

MINUTES OF THE MEETING OF THE SCHOOLS FORUM HELD ON WEDNESDAY 8 JULY 2015 AT CITY HALL, BRADFORD

Commenced 0803

Concluded 1030

PRESENT**School Members:**

Bev George, Brent Fitzpatrick, Chris Quinn, Dominic Wall, Dianne Rowbotham, Dwayne Saxton, Emma Ockerby, Gareth Dawkins, Kevin Holland, Nick Weller, Nicky Kilvington, Nigel Cooper, Ray Tate, Sami Harzallah, Sara Rawnsley, Trevor Loft and Wendy Anderson

Non School Members:

Ian Murch and Michael Walsh

Nominated Subs:

Ian Morrel and Irene Docherty

Local Authority Officers:

Andrew Redding	Business Advisor (Schools)
Judith Kirk	Interim Assistant Director, Education and School Improvement
Linda Mason	Interim Assistant Director, Access and Inclusion
Raj Singh	Business Advisor
Tim Barker	Industrial Relations Senior

Observers:

Councillor Hinchcliffe	Portfolio Holder, Education, Skills and Culture
Councillor Pollard	
Councillor Sykes	Children's Services Overview and Scrutiny Committee, Chair
Lynn Murphy	Business Manager, Feversham College
Terry Archer	Dixons Academies Trust representative
Tom Bright	The Association of Teachers and Lecturers (ATL) representative

Apologies:

Members: Paul Burlurax, Sue Haithwaite, Tahir Jamil, Nigel Cooper and Vivienne Robinson

Officers: Stuart McKinnon-Evans (Finance Director), Michael Jameson (Strategic Director, Children's Services) and Terry Davis (Interim Deputy Director, Children's Services)

DIANNE ROWBOTHAM IN THE CHAIR**70. DISCLOSURES OF INTEREST**

There were no disclosures of interest for matters under consideration.



71. **MINUTES OF 20 MAY 2015 AND MATTERS ARISING**

(a) Report on progress made on “Action” items. The Business Advisor (Schools) reported that:

- **Update on Dedicated Schools Grant and Funding Matters (Item 61 page 45):** A progress report is presented to this Forum under agenda item 6. It was explained that, although work is progressing, the action plan on the spending of the one off monies for behaviour support and the report on the development of support for new arrivals and new to English pupils were not ready for this meeting and will be presented to the Forum in September.
- **The Implementation of a Living Wage in Schools (item 63 page 47):** It was reported that:
 - A consultation letter was published for schools and academies immediately after the Forum’s meeting in May; the Dioceses were contacted; and a briefing report on the living wage proposal was presented to the June Governor Forum meetings.
 - The Executive met on 23 June to consider the Council’s proposals further and a specific appendix to the Executive reported feedback from the Schools Forum and schools. This appendix was sent to Members in the paper packs (matters arising document Appendix 2). In summary, the gist of this feedback was support for the moral purpose of the policy with concerns about implementation / knock on implications and costs from implementation.
 - The proposal to implement a living wage was passed by the Executive on 23 June. The Executive also resolved that the impact of this policy on supervisory roles be undertaken, so that the Council has properly evaluated the outcomes on differentials in pay. It was explained that this would take time to complete. The living wage proposal will be implemented from 1 October (with no back pay).
 - The Council will continue to consult with schools on implementation.

The Senior Industrial Relations Manager was in attendance at the meeting. He further explained that the living wage is being treated as a non-consolidated payment, leaving the current pay and grading structure intact. He also added that the Council would be writing to schools, academies and other providers at the beginning of September.

- **2 year Old Places Capital Schemes (item 64 page 47):** It was reported that the request for a further £430,000 revenue contribution to capital was submitted and has now been approved by the Secretary of State. In giving approval, the DfE strongly encourages us to ensure that our new 2 year old provision is flexible (8am – 6pm), with providers offering 5 hour slots. Some discussion followed from this, with the Forum asking for a more detailed report to be presented on how the Local Authority is supporting the development of flexibility in early years provisions (including what guidance is being provided for schools) , as well as the Authority’s places planning strategy for the 2, 3 and 4 year old entitlements. This request was further considered under agenda item 7.
- **Use of Capital for Revenue:** Members were reminded that a question had been asked at the last meeting whether the DfE is considering allowing schools to convert capital funding for spend on revenue purposes as a way of enabling schools to manage their budgets in tighter financial times. It was reported that this

question has been put to the DfE but that we have yet to receive a response. Something may be included in the announcements accompanying the Chancellor's Budget Statement today. If nothing is announced then we will continue to chase a view from the DfE. In the absence of any response, we would suggest that this is not a proposal that the DfE is considering at the moment.

Resolved –

That the minutes of the meeting held on 20 May 2015 be signed as a correct record subject to Tom Bright (The Association of Teachers and Lecturers (ATL) representative) be recorded as attended.

ACTION: Assistant City Solicitor

72. MATTERS RAISED BY SCHOOLS

There were no matters raised by schools to report.

No resolution was passed on this item.

73. STANDING ITEM – DSG GROWTH FUND ALLOCATIONS

No new allocations were presented.

No resolution was passed on this item.

74. EDUCATION COMMISSIONING BOARD / SCHOOL IMPROVEMENT RESOURCES

The Interim Assistant Director, School Improvement, presented **Document ES**, which provided further information on the work that has taken place since the last Forum meeting on the establishment of a commissioning framework and governance structure for targeting the Joint Improvement Investment Fund and wider resources for school improvement, including the terms of reference of the Education and Commissioning Board.

The Interim Assistant Director emphasised the key principles behind these developments; moving to a school-led improvement system, where all schools and academies are rated good or outstanding and all are members of a partnership.

A significant amount of discussion followed the presentation of the report, during which Members made the following comments and asked the following questions:

- Do Elected Members sit on the Education and Improvement Strategic Board (EISB)? Who decides on the composition of this Board? What is the legal basis of this Board (what power does the Board have to take decisions on the spending of public monies)? The Interim Assistant Director responded by clarifying that Elected Members do sit on this Board, alongside headteachers, Council officers, governors and other representatives. It was agreed that further information will be provided for the Forum on the constitution, legal status and membership arrangements of the EISB.

Regarding the Education and Commissioning Board:

- Who is establishing this body? The Interim Assistant Director responded that this is being established by the Council.
- How does this body get its funding? The Interim Assistant Director responded that resources have been allocated from both the DSG (the current £1.246m Joint Improvement Investment Fund) and the Council's Base Budget.
- Where does school formula funding sit in these arrangements? The Business Advisor explained that the Education and Commissioning Board is a way of pulling together specific funding streams but it does not change the route of formula funding for schools and academies. However, a Member commented that the position of school budgets (balances) should be brought into all conversations about the allocation of additional resources.
- How does this system differ from what we do now? Do we need another "layer" of management? Why are we not just simply putting these resources straight into schools, rather than establishing another 'middle-man'? How will a reliance on national bodies / constructs (e.g. teaching alliances not based in Bradford) help Bradford? How will all the links in the chain work effectively?
- Some Forum Members stated they are not yet convinced by what is being established but also they are concerned about the lack of consultation so far on this as a direction of travel. The Interim Assistant Director explained that a number of conversations have taken place and that these arrangements represent a new school-led way of working, bringing together the different partnerships and increasing the monitoring of accountability of the partnerships and schools. She explained that the landscape is now very different from what it was a year ago (Regional Schools Commissioners, Teaching Alliances, Multi Academy Trust development etc). A Member expressed his view that what is being established, although needs refinement, brings clarity and a greater coherence, rather than competition, in the allocation of resources. Members expressed the view that this direction of travel should be more widely communicated, and that this kind of 'full and frank' discussion was needed with stakeholders across the District, in order to ensure consensus and consent.
- Who is the decision maker about how resources are allocated? How will the Schools Forum be involved in decisions and scrutinising the impact of the use of DSG resources? What is the timeline for the Schools Forum receiving reports? It was agreed that further detail would be provided to the Forum in response to these questions. It was also agreed that the detail of the decision making processes outlined in Appendix 2 will be clarified (including the position and legal status of the Board, how SLAs will be determined, the capacity the Board will have to action what is being planned).
- Governors are not mentioned as members of the Board? This needs considering, along with representation from Multi Academy Trusts. The Forum recognised that new Multi Academy Trusts are likely to operate in the District in the future and that these need to be successfully brought into these arrangements.
- What are the costs of running the Education and Commissioning Board and how will these costs be met? The Interim Assistant Director stated that no request is being made for additional resources for running costs.
- What is the strategy for spending the £1.246m Joint Improvement Investment Fund? On what data will this be based? The Interim Assistant Director responded that the Authority holds a lot of data about the position of schools, academies and groups of children, and that this data will drive spending decisions. There is now some imperative to 'get on with it' in terms of using the Joint Improvement Investment Fund. The first meeting of the Board is being planned for the week

commencing 14 September.

- The Chair of the Children's Services Scrutiny Committee stated that the arrangements set out in the report are silent on the role of the Scrutiny process, having previously received a commitment to Scrutiny's involvement in these arrangements. This needs to be resolved.

Resolved –

- (1) **That the establishment of the Education and Commissioning Board be agreed.**
- (2) **That a report be presented to the Schools Forum, in October 2015, which responds to the questions asked by Forum Members that are recorded in the minutes of this meeting (including on the constitution of the Education Improvement Strategic Board, membership and working arrangements of the Education and Commissioning Board, how and when this Board will report to the Schools Forum, and how the Authority is communicating with stakeholders about the transition to a school-led improvement system).**

Action: *Interim Assistant Director, Education and School Improvement*

75. UPDATE ON DSG AND FORMULA FUNDING MATTERS

The Business Advisor (Schools) presented **Document ET**, which provides an update on the position of Dedicated Schools Grant funding matters.

Following the presentation of the report, Members made the following comments:

- That the implementation of the National Funding Formula (NFF) appears to have been put off until 2017, with 2016/17 as a stand still year, but that the extent of change in 2017 is likely to be significant. If the proposals put forward by the F40 group of local authorities (the lowest funded local authorities) give any indication of the direction of travel, Bradford is likely to be a significant loser under the NFF. A figure of a possible loss of 7.5% per pupil was stated.
- Following from the discussion under matters arising, that the Forum needs to have a clearer view about what is happening currently to the distribution of 2, 3 and 4 year olds and demographic trends across the District. The Forum asked how the Authority is co-ordinating and responding to these trends, including supporting maintained schools in developing the flexibility of their offers. A Member commented that flexibility appears to be one of the key factors currently affecting take up (to the detriment of the numbers in maintained settings that do not offer flexible sessions). A Member reported that a number of colleagues have raised concerns with them about their falling nursery numbers.

