations around health and safety.

## 7. 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 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. Payments are authorised by the Strategic Director, Children's Services.

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

If this de-delegated fund is not held in 2018/19, maintained primary and nursery schools will not be reimbursed for the salary cost of staff and would have to make alternative arrangements to manage this cost.

### 2017/18 De-Delegated Funds: Values

The table below shows the total values that were de-delegated from individual school budgets in the current financial year at the DSG planned budget stage. If these funds continue to be de-delegated in 2018/19, we would expect the values of funds to match anticipated cost pressures, and to reduce from the 2017/18 values shown below for the impact of maintained schools converting to academy status.

<b>Fund</b>	<b>Early Years £</b>	<b>Primary £</b>	<b>Secondary £</b>	<b>Total Value £</b>
ESBD School Support Team	£0	£348,527	£0	<b>£348,527</b>
FSM Eligibility Assessments	£0	£65,689	£14,250	<b>£79,939</b>
Fischer Family Trust – School Licences *	£0	£33,560	£0	<b>£33,560</b>
School Maternity / Paternity 'insurance' *	£133,065	£1,400,397	£305,027	<b>£1,838,489</b>
Trade Union Facilities Time	£16,600	£174,705	£38,053	<b>£229,358</b>
Trade Union Health and Safety Rep Time	£2,537	£26,697	£5,815	<b>£35,049</b>
School Staff Public Duties & Suspensions Fund *	£3,413	£36,627	£0	<b>£40,040</b>
<b>Total</b>	<b>£155,615</b>	<b>£2,086,202</b>	<b>£363,145</b>	<b>£2,604,962</b>

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:

<b>Fund</b>	<b>Early Years £app</b>	<b>Primary £app</b>	<b>Secondary £app</b>
ESBD School Support Team	£0	£9.10	£0
FSM Eligibility Assessments (per FSM)	£0	£5.80	£5.14
Fischer Family Trust – School Licences *	£0	£0.88	£0
School Maternity / Paternity 'insurance' *	£36.57	£36.57	£36.57
Trade Union Facilities Time	£4.56	£4.56	£4.56
Trade Union Health and Safety Rep Time	£0.70	£0.70	£0.70
School Staff Public Duties & Suspensions Fund *	£0.94	£0.96	£0
<b>Total Per Pupil</b>	<b>£42.77</b>	<b>£52.76</b>	<b>£41.83</b>

Each maintained school has contributed from its 2017/18 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.

\* De-delegation from the secondary phase has ceased for these items. Contributions will not be taken from the secondary phase in 2018/19.



**APPENDIX 4: RESPONSES FORM**

**CONSULTATION & INFORMATION ON PRIMARY & SECONDARY FUNDING  
FORMULAE 2018/19 FINANCIAL YEAR**

Name \_\_\_\_\_ School / Academy \_\_\_\_\_

Please choose your phase below:

PRIMARY  SECONDARY

**THE DEADLINE FOR RESPONSES TO THIS CONSULTATION IS MONDAY 4 DECEMBER 2017**

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](mailto: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 'move to National Funding Formula' at April 2018? If not, please explain why not.**

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

If not, please provide further explanation here:

**Question 2: Do you agree with earmarking Schools Block funding on a phase-specific basis? If not, please explain why not.**

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

If not, please provide further explanation here:

**Question 3: Do you agree with the proposal to set the Minimum Funding Guarantee at 0% in 2018/19, subject to final affordability? 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 set the Ceiling at + 3% per pupil in 2018/19, subject to final affordability? 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 seek to fully implement the DfE's minimum per pupil funding floors in 2018/19, subject to final affordability? 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, currently in outline, to earmark unallocated primary phase Schools Block monies to support SEND costs in primary schools and academies (by enhancing the SEN Floor), understanding that this will require the transfer of these monies to the High Needs Block? If not, please explain why not.**

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

If not, please provide further explanation here:

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

**Question 8: Do you agree with the proposal to continue with our current definition of notional SEN where we move to National Funding Formula? If not, please explain why not.**

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

If not, please provide further explanation here:

**Question 9: Do you agree with the proposal to protect SEN Floor allocations for individual schools and academies in 2018/19 at least at their 2017/18 values? If not, please explain why not.**

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

If not, please provide further explanation here:

**Question 10: Do you agree with the proposal to continue the approaches to the factors currently outside the scope of the National Funding Formula as set out (split sites, pupil mobility, business rates, Growth Funding, BSF DSG affordability gap)? If not, please explain why not.**

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

If not, please provide further explanation here:

**Question 11 – Should sums continue or cease to be de-delegated from maintained school budgets in 2018/19 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>
<b>FSM Eligibility Assessments</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Fischer Family Trust – School Licences</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>School Maternity / Paternity ‘insurance’</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Trade Union Facilities Time</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Trade Union Health and Safety Rep Time</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>School Staff Public Duties and Suspensions Fund</b>	<input type="checkbox"/>	<input type="checkbox"/>

Please provide any additional comments here:

**Question 12 - Do you agree with the proposed criteria and methodology for the allocation of the growth funding to schools and academies in 2018/19? 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 13 - Do you agree with the centrally managed funds, and their criteria, that are proposed to be held in the DSG in 2018/19? If not, please explain the reasons why not.**

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

If not, please provide further explanation 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 Monday 4 December 2017:***

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