Resolved –

That a report be presented to the Schools Forum, which provides more information on Early Years places planning and on the Authority's strategy (and guidance) for the further development of flexibility in the free entitlement offer delivered by maintained settings.

Action: *Business Advisor (Schools)*

76. SCHOOL BUDGETS 2015-16 – EMERGING THEMES

The Business Advisor (Schools) presented **Document EU**, which summarises the main themes that have been identified so far in discussions with maintained schools about their 2015-18 budget positions. It was explained that this report, following on from discussion at the last meeting, was presented for early information, in anticipation that the Forum will wish to further consider these themes in making recommendations on the 2016/17 DSG distribution and formula funding arrangements.

Following the presentation of the report, Members asked the following questions and made the following comments:

- What checks are in place to identify where a school maybe deviating from its planned budget, especially in schools in their lead up to conversion to academy status (where any deficit comes back to the DSG)? The Business Advisor (Schools) responded by explaining the powers of intervention that the Authority has (Notices of Concern and ultimate Suspension of Financial Delegation), which are used in addition to a robust system of monitoring of school finance positions.
- That the Authority should monitor the position of vacancies in schools, recognising the link between school improvement and the quality of teaching.
- That the Authority's placement of children with SEND using Notes in Lieu, without specific additional funding, is significantly adding to the financial pressure on schools.
- That the primary building estate generally is in poor shape and that the Forum must keep an eye on this.

Resolved –

That the contents of Document EU be noted.

77. SCHOOLS' FINANCIAL VALUE STANDARD

The Business Advisor (Schools) presented **Document EV**, which provides the Forum with an update on the compliance of maintained schools with the Schools' Financial Value Standard (the SFVS) at 31 March 2015.

A Member asked whether Internal Audit's grading of SFVS returns could be shared with individual schools. The Business Advisor (Schools) stated that he would discuss with Audit whether this will be possible.

Resolved –

That the contents of Document EV be noted.

78. FINANCIAL CLASSIFICATION OF MAINTAINED SCHOOLS 2015/16

The Business Advisor (Schools) presented **Document EW**, which provides the Forum with a summary of the categorisation of maintained schools under the Local Authority's Financial Classification of Schools for the 2015/16 academic year. It was explained that the year on year analysis identifies an increase in the number of schools placed in

categories A and C (schools showing vulnerability to deficit).

Members asked whether the finance training, which governors of schools placed in categories A, B and C are required to attend, is available for all governors. The Forum would wish to encourage schools in category D to be pro-active about the development of understanding of their governors and their financial management. It was clarified that this training is available for all governors, with sessions being run twice termly.

Resolved –

That the contents of Document EW be noted.

11. SCHOOLS FORUM STANDING ITEMS

There were no further updates on the Forum's standing items:

No resolution was passed on this item.

12. AOB / FUTURE AGENDA ITEMS

No resolution was passed on this item.

13. DATES OF NEXT MEETINGS

Resolved –

That future meetings of the Schools Forum 2015/2016 Academic Year be held at 0800 on the following dates:

- **Wednesday 23 September 2015**
- **Wednesday 21 October 2015**
- **Wednesday 9 December 2015**
- **Wednesday 6 January 2016**
- ***Wednesday 13 January 2016 (provisional meeting)***
- **Wednesday 16 March 2016**
- **Wednesday 18 May 2016**
- **Wednesday 6 July 2016**

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

minutes\SF8July Draft Version

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

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22 June 2015

Mr Michael Jameson
Strategic Director Children's Services
Room 202
City Hall
Bradford
D1 1HY

Dear Mr Jameson

Inspection of Bradford local authority arrangements for supporting school improvement

Following the visit by Her Majesty's Inspectors (HMI) Margaret Farrow, Jane Austin, Bernard Campbell and Helen Lane to Bradford local authority between 15 and 19 June 2015, I am writing on behalf of Her Majesty's Chief Inspector of Education, Children's Services and Skills to confirm the inspection findings.

Thank you for your cooperation and that of all the staff whom we met during our visit. We particularly appreciate the time and care taken to prepare the programme for us. Please pass on our thanks to your staff, the lead and elected members, partners, headteachers and governors who kindly gave up their time to meet us.

The inspection of local authority arrangements for supporting school improvement in England is conducted under section 136(1) (b) of the Education and Inspections Act 2006.

Evidence

The findings of this inspection are based on discussions with:

- elected members, senior officers from the council's school achievement service and representatives from other council services that support school improvement
- headteacher and governing body representatives from maintained schools and academies representing all phases of educational provision
- partners involved in school improvement and school-to-school support such as the Bradford primary, secondary and Catholic partnerships, teaching school alliances and partners representing the Early Years Foundation Stage and post-16 phases of education.

The outcomes from focused inspections of eight schools and a telephone survey of a sample of 14 leaders from maintained schools and academies were also considered as part of the inspection evidence. These were undertaken in the week beginning 8 June 2015. Inspectors reviewed a wide range of documentation, including the local authority's evaluation of its own effectiveness, recent improvement strategies, reports to elected members and school performance data provided to schools.

Summary findings

The local authority has been too slow in driving improvement in the attainment, progress and attendance of pupils and in narrowing the gaps between disadvantaged and other pupils across the district.

Although rising, not enough children achieve a good level of development in the Early Years Foundation Stage. Too few pupils make good progress from their very low starting points on entry to Key Stage 1 to the end of their primary education. This is particularly true of disadvantaged pupils, disabled pupils or those with special education needs.

The proportion of students gaining at least five good GCSEs at grades A* to C, including English and mathematics, by the end of Key Stage 4 fell significantly in 2014 to well below that found nationally. Attendance rates are below average and unauthorised absence rates are well above average. The majority of outcomes for pupils at Key Stages 2 and 4 place Bradford in the lowest 10% of local authorities nationally.

Despite being the 24th most improved authority for level 3 qualifications in 2014, not enough students achieve academic qualifications at levels 2 or 3 by the age of 19. The achievements of boys lag well behind those of their peers nationally, particularly at the higher A* to A grades for A-level qualifications. Success rates are, however, above average in vocational qualifications. In 2014, the proportion of disadvantaged students gaining level 3 qualifications was similar to that found nationally. The proportion of young people aged 16 to 19 not in education, training and employment has fallen to the lowest level seen in Bradford. However, the proportion remains above that found nationally.

Previous strategies and partnerships have been ineffective in improving the quality of school provision or preventing schools from deteriorating, particularly in the secondary sector. Consequently, too many pupils in Bradford attend schools that are not good; around a third of primary-aged pupils and well over half of secondary-aged pupils. Although the number of primary schools judged inadequate at the time of their Ofsted inspection is low, the proportion that requires improvement is twice the national average. Ten per cent of secondary schools are inadequate, which is well above the national average.

Around half of schools with sixth forms have a judgement of requires improvement for their sixth form provision and one is judged inadequate. Local authority roles and responsibilities for supporting and challenging academic achievement in maintained

sixth forms are unclear. The 14–19 team has had limited communication with school achievement officers about the performance, support and challenge for sixth forms. There has been a lack of coherence in the use of post-16 data and information between the two groups to identify those at risk of underperforming or in highlighting good practice to share across the partnership of schools.

The local authority's support and challenge for leadership has not been effective. There has not been enough good or outstanding leadership to build capacity across the school sector. School-to-school partnerships are well established in Bradford. Schools have traditionally worked together to support each other through the Bradford Catholic, primary and secondary partnerships. Until recently, the local authority provided little strategic leadership to, or quality assurance of, these partnerships. This meant that ineffective or complacent partnership arrangements were not sufficiently checked or challenged, and good practice was not extensively identified or shared. Quality assurance arrangements for evaluating the impact of local authority achievement officers have also been insufficiently robust to ensure timely intervention in schools at risk or to hold staff to account fully for the impact of their work. Mechanisms to identify schools at risk of declining performance have consequently been inconsistent and the school achievement services and partnerships have been reactive rather than proactive. This has contributed to the lack of sustained improvement across schools and academies in Bradford.

Governors who talked to inspectors speak highly of the support from governors' services. Local leaders of governance work in the same way as national leaders of governance in supporting governing bodies in difficulties and on interim executive boards. However, their expertise is stretched. The governing body support service does not contribute effectively to the risk assessments of school leadership and governance.

There is a new direction in the local authority and a cause for optimism. Headteachers, governors and partners speak convincingly about a 'step-change' in the authority's approach and a new rigour and challenge to schools and partnerships. This follows the appointment of the strategic director for children's services just over a year ago and, more recently, the appointment of the Interim Assistant Director of Education and School Improvement and the secondment of two senior officers into the Bradford primary and secondary partnerships.

On his appointment, the strategic director quickly commissioned an external review of school improvement arrangements. Based on this, with partners, he has developed a strategy for rapid improvement – the 'Bradford School Improvement Strategy 2015' – to tackle the significant weaknesses identified by the review. He has successfully harnessed the commitment of all political leaders, elected members, senior local authority staff, school, academy and free school leaders to a new school-led model of improvement. The strategy identifies a leaner strategic role for the authority in brokering and facilitating school-to-school support and a more rigorous approach to monitoring and evaluating the impact of services and partners' work to drive improvement in schools. The strategy is aligned closely to the council's overarching strategy, the New Deal for Bradford, and the council's children and young people's

plan. It has a small set of very appropriate priorities with ambitious targets for improvement. It is too early in its development to have had time to tackle the history of underachievement across the community of primary and secondary schools and the lack of sustained school improvement.

A strength identified in discussions throughout the inspection is the sense of urgency, purpose and commitment to driving improvement across all providers. Academy and free school leaders report that the local authority makes no distinction between academies and maintained schools and 'all children are in the authority's line of sight', no matter what type of school they attend. The director has written formally to 11 academies since the autumn, challenging their declining performance and work is ongoing with these academies to improve their performance. The local authority raises concerns about academies with the Regional Schools Commissioner appropriately and formally. The strategic director is keen to work closely with regional and national government to identify suitable sponsors and structural solutions to accelerate school improvement in secondary schools causing particular concern.

School leaders speak positively about the work of the Schools Forum¹. The forum carries out its duties highly effectively and is well informed and supported by local authority officers. Leaders report positively on the work of human resources and finance officers in securing robust arrangements for financial management and staffing issues. They value the training for child protection procedures and they particularly value the training on child sexual exploitation and risks from extremism or radicalisation through the work of the Prevent team.

Areas for improvement

- Accelerate the work begun to raise pupils' achievement and attendance at all levels, by:
 - implementing the agreed school improvement strategy as a matter of urgency
 - increasing the level of challenge to schools and commissioning more effective support to bring about more rapid and sustained improvement
 - further improving processes for assessing risks to schools so that timely actions can be taken to prevent decline and increase the number of good or outstanding schools
 - improving the strategic use of school performance and management information to ensure timely challenge to all sectors and providers where weaknesses are identified; this includes better utilisation of information from services working with schools such as governor support services in identifying schools that may be at risk of decline
 - using more successful and experienced headteachers more extensively beyond their own schools to enable other schools to accelerate their improvement

¹ Bradford's Schools Forum is a representative group of headteachers, governors and non-school members established by statutory instruments issued by the Government. Forums were established nationally in 2002 primarily as bodies for local authorities to consult on school budget related issues, such as formula funding, contracts funded from the schools budget, and provision for the education of pupils with special educational needs.

- ensuring that local authority staff and leaders commissioned to work with schools are held rigorously to account for the impact of their work
- reviewing the value for money of the current pattern of post-16 provision and then acting on outcomes with partners to raise achievement and increase the proportion of young people moving successfully into education, training and employment
- continuing to work with regional and national agencies to identify expert partners to help solve deep-seated and intractable issues in schools facing the most challenging circumstances, particularly in the secondary sector.

Corporate leadership and strategic planning

- The leader of the council, portfolio holder for children's services and elected members across the political spectrum share the strategic director's vision, sense of urgency and determination to ensure that every pupil attends a good school and reaches national expectations in their tests and assessments by 2018.
- Members expressed frustration about the lack of impact of previous strategies in driving improvement and are determined the same cannot happen again. They quickly embraced recommendations from the external review of school improvement arrangements across the district. Members fully endorse the development of the recent school improvement strategy with its clear, measurable and challenging targets for improvement.
- The New Deal for Bradford places good schools and a great start for all children at the heart of the vision for success in Bradford. This informs Bradford's school improvement plan's priorities of:
 - children starting school ready to learn
 - accelerating the rate of achievement and attainment of students
 - young people leaving school ready for the world of work and life.
- School leaders were consulted with effectively during the strategy's development and agree fully with it. They report positively about the early steps of its implementation. For example, they applaud the additional council funding to strengthen recruitment and retention of school staff. They also value the deployment of two local authority senior officers to the Bradford primary and secondary partnerships, to provide challenge, expertise and to hold the partnerships to account more effectively for the impact of their work.
- School leaders and governors express confidence in the changes in leadership in children's services and the recent senior appointments. They welcome as a 'breath of fresh air' the 'game-changing' approach and the added pace, vigour and promptness of early actions. Members, senior local authority staff and school leaders know it is too early to see the impact of these changes.
- The local authority and its partners also have a clear vision for improving the quality of vocational provision and for young people to access suitable education, employment and training opportunities. The local authority and post-16 partners have successfully ensured an above-average level of participation rates for 16- and

17-year-olds. They have reduced the proportion not in education, employment or training to the best level yet. However, they know more needs to be done to ensure all provision is at least good and to drive improvement in outcomes for post-16 students, particularly in academic qualifications.

Monitoring, challenge, intervention and support

- In the past, the local authority has not used the wide range of data and information it holds about schools' performance effectively enough at a strategic level. It has failed to identify schools at risk and intervene quickly enough to halt decline and drive improvement. School leaders report that recently there has been a much more tenacious and regular review of the accuracy of school's assessment information. It is too soon to see the impact of the changes initiated.
- The local authority provides very detailed performance data for schools to access online. School leaders report positively about its usefulness and value the openness in relationships that allows schools to compare each other's data. The authority has recognised that the analysis and use of data to challenge schools about their performance has not always been timely or effective enough. It has taken recent action to improve this, for example by moving to analysis of performance in national assessments, tests and examinations before the start of the new academic year.
- System leaders (senior school staff and teaching schools alliance staff who are commissioned to work with schools) and local authority achievement officers accept that, until recently, school-to-school support has not been effective enough. Interventions in schools causing concern and work with schools at risk of underachieving have not been prompt enough to halt or anticipate decline. This has been evident in the lack of sustained improvement in standards, progress and attendance rates in the district. It is also evident in the increasing number of secondary schools judged inadequate.
- Plans for school-to-school support have lacked rigorous success criteria to hold staff fully to account for the impact of their work. This includes quality assurance arrangements for evaluating the impact of achievement officers and system leaders. For example, achievement officers' notes of visits to targeted schools are of variable quality. Some are very detailed and identify the level of challenge brought to bear and next steps needed to drive improvement. Others merely provide a commentary on what has been done.
- Elected members receive half-termly tracking information on numbers of schools causing concern to the local authority. There is little commentary or explanation of what the information means, or what difference actions have made to the reducing numbers of schools identified as high priority. Such weaknesses are being tackled through the development of a commissioning strategy with precise measures for improvement.
- School leaders and partners report that the process of working with schools causing concern to the local authority has become more rigorous. This is due not least to the recent strengthening of procedures employed by achievement officers in reviewing a school's effectiveness. There is now a much more evidence-based

approach in checking what is actually happening in schools. Monitoring letters from HMI of schools that require improvement, in the main, recognise the positive impact of interventions undertaken by school improvement staff. Nonetheless, this work has not yet resulted in an increase in the number of good schools.

- Within Bradford, the comparatively low numbers of good or outstanding school leaders has restricted the capacity for school-to-school support to help drive improvement. There are examples of successful deployment of executive heads leading to rapid improvement. However, the authority recognises that limited use has been made of this pool of talent to bring about improvement in less successful schools. There are plans to increase the number of executive headteachers deployed from September this year.
- The local authority has improved identification of good practice through the partnerships and teaching school alliances and, while recognising that more needs to be done, is beginning to share this more widely.
- The local authority has used its powers of intervention modestly. Where it has used its powers to replace governing bodies with interim executive boards, these have largely been effective. For example, the very timely replacement of the governing body at Carlton Bolling School has contributed to improvements in leadership there. Concern was expressed during the inspection that the scope of an interim executive board is not always a broad enough solution to the deep-seated problems identified in some of the most challenging secondary schools.
- Until recently, the local authority has made limited use of its right to issue formal warning notices to schools causing great concern. It has depended too much on informal, pre-warning notices. Senior officers are aware that this needs to change and have recently issued a warning notice without recourse to informal pre-warning procedures.

Support and challenge for leadership and management (including governance)

- School leaders speak convincingly about the local authority's improved and more tenacious relationships with Bradford Catholic, primary and secondary partnerships, teaching school alliances and other system leaders. They report the start of a more strategic approach in the brokering and deployment of school-to-school support for schools in need of improvement and an increased ability to identify and then intervene more quickly to tackle risks of decline.
- Headteachers and governors of schools at most risk report positively on the impact of recent interventions. They consider that the support and challenge has been coordinated and timely and can cite examples of where improvement has occurred. However, in the past, early identification of need has not been timely or sharp enough to increase the proportion of good or outstanding schools in the primary or secondary sectors.
- Until very recently, the local authority's risk assessments of schools were not accurate enough. For example, the September risk register identified some schools as low risk, despite a decline in performance over time. Some notes of visits by achievement officers reported positively on outcomes at the end of Key

Stage 2 but did not express concerns to leaders about a year-on-year decline or lack of improvement at Key Stage 1.

- The recently appointed interim assistant director for education has quickly developed a more robust risk assessment system. This is now used to inform the deployment and coordination of support from the partnerships, teaching school alliances and achievement officers. Not enough use has been made of the information held by other services who work with schools, such as finance, human resources, attendance and inclusion teams and governor support services, in contributing to early warning signs of potential decline or concern or in identifying and disseminating good practice.
- Governors speak highly of the governing body support service's clerking arrangements and training. There have been some profitable drives with businesses and the local community to recruit new governors. As a result, the percentage of vacancies has fallen well in the last year and is below that found nationally. However, systems developed by the service to evaluate the quality of governance are weak, including the analysis of the impact of training or identification of needs. Risk assessments are not robust and there is little evidence of the impact of the service's work to improve governance over time.

Use of resources

- The local authority and the Schools Forum recognise that the use of resources does not represent good value for money currently, given pupils' below average achievements and the lower-than-average proportions of good or outstanding schools. Nevertheless, school leaders report that the Schools Forum carries out its duties rigorously.
- The forum is well informed and supported by local authority officers. Financial modelling for the forum and schools is strong: local authority finance officers know their schools well. School leaders speak of a collegiate responsibility for every child in Bradford: members of the forum are not parochial when making spending decisions. The forum has a thorough, thoughtful understanding of the needs of vulnerable students and has given detailed consideration to the allocation of resources to support them.
- The local authority judiciously adjusts funding to meet changing school needs and school leaders report an openness and transparency within the Schools Forum. They are aware that, in line with the commitment to streamline school improvement services in the council, the amount of per-pupil funding delegated to schools is increasing and is now above average.
- Local authority officers are working closely with school leaders and the forum to tackle the history of underachievement in schools as a matter of urgency. The forum, with the approval of the Secretary of State, has agreed £1.26 million joint investment funding from designated schools' grant reserves to improve systems for commissioning school-to-school support. The forum is currently developing an accountability framework to ensure that robust mechanisms are in place to measure the impact of the use of these significant additional resources.

- As an expression of the council's commitment to drive improvement in the quality of leadership and teaching in schools, it has provided an additional £660,000 over three years for improving recruitment and retention of teachers and leaders in schools; this is in the context of reducing budgets across the public sector. This initiative has got off to a prompt start, with innovative approaches to sharing information about prospective teachers and to promoting the district to teachers new to the profession.
- The local authority has taken effective action to increase the number of places in existing schools to provide for the rapidly rising numbers of pupils in Bradford. It continues to monitor the expanding numbers and the pressure on places carefully. The council has recently provided £770,000 to match-fund the Department for Education's contribution to meet the increased demand for school places.

I am copying this letter to the Secretary of State. This letter will be published on the Ofsted website.

Yours sincerely

Margaret Farrow
Her Majesty's Inspector

SCHOOLS FORUM AGENDA ITEM

For Action



For Information



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

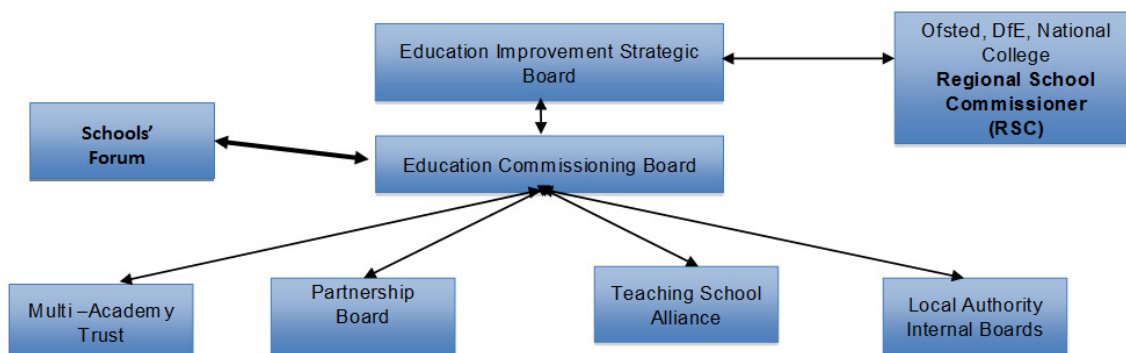
- The Assistant Director for Education and School Improvement reported to the Schools' Forum meeting of 8 July 2015 on the development a Governance structure to support the introduction of a school-led system for school improvement;
- This paper provides an update on the continuing work to developing a commissioning framework for the targeting of resources to need for school improvement.

Date (s) of any Previous Discussion at the Forum

8 July 2015 and 20 May 2015

Background / Context

- The Schools' Forum agreed to the establishment of the Bradford Education Improvement Commissioning Board (BEICB) at its July 2015 meeting. At that meeting members made requests for further clarification and asked some specific questions. It was resolved that a response to the questions would be provided to the next Schools' Forum meeting.
- Since the last Schools' Forum meeting, officers and headteacher representatives have met to further develop the terms of reference for the Bradford Education Improvement Commissioning Board (appendix 1) and to agree arrangements for the membership and operation of the Board from the beginning of the autumn term 2015.
- The following diagram of the proposal that was agreed at the previous Schools' Forum meeting is included here. A clear link to the Schools' Forum has now been included in the diagram.



Details of the Item for Consideration

Questions from the Schools' Forum meeting of 8 July 2015:

1. **Do Elected Members sit on the Education Improvement Strategic Board (EISB)? Who decides on the composition of this Board? What is the legal basis of this Board (what power does the Board have to take decisions on the spending of public monies)?**

The EISB was set up in 2011 when school improvement services were returned to the Council. The membership includes the Leader of the Council, who chairs the Board, and elected members from the main political parties, representative headteachers and representative governors, the Chief Executive, Strategic Director and Assistant Directors in Children's Services, a FE representative and a university representative. The Board was set up to be a champion of the district's children, young people, and their parents in terms of their educational provision.

However the Board has proved to be too large and unwieldy. As a result a decision was made by the Board to decrease its membership and to appoint an independent chair. Discussions are on-going about the details of its terms of reference but its primary aim as an advocate for children, young people and parents is unchanged. An interim chair has been appointed for 6 months, whilst recruitment plans are finalised. She is Heather Flint, an experienced headteacher, senior local authority officer and ex-challenge adviser from the London Challenge.

The operation of the EISB is supported by educational partners across Bradford. It allows the Council to carry out its statutory duties in a collaborative way. It has no powers to make spending decisions. The expectation is that the spending decisions will be made at Schools' Forum and by the Bradford Education Improvement Commissioning Board. The EISB will hold those bodies to account for the effectiveness of those spending decisions.

2. Who is establishing the Bradford Education Improvement Commissioning Board (BEICB)?

The Council is establishing the Board following detailed conversations with all key stakeholders. It is agreed that a Commissioning Board is an important aspect of delivering a school-led school improvement system. Advice and guidance is being sought from NHS managers who have established a board with a similar function

3. How does this body get its funding?

The funding is sourced from the de-delegated DSG (£1.246m Joint Improvement Investment Fund in 2015/16), Council base budget (eg £220k for leadership development in 2015/16) and grant funding (eg drawn down from National College for Teaching and Leadership)

4. Where does school formula funding sit in these arrangements?

The BEICB is a way of pulling together specific funding streams but it does not change the route of formula funding for schools and academies. Members should be reassured that the position of school budgets are always taken into account before any additional funding is provided.

5. How does this system differ from what we do now? Do we need another "layer" of management? Why are we not just simply putting these resources straight into schools, rather than establishing another 'middle-man'? How will a reliance on national bodies / constructs (e.g. teaching alliances not based in Bradford) help Bradford? How will all the links in the chain work effectively?

The BEICB provides for absolute clarity and transparency about how additional funding is allocated to schools, groups of school, school partnerships and other stakeholders. It allows for additional resources to be targeted at specific areas of underperformance and to support developments that are required by Bradford's pupils. The transparency extends to the outcomes that are agreed before funding is allocated, with the understanding that funding will be withdrawn should appropriate progress against milestones not be made.

Specific expertise sits within Bradford's schools, its Teaching School Alliances and in some cases external / national bodies. Bradford needs to access this capacity to make the necessary improvements in a school-led system.

The BEICB will allocate funding to key organisations and will insist outcomes are delivered. This Bradford-wide approach will ensure funding is targeted and there is no duplication or double accounting.

6. Who is the decision maker about how resources are allocated? How will the Schools' Forum be involved in decisions and scrutinising the impact of the use of DSG resources? What is the timeline for the Schools Forum receiving reports?

The decision makers will be the members of the Board, which has now been agreed,

- 1 representative from each of the formal school Partnerships (Bradford Partnership, Bradford Primary Improvement Partnership, Catholic Schools Partnership, Special Schools Partnership, Nursery Partnership).
- 2 representatives from the Bradford Teaching Schools
- 3 representatives from the Local Authority including colleagues seconded from Local Authority to the formal Partnerships (Primary and Secondary)

- 2 representatives from the Schools Forum to include the Finance representative and a headteacher
- A Governor representative
- Recruitment & Retention lead

Membership of the BEICB is for two years.

The Board will meet 6 times a year (this may be more regular during the initial stages of the board set up).

The 2 representatives from the Schools' Forum will be involved in all decision making and monitoring of the impact of all resources deployed by the Board. They will be expected to report back to each Schools' Forum meeting. The BEICB will provide reports, as required, to monitor and evaluate the impact of the commissioning framework and implementation of the workforce talent management strategy and all other commissioned activity.

BEICB members will not be members of the Education Improvement Strategic Board (EISB) because of the potential conflict of interest.

7. Governors are not mentioned as members of the Board? This needs considering, along with representation from Multi Academy Trusts.

A governor representative will be a member of the Board. Initially this position may be vacant until a recruitment exercise has been completed.

Multi Academy Trusts will be represented through the Partnership headteachers. The Board will have the power to second additional members onto the Board if they wish.

8. What are the costs of running the Education and Commissioning Board and how will these costs be met?

There will be no additional costs apart from the time of members

9. What is the strategy for spending the £1.246m Joint Improvement Investment Fund? On what data will this be based?

Funding will be allocated under three broad headings: to support,

- schools that are underperforming and causing concern and whose budgets won't provide for the necessary interventions
- the development of thematic issues (eg KS1 reading)
- CPD development, such as a leadership development program.

Some of the funding available to the Board will be ring fenced and other resources will be for open use. It is expected the responsibility for the improvement of the schools causing concern will be shared between the Partnerships and the LA. Block funding will be allocated to, say, the Bradford Partnership to oversee the improvement in underperforming secondary schools. That Partnership will manage the allocation to each school and its support network, and will closely monitor the progress of the schools. The LA will be responsible should further intervention (including statutory) be required. The Partnership and LA will be accountable to the Board for the impact of that funding.

Bradford's extensive data offer allows all schools and the LA to see all data. This will be used by the partners and the BEICB to inform spending decisions.

Written requests will be received for other activities. Discussion is on-going as to whether bids will need to be reviewed by a gatekeeper to ensure the process is manageable. The Board is minded to agree termly key priorities for CPD and thematic developments and to invite organisations to target these areas.

10. Further information about the develop of the Bradford Education Improvement Commissioning Board (BEICB)

- Invites to join the Board have been sent to member organisations. The first meeting is scheduled for Monday 14 Sept 2015 (see appendix B for the agenda). Whilst it is expected that meetings will be half termly, the early meetings are to be more frequent and have been scheduled for 29 Sep 2015, 12 Nov 2015, 5 Jan 2016.

- The Board is aware that some grant funding could have a significant impact if it were enhanced. The Board will consider match funding other ring fenced grant when there is clear evidence the outcomes can be improved and impact accelerated. There is a real awareness that improvement must be accelerated.
- An LA officer, Mike Garside, is to take on specific responsibilities in coordinating the work of the BEICB.

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

None

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

This proposal directly addresses the priority outcome focus 'Good Schools and a Great Start for All Our Children':

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

Recommendations

1. Note the updated information that is provided in this report.

List of Supporting Appendices / Papers (where applicable)

Appendix 1 - Bradford Education Improvement Commissioning Board - Terms of reference

Appendix 2 – Commissioning Board Membership Invite Letter

Contact Officer (name, telephone number and email address)

Judith Kirk

Assistant Director Education and School Improvement

Judith.kirk@bradford.gov.uk

Appendix 1 - Bradford Education Improvement Commissioning Board Terms of reference

Purpose / role of the group

The Bradford Education Improvement Commissioning Board (BEICB) was established in September 2015 to provide a forum to ensure effective collaboration and joint accountability between the Local Authority, formal School Partnerships, the School Forum and Teaching School Alliances within a self-improving school led system. The board reflects the changing roles of schools and local authorities, serves to join the collaborative school partnerships and Teaching School Alliances in Bradford, providing a vehicle for the commissioning and accountability of effective support. It plays a key role in ensuring that the following principles are achieved:

- Bradford is a school-led system
- All schools have to be good or better
- All schools have to belong to a formal partnership

The aims of the BEICB are:

- To ensure resources are effectively deployed and have an impact on the raising of standards in all key stages across the District.
- To identify, discuss and address issues of common concern and avoid unnecessary duplication of resource in order to ensure value for money and efficiency.
- To implement the Bradford commissioning framework in order that schools and settings can access support and targeted intervention and that appropriate funding can be sought where available (e.g. targeted school support fund, DSG).

Membership

The membership of the BEICB is reflective of formal Partnerships in Bradford and is constituted from the following membership:

- 1 representative from each of the formal school Partnerships (Bradford Partnership, Bradford Primary Improvement Partnership, Catholic Schools Partnership, Special Schools Partnership, Nursery Partnership).
- 2 representatives from the Bradford Teaching Schools
- 3 representatives from the Local Authority including colleagues seconded from Local Authority to the formal Partnerships (Primary and Secondary)
- 2 representatives from the Schools Forum to include the Finance representative and a headteacher
- A Governor representative
- Recruitment & Retention lead

Membership of the BEICB is for two years.

The Board will meet 6 times a year (this may be more regular during the initial stages of the board set up).

Accountability

- Each representative is responsible for reporting back on activities of the board to the group they represent.
- The BEICB will provide reports, as required, to monitor and evaluate the impact of the commissioning framework and implementation of the workforce talent management strategy and all other commissioned activity.

Review

- Terms of reference and the effectiveness of the BEICB will be reviewed annually.

Working methods/ways of working

The group will be responsible for commissioned work for a variety of purposes. All funding will be commissioned according to priority and need.

The BEICB will:

- Use the commissioning framework to provide support to schools:
- Deploy resource and funding to effect school improvement:
- Ensure all delegated funding is within a framework of accountability including success criteria, milestones and impact measures. The Board will have the authority to cease funding if the impact of the commissioned work is not being achieved:
- The Board will report the progress of commissioned work to the Education Improvement Strategic Board.

The group will elect a chair, who should remain in post for two years. All members can contribute to the agenda of the meeting. Where appropriate, colleagues leading strands commissioned by the commissioning framework or the Workforce Talent Management Strategy will be invited to attend the meeting to report on the impact of the strategy.

Appendix 2 – Commissioning Board Membership Invite Letter

Dear XXXXX

Re: Commissioning Board Membership invite

With the plans for the Bradford Commissioning Board now underway, we are in a position to begin to form the membership of the Board.

The current proposals are to include members from the following groups and organisations, which as you can see include your own.

The membership of the BEICB is reflective of formal Partnerships in Bradford and is constituted from the following membership:

- 1 representative from each of the formal school Partnerships (Bradford Partnership, Bradford Primary Improvement Partnership, Catholic Schools Partnership, Special Schools Partnership, Nursery Partnership).
- 2 representatives from the Bradford Teaching Schools
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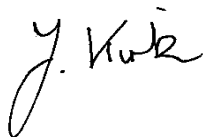
We would request that you consider who is best placed to represent and submit that colleague's name to us by the time of the first meeting on Monday 14 September 2015. The agenda will be circulated on the 7 September 2015.

Interested parties must not be a member of the Education Improvement Strategic Board - to avoid any conflict of interest and to ensure that accountability for the work of the Board is objective and quantifiable. These representatives should also not be LA appointed Area Heads, as they may form a part of the quality assurance process of the commissioned work in schools.

Details of the terms of reference of the Board were circulated at the recent Schools' Forum meeting, and we have attached them with this letter. We would recommend sharing these so that informed decisions about the correct representative may be made.

If, in the meantime, you have any questions about the posts under proposal please do not hesitate to contact me on the details overleaf.

Yours sincerely



Judith Kirk
Interim Assistant Director
Education and School Improvement

SCHOOLS FORUM AGENDA ITEM

For Action

For Information

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

To commission pilot centres of Good practice to support schools in admitting New to English (NtE) learners in Bradford.

NtE learners need to make accelerated progress in order to close the attainment gap with their peers and achieve their potential. The any Other White and Roma ethnic groups represent the largest number of NtE learners recently moving to the Bradford District.

Date (s) of any Previous Discussion at the Forum

There has been no formal presentation to the Forum.

Background / Context

- Bradford continues to have a growing and changing mobile population which provides different and additional challenges to schools which some schools within the district have already addressed over time and have demonstrated some successful and effective strategies.
- New to English pupils will continue to arrive in Bradford as the Gateway Refugee programme continues and Syrian refugees and other asylum seekers continue to flee from troubled parts of the world in addition to the European economic migrant community.
- Some schools are receiving NtE children for the first time as the population both moves out of the central areas of Bradford and new EU Migrant families, asylum seekers and refugees arrive in the country. These schools need to quickly train their staff and adapt to the linguistic, academic, personal and cultural requirements of their new communities.
- The head of the Education service for New Communities and Travellers and the New Arrivals Closing the Gap Strategy Group have worked with the external consultant over the last two terms to explore ways in which capacity to support schools in meeting the teaching and learning needs of New Arrivals could be increased and identify how the gap in achievement for this group can be closed more rapidly.
- The current proposal is based on the work of this service and group over the last 12 months.

Details of the Item for Consideration

The Local Authority strongly supports a sector led model of school improvement and is increasing its focus on school to school support as being the most effective way to narrow attainment gaps and raise standards.

Towards this end, the LA seeks to establish up to six Centres of Good Practice (hubs) to build capacity in successful schools to support other schools. Teachers who have less experience (or even no experience) of teaching NtE (New to English) pupils will be supported by those staff who are experienced in this area.

Commissioning Centres of Good Practice (CoGP) would formalise the support arrangements between schools and give additional capacity to deliver support for teaching and to accelerate learning.

Application to become a CoGP will be open to all settings/schools and groups of schools and settings in all phases, which have been judged good or outstanding by Ofsted at their last inspection and which can demonstrate good progress and inclusion measures for NtE pupils. (see draft application / proposal form).

Other settings/schools will then be able to access support from the CoGP directly; this could take the form of for example:

- ✓ Focused study visits to classrooms in CoGP
- ✓ Staff from CoGP to visit schools/staff needing support
- ✓ Reviews of practice to be undertaken as a baseline measure
- ✓ Share case studies
- ✓ Provide induction materials
- ✓ Share teaching and Learning materials / strategies
- ✓ Staff training to be provided
- ✓ Governor support
- ✓ Provide proven policies and other written documents as relevant

✓ Establish Specialist Leaders in Education to support other schools

- The proposals will become formal commissions to schools which will be overseen by the new Commissioning Board.
- There will be a maximum of 6 CoGP (hubs), ideally 5 EY / primary and one secondary.
- The board will select the schools or settings from the applications received; giving consideration to geographical demands (see maps).
- The board will monitor and evaluate the progress and impact of the commissions.
- The Lead Officer for the Education Service for New Communities / Travellers and the Lead Achievement Officer will provide support and guidance regarding the strength of the submissions.
- The draft advert with supporting application form and explanatory details will be posted on BSO week beginning 28 September 2015 with an expectation that schools make an expression of interest providing details of the expertise on offer to the LA by 23 October 2015.
- Schools will need to be confident that they can put in place the systems and structures required to begin their commissions with schools from 1 January 2016.
- CoGP (hubs) working in partnership may utilise schools within their partnership/Teaching School Alliance to deliver aspects of expertise.
- The sustainability of the CoGP will need to be revisited by the forum, once the impact of delivery has been evaluated.

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

No additional funding will be required other than a bid to be put forward to the commissioning board to have an initial financial support amount from the 1.246 million already allocated.

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

- To build capacity within a self-improving school system
- To build commercial skills within the school sector
- To build sustainability to provide support for schools across the district
- To close the gap in achievement for underperforming groups

Recommendations

- A maximum of 6 centres of Good practice are established across the district
- The centres are "pump primed" from the Education service for New communities and Travellers, to be ring-fenced for this use by the Commissioning Board
- The centres of good practice will be further supported financially with an initial set up cost of the £1.246M devolved to the Commissioning Board.

List of Supporting Appendices / Papers (where applicable)

- Appendix 1 Draft application form for prospective hub school
- Appendix 2 Draft paper providing details of the expertise a hub school could provide
- Appendix 3 Wording for advert on BSO
- Appendix 4 Maps to show distribution of most recently held data of new arrivals / EU pupils

Contact Officer (name, telephone number and email address)

Jane Arundale, 07582109262, Jane.Arundale@bradford.gov.uk

Draft application form to become a Centre of Good Practice (New Arrivals)

This will be developed into an on-line tool

Please read the supporting guidance before completing the application

Name of school

Geographical location

School is currently judged by Ofsted as good / outstanding

School prioritisation is currently 1 / 2

Teaching and Learning expertise

Please include in the box, the range of expertise you can exemplify and offer to other schools

Specialism

Please indicate the specialism (s) you can offer, adding additional boxes as required

Please support your application with evidence of impact in these areas using details of current pupil progress measures – ROL and in-house exemplification / current inclusion data, i.e. attendance and exclusions

Ability to deliver

Please indicate how you will be in a position to be operational from January 2016

Supporting information

Please find below some information to support schools in identifying whether they are eligible to be a Centre of Good practice (hub school) for supporting schools with "New Arrivals".

What is expected of a Centre of Good Practice?

- To develop a programme of support for schools with children who are New to English and/or New to Education using best practice (possibly traded)
- To establish a process to measure progress which **should include improving the quality of teaching and learning** but may also include specific support in one or more of the following areas-
 - Improving attendance
 - Preparation for Ofsted
 - Support with data management and tracking
 - Working with parents
 - Employing community members in school
 - Behaviour management / cultural awareness strategies
- To provide termly reports to the commissioning board
- To provide an annual written summary of impact including written case studies

What are the essential criteria for Provider Schools?

- Must have Ofsted judgement of good or better
- Must be judged by LA/school prioritisation 1 or 2 and/or
- Demonstrate good pupil progress measures(inc.in- house data) for identified vulnerable groups
- Inclusion data must be positive, i.e. attendance and exclusions
- Must have a positive track record of working with children who are New to English and/or New to Education

What will the LA also need to consider?

- Geographical location; community demographics and school phase will be considered when schools are being selected

What kind of expertise identifies a school as a potential Centre of Good Practice?

Schools and settings may apply to offer **specific support** in one or more of the areas below or may choose to **offer support across all headings**. The number and geographical spread of Centres of Good Practice would be decided by the Commissioning Board.

The headings and details below are purely for exemplification purposes. Please use them if useful in making an application but do not hesitate to include other aspects of support or expertise.

1.Support for the Admission Process

- Admission form completion and ethic self-ascription
- Admission meetings
- School ethos and expectations

2.Support for Attendance

Issues requiring specialist knowledge and support could include:

- Returning to the country of origin in term-time because tickets are cheaper
- Staying at home to interpret for parents
- Staying at home to look after younger siblings
- Attending medical or dental appointments during the day and not coming into school before or after

- Late arrival back into the District in September
- Not having the bus fare
- Family issues
- Communication difficulties. Some parents cannot read and write in any language so will ignore letters concerning attendance even if they are translated
- Some families understand the need to give an explanation for absence on the first day but don't like negotiating the school switchboard
- Cultural differences – funerals and weddings

3.Working with Parents

Schools often state that support is required for the following:

- Language - not just English. Some parents may not be literate in any language so all written communication may fail or be controlled by the pupils
- Parents do not trust the school because of their experience in the country of origin
- Low attendance at parents' evenings
- Parents do not understand school systems

4.Teaching and Learning

Range of advice to be provided on pedagogical approaches:

- What is good EAL practice?
- A pupil is not at L1 and is in KS1 or KS2
- A pupil is not literate in L1 and is in KS3 or 4
- A NtE pupil will only sit with other NtE pupils

5.Behaviour

Advice and support on how to:

- Help pupils to understand what they don't understand
- Build consistency
- Help gain understanding
- Promote anti-bullying
- Improve inclusion
- Support the use of workers from New Communities

6.Exclusions- avoiding exclusion and keeping young people in school through...

- Roles and deployment of key staff in working with "at risk" pupils
- Supportive arrangements with other schools to enhance learning on more than one school site
- Effective engagement with parents from other cultures to support pupils at risk of exclusion

7. Employing Adults from New Communities.

Support and advice could be provided on the following:

- What roles are needed by your pupils and staff?
- How do you let the community know about positions without compromising recruitment policies?
- What should be included in person specifications?
- Training needs
- How will the post holder be line managed?
- If a worker is deployed across several schools how will that be managed?

8.Promoting involvement in extracurricular and out-of-hours activities.

Support and advice could be provided on the following:

- Home finance
- Late arrival home
- Safety worries
- Unfamiliarity with off site visits/venues
- Parental confidence

9.Other

Schools may also need support in areas such as transition; working with other agencies; translators and interpreters; managing data and Ofsted inspections.

Draft advert for Centres of Good Practice (New Arrivals)

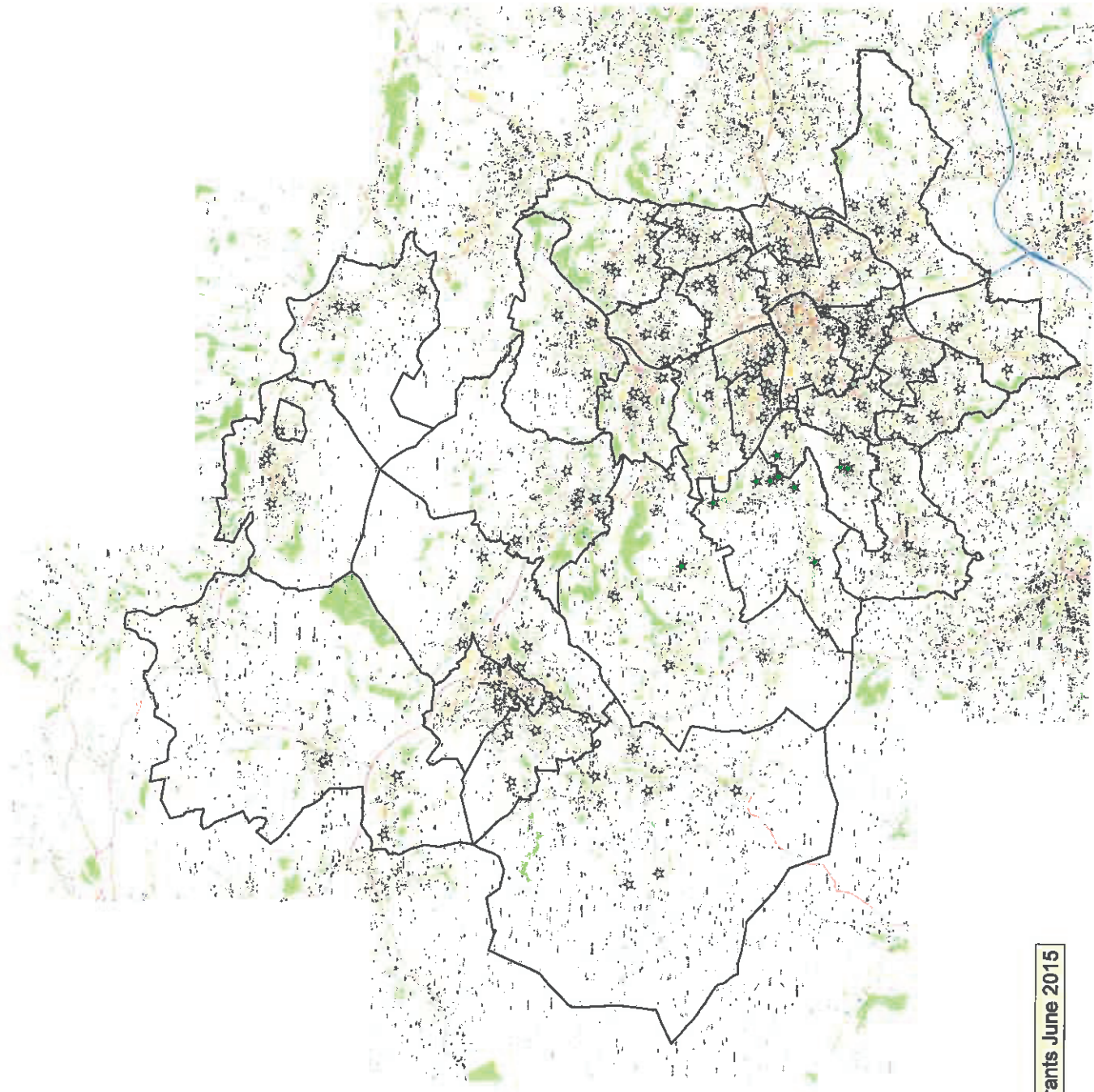
Do you have a proven track record in raising achievement for pupils who are New to English / New to education, particularly EU migrants / Refugees / Asylum seekers?

Could you offer formalised support through commissions with schools seeking support with New Arrivals?

Can you mobilise your expertise by 1 January 2016?

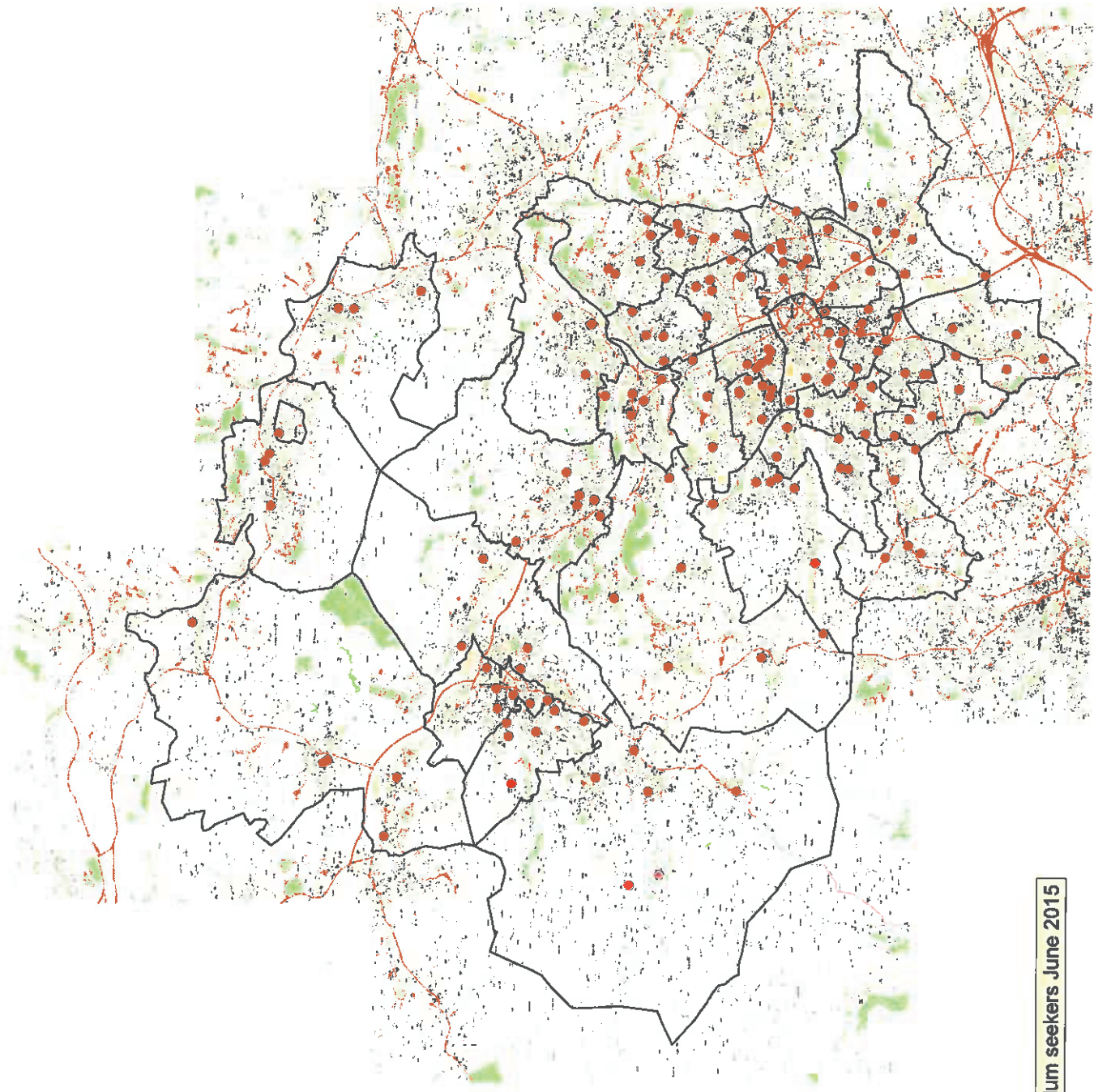
Please see the attached supporting information and application form for the criteria and details on how to apply.

Migrants in Schools June 2015



☆ Migrants June 2015

Asylum Seekers in Schools June 2015



● Asylum seekers June 2015

SCHOOLS FORUM AGENDA ITEM

For Action

For Information



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

To provide the Schools Forum with an early **indicative** view of the 2016/17 Dedicated Schools Grant position and cost pressures, which the Forum will have to consider in making final recommendations in January 2016.

Date (s) of any Previous Discussion at the Forum

This is the first time the 2016/17 DSG position has been directly discussed with the Schools Forum.

Background / Context

In July 2015, we reported an indicative additional one off DSG sum of £2.141m that is likely to be available for the Schools Forum to allocate as part of its 2016/17 budget setting processes. A further report on one off monies will be presented in December; this report focuses on the on-going DSG financial position.

Forum members will recall previous messages that have been given about the longer term trend of increasing cost pressures within the DSG, especially within the High Needs Block. Members are reminded of the strategic discussions currently taking place on how we can best meet the growth in ASD need across the District. Members are reminded also of the discussions and information presented in recent meetings about the type and extent of cost pressures currently within primary and secondary budgets and pressures in maintained early years provisions. The position of the DSG in 2016/17, and over the next 5 years, needs to be viewed in the context of the circa 12% growth in real terms pressure in delegated budgets brought about especially by increases in employer costs over 2015-17. The Forum must also have a mind towards the introduction of the National Funding Formula.

Within the papers for other agenda items of this meeting, Members will be aware of the anticipated move to a National Funding Formula (NFF) in 2017, with 2016/17 being a stand still year. By stand still:

- DSG per pupil rates of funding (Schools Block and Early Years Block) are expected to remain at 2015/16 levels (cash flat). The Schools Block rate has been confirmed at cash flat
- The DfE has said in its guidance that authorities cannot claim additional funding for additional places and that increases in High Needs Block funding for demographic growth are unlikely i.e. Bradford will not receive any further HNB funding on 15/16 levels
- The cost of expansion of newly established academies will need to be fully met from the 2016/17 Schools Block. Our indicative modelling indicates an additional cost to our DSG in 2016/17 of £1.34m. We have the option to reduce the impact to £827,000 by using one off monies to fund the expansions that cease after 2016/17 and we would recommend that the Forum does this.
- The Minimum Funding Guarantee is set again at minus 1.5%

As an Authority that quite likely to see a reduction in DSG funding as a result of the NFF, quite possibly across all 3 DSG Blocks, we must be very careful about the extent to which we increase our levels of expenditure in 2016/17. A 1% reduction across our DSG equates to £5m in cash terms. We might expect to see reductions greater than 1%. However, nothing has been announced by the DfE yet and this advice comes from analysis of the direction of travel indicated by previous DfE announcements and calls for evidence. We anticipate further announcements from the DfE on the NFF shortly. Responding to the implications of the NFF will become the Forum's main piece of work in 2016. The Forum and the Authority must think about how the 2016/17 DSG is set in the NFF context.

Details of the Item for Consideration

Please see Appendix 1, which give an indicative forecast of the position of the 2016/17 DSG, based on current information. Please note that a good deal of this forecast is ESTIMATED at this stage. The picture will firm up as we get towards December e.g. following the completion of the October 2015 Census and the High Needs Block places setting exercise, following consultation on the continuation of central funds and contingencies and after working groups have finalised their recommendations.

Details of the Item for Consideration (continued)

In summary, the INDICATIVE forecast identifies a funding gap within the DSG of around £1.3m in 2016/17. The clear cause of this gap is pressures in the High Needs Block. Members will be able to identify in section g) the impact of additional individual cost pressures.

The actual position will move from this estimate. But, at the very least at this stage, the forecast suggests that the position (again, and as we would expect) will be difficult, with the requirement to reduce existing budget allocations to balance the DSG. Following the warning given above, we must be very careful about the extent to which we increase our levels of expenditure in 2016/17, when it is possible that the NFF in 2017 will reduce our DSG. The Forum will be required to make final recommendations, including how to best manage expected cost pressures, at the meeting on 6 January 2016.

This forecast makes the following key assumptions:

- That the additional DSG Schools Block resource that we will receive from having a greater number of children recorded in the October 2015 Census in Primary and Secondary schools and academies (+ 1,145 estimated) will meet the cost of formula funding and will also provide an additional £0.94m headroom.
- That the Schools Forum, understanding the expected move to the National Funding Formula at April 2017, and the possible negative impact of this, will wish to keep as 'stand still' a position as possible in 2016/17 in terms of the total level of on-going expenditure within the DSG, responding only to essential / critical pressures. This does not preclude the movement of funding between budgets within the DSG, on the basis that any movement will be cost neutral. The Forum will wish to review this.
- That the Forum will wish to keep the values of all formula variables (including with the High Needs Block 7 ranges system and Early Years Funding Rates) the same in 2016/17 as in 2015/16. This however, given the pressures with the DSG and the estimated funding gap, may not (is likely not to) be achievable and the Forum will wish to review this.
- That the resources within the Early Years Block will be sufficient to meet the allocations to providers from the Single Funding Formula. That the resources allocated for the development of the 2 Year Old offer remain ringfenced i.e. not diverted for another purpose within the DSG. The Forum will wish to review this, to ensure that the impact of one off balances is maximised.
- That £200,000 of the one off balances relating to the development of the 2 year old offer will be allocated to the Early Years Inclusion Panel to support SEND in early years settings in 2016/17.
- That actual spending in 2015/16 in total is in line with the planned budget set by the Forum at the start of the year. Our latest forecasts suggest this is a reasonable assumption, although there are specific pressures that must be watched, including in the cost of placements in independent schools.
- That the total number of commissioned / funded high needs places in Bradford providers in 2016/17 will not exceed the total number funded for the 2015/16 academic year (understanding that the 16/17 DSG will be required to meet full year cost where places were increased at September 2015). A further report on commissioned places and the position of the High Needs Block will be presented to the Forum in October. Please be aware that this forecast does not provide budget for any further increases in places during 2016. We are already aware that this may not be a sustainable position, in terms of meeting pupil need, and this will need to be discussed further.
- That the DSG will meet the increased cost of independent places (secondary behaviour support) in 2016/17 (approx. £500,000) but that this will be funded by reducing the number of places funded in Bradford PRUs, according to the principles that were discussed and agreed with the Schools Forum in December 2013 (in establishing a maximum number of places that the DSG will fund).
- That the Forum will be satisfied to continue a level of contribution from the Schools (£3.63m) and Early Years (£0.34m) Blocks to High Needs Block pressures.
- That the cost of expansion (growth) in the primary phase starts to decrease at the same time as expansion begins in the secondary phase. The forecast assumes a new cost of circa £300,000 in the secondary phase from September 2016.
- That the Forum will wish to use a proportion of one off monies to reduce the cost to the Schools Block of providing for the expansion of newly establishing academies, from £1.34m to £0.83m.
- That the DSG's contribution to the Building Schools For the Future Affordability Gap will need to increase by 2% (for RPIX) in 2016/17. This will need to be reviewed in February 2016.
- That the cost of rates in primary and secondary academies will increase by circa. 9% in 2016/17. This is based on the average cost increase over recent years. This will need to be reviewed for better estimates to be calculated at the beginning of January 2016.

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

This is an item for information only at this stage, but the content of this report has direct implications for the 2016/17 DSG – as outlined in Appendix 1

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

This is an item for information only

Recommendations

The Schools Forum is asked to consider and to note the overview provided.

List of Supporting Appendices / Papers (where applicable)

Appendix 1 – Early Projection of the 2016/17 DSG and Cost Pressures

Contact Officer (name, telephone number and email address)

Andrew Redding, Business Advisor (Schools)

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Early Projection of 2016/17 Dedicated Schools Grant and Cost Pressures

	Schools Block	Early Years Block	High Needs Block	Total
<u>2015/16 Position</u>				
a) 2015/16 DSG (before Academy recoupment) at 16 July 2015 with estimated Early Years Jan 2016 adjustment	410,646,000	40,786,558	45,849,333	497,281,891
b) Planned Expenditure 2015/16 (set before the start of the year), adjusted for changes in 2015/16 DSG *	407,019,046	40,447,016	50,136,828	497,602,890
c) Difference (Pressure) (a-b) (negative = overspend)	3,626,954	339,542	-4,287,496	-321,000
<u>2016/17 Forecast</u>				
d) <u>Anticipated additional DSG income in 2016/17:</u> For additional children recorded in the October 2015 Census (Primary and Secondary)	5,309,264			
e) Total Anticipated DSG 2016/17 <i>Additional income (RISK)</i>	415,955,264 <i>5,309,264</i>	40,786,558 <i>0</i>	45,849,333 <i>0</i>	502,591,155 <i>5,309,264</i>
f) <u>Anticipated savings to the DSG in 2016/17:</u> Reduction in cost of growth / expansion in the Primary Phase Release back of anticipated underspending in Growth Fund 2015/16 (one off)	-496,694 -235,741			
g) <u>Anticipated additional costs to the DSG in 2016/17 above 2015/16 levels</u> Formula funding for additional children recorded in the October 2015 Census (Primary and Secondary and Early Years) Cost of growth in the former non recoupment academies and free schools (Primary and Secondary) ** net of one off monies Start of growth funding in the Secondary Phase Cost of inflation on the Building Schools For the Future DSG Affordability Gap (estimated at 2%) Estimated increase in the cost of Rates Estimated increased spend in Special School provision (full year impact of Sept 2015 places increases & Oastler School) Estimated increased spend in DSPs (including full year impact of Sept 2015 places and cost of Early Years Resourced) Year on year growth in cost of mainstream SEND Statements / EHCP (including SEN Funding Floor) Growth in cost of OLA, independent and NMSS placements during 2015/16 DSG adjustment for NMSS placements change to residency funding Anticipated change in spending in placements in FE provisions Anticipated change in spending on placements in PRUs (incorporating the full establishment of capping places)	4,368,600 827,349 300,000 112,240 450,000	39,986	13,560 275,110 223,260 286,720 500,000 80,000 -70,000 -389,000	
h) Total Anticipated Net Position Costs vs. Savings in 2016/17	5,325,754	39,986	919,650	6,285,390
i) Anticipated 2016/17 DSG Position (Pressure) (negative = overspend) (e-b-h) <i>Change in Cost Pressure (negative = increase in cost pressure)</i>	3,610,464 <i>-16,490</i>	299,556 <i>-39,986</i>	-5,207,145 <i>-919,649</i>	-1,297,125

* please note that current forecasts suggest that TOTAL actual DSG spending in 2015/16 will be in line with the planned budget

Details of the Item for Consideration

The Early Years Working Group (EYWG) met on 10 September and discussed the operation of the Early Years Single Funding Formula (EYSFF) in 2016/17. The Group also discussed introducing monthly payments for PVI Settings from April 2016.

The EYSFF for 3 and 4 year olds

Following discussion, it was agreed by the EYWG that, due to the impending implementation of a National Funding Formula, no change was required to our EYSFF, and that our existing approach for 3 and 4 year olds should continue in 2016/17. The full consultation document, including the proposed technical statement for the operation of the EYSFF in 2016/17, is shown in Appendix 1. The values of funding rates shown in the technical statement are indicative only at this stage, and are currently based on 2015/16 rates.

Change to monthly payments for PVI Settings

PVI settings are currently paid a lump sum at the start of each term. A consequence of this is the risk of overpayment to settings that close during the term, or where actual numbers are significantly less than the estimated numbers the funding for the setting has been based on. The Authority has encountered difficulties recovering overpayments from closed settings.

Moving to a monthly payment mechanism will reduce the risk of overpayment, as payment can be ceased or revised at any point in the year and not only at the start of the next term as is currently the case. A move to monthly payments will also streamline current working practices and increase efficiency as the monthly payments to PVI settings will be aligned and included within the payment system currently in place for maintained schools and academies. Full details of the change and proposed mechanism for payment can be found in the consultation document and within the technical statement. Provided that payments are made in advance, the EYWG was very supportive of this proposal.

Details of the Item for Consideration

The Schools Forum will be asked to consider the values of EYSFF rates for the 2,3 and 4 year old entitlements in the January 2016 meeting, once our overall level of DSG is known, and when a more accurate assessment of take-up of funded hours (based on the termly numbers for the current 2015/16 financial year) can be calculated. It should be noted that the Minimum Funding Guarantee (MFG) of -1.5% applies to the EYSFF Base Rates, so the maximum reduction that could be applied to the base rate would be 1.5% of the 2015/16 value for each type of provider. Please be aware that this MFG does not apply to deprivation rates.

The DfE's 2014/15 Early Years Benchmarking Tool shows that, as has been discussed by the Forum on a number of occasions, our DSG delegated funding for the 3 and 4 year old entitlement continues at a much higher value than the average of our statistical neighbour authorities - an additional £5.3 million on the free entitlement for 3 and 4 year olds in 2014/15. This higher spend is the result of deliberate decision by the Schools Forum to support early intervention and to enable providers to drive forward improvements in outcomes for children from the start of their education. Within this £5.3 million additional spend, our total spend in 2014/15 on nursery classes attached to primary schools was £2.4 million higher than our statistical neighbour average. We also see higher spend in the Private, Voluntary and Independent (PVI) sector (£2.6m), with our spending on nursery schools slightly higher than the statistical neighbour average (£170k) This is a change from the findings in 2013/14 where our spending was slightly lower than statistical neighbour average in nursery schools.

The key question for the Schools Forum and the Local Authority is how this additional spending is impacting on the acceleration of educational outcomes in the Bradford District. Summer 2015 results will be presented to the Forum at the next meeting for consideration. Benchmarking data for 2015/16 will be available from 24 September and the comparison of average hourly rates to those of our statistical neighbours will be undertaken again and the findings reported back to Schools Forum.

The extension of the free entitlement for eligible 2 year olds

Free early education became a statutory entitlement for eligible 2 year olds from 1 September 2013. Eligible children are defined as children who are looked after and children who meet the Free School Meals eligibility criteria. The programme was extended from September 2014 to include around 40% of 2 year olds.

The EYWG and Schools Forum have previously considered various options to fund the free entitlement for 2 year olds. In 2015/16 these places were funded on a flat rate of £4.85 per hour, with no differentiation for different types of provision. Child numbers were counted and funded in the same way as for 3 / 4 year olds – based on participation recorded at individual settings in the termly censuses, but incorporating a second headcount each term. This second headcount identifies the most vulnerable children that don't arrive neatly at the start of term (especially the autumn term when the census is taken early in October) and also has supported the adequate funding of settings where there has been some slippage in the timescales of capital buildings programmes. The second headcount supports meeting the key outcome, which is to secure sufficient places on a participation-led funding basis.

It is proposed that this approach to counting numbers is continued in 2016/17, with funding allocated at a single flat rate per hour, indicatively £4.85 for all children. The Funding Regulations will now only permit a single flat rate to be used to allocate funding for the 2 year old offer.

The Forum will recall that a one off sum of £2.45m is held within the DSG, carried forward from 2014/15, to support the development of the 2 year old offer. This sum represents the underspending in resources that have been specifically added to our DSG by the DfE. The Forum has previously taken the view that these resources should earmarked for the 2 year old offer, rather than be recycled for other purposes. This position was discussed by the EYWG and it is recognised that the development of the 2 year old offer is such that not all the £2.45m can be effectively spent; that some of this can be recycled back to the DSG for re-allocation. Indicatively, removing forecasted spend in this year, the EYWG recommends that £600,000 is held for development work taking place after April 2016, with a sum of £500,000 (to be confirmed) potentially available to be distributed back to the DSG. The Forum will be asked to further consider this in making recommendations on the 2016/17 DSG in January 2016. The EYWG also recommends that this DSG budget is used to provide some resource for detailed work to take place on the impact of the 2 year old offer. EYWG members believe, from their own experiences, that the 2 year old offer is having a positive impact on the school readiness of children.

Other Areas of Discussion

EYWG discussed the flexibility of the offers delivered by maintained schools and the challenges faced in responding to parental demand and, ultimately, in delivering the planned increase to 30 hours free entitlement for working parents. Forum members have previously expressed concern that the limited flexibility in maintained schools is affecting early years numbers and is causing financial stress. A report will be presented to Schools Forum at the next meeting, which will provide case studies of the development of flexibility and will outline the further support and guidance that is available for maintained schools in developing their offers.

A Note on the Early Years Pupil Premium (EYPP)

Early Years Pupil Premium Grant was implemented in April 2015 as planned and continues in 2016/17. This is intended to support closing the funding gap between the additional support disadvantaged children receive at ages 2, 3 and 4 and the additional support they then receive in school from the existing school-age Pupil Premium. To date, the LA has not received notification of changes to funding rates. Therefore providers should base estimates on the 2015/16 rates of up to £300 per year, or £0.53 per child per hour, for each eligible child.

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

Funding of the free entitlement for 2, 3 and 4 year olds in early years settings is identified within the Early Years Block of the DSG. Participation-led funding was introduced in April 2015 and so the Early Years Block of the DSG will be calculated on the basis of January Census data for 2, 3 and 4 year olds.

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

The District's key strategic aims are to:

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

This item supports the improvement of the school readiness of children and early year's outcomes.

Recommendations

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

List of Supporting Appendices / Papers

Appendix 1 - Consultation on the Bradford District Early Years Single Funding Formula 2016/17

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

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Consultation - Bradford District Early Years Single Funding Formula 2016/17

Introduction

This is a statement for consultation, which summarises the basis on which the Local Authority proposes to fund settings across the Bradford District for the delivery of the 2, 3 and 4 year free entitlements to nursery provision in the 2016/17 financial year, using the Early Years Single Funding Formula (EYSFF).

Please read this summary alongside the [timetable document](#), which is attached as an appendix.

No regulatory changes are being made by the DfE to the operation of the EYSFF in 2016/17 and the Authority continues to have flexibility at a local level to agree our own funding approach.

Therefore, following discussion with the Early Years Working Group and the Schools Forum, the Authority proposes to use the same approach to the calculation of funding allocations for the 2016/17 financial year as used for 2015/16.

The Authority does propose however, to change the way funding is paid to Private, Voluntary and Independent Providers, so that funding is paid, from April 2016, on a monthly advances basis. This proposal is explained further below. Please note that this does not change how funding allocations are determined, just how these allocations will be physically paid to providers. Maintained schools and academies are already paid on a monthly advance basis and the Authority intends to continue the current methodology.

Additional Important Information

a) National Funding Formula

The DfE has signalled the intention to move to a National Funding Formula (NFF). We await further announcements, which will confirm the implementation timescale and what the DfE proposes the NFF will be. We anticipate, based on recent announcements, that implementation will take place from April 2017. We expect more detailed consultation shortly on this, which will enable us to assess the extent to which our current funding approaches will change and the implications on individual settings. The key aspect of a national formula, which will have an impact on funding in the District, is the value of hourly rates that are set, recognising that we currently fund the 3 and 4 year old free entitlement at a higher hourly rate than the basic national average and the average of our statistical neighbour authorities. A NFF may mean a reduction in funding for Bradford Early Years settings if the national rate is set near to the current national average. For awareness, Bradford's 2014/15 per hour funding rates for the 3 and 4 year old free entitlement were greater than our than the median average of our statistical neighbours as follows:

➤ PVI Providers	+£1.30
➤ Classes	+£0.76
➤ Schools	+£0.42

The DfE however, has recently published a 'call for evidence' asking for feedback from authorities and early years providers on the sufficiency of funding rates nationally, responding in particular to widespread concern that the extension of the free entitlement to 30 hours for working parents will not be deliverable on current funding rates. The Government has made a commitment to increase national early years funding rates. It is realistic therefore, to anticipate that a future NFF funding rate would be set at a level higher than current national averages.

b) Extension of the free entitlement to 30 hours for working parents

The Government has announced plans to raise the free entitlement for 3 & 4 year olds from 15 hours per week to 30 hours per week where both parents are working either part time or full time for the equivalent of 8 hours per week at the national minimum wage. This will be piloted in some areas from September 2016 with full implementation planned from September 2017. Bradford has expressed an interest in being a pilot authority. We will not know until later in the year if we have been selected.

c) Other Information

Please be aware that the hourly base rates shown in the technical statement are indicative only at this stage and will not be confirmed until the Schools Forum makes recommendations on the overall budget in January. The indicative base rates shown are the 2015/16 rates. Settings should be aware that, due to overall DSG budget pressures, it may be possible to retain a cash flat position in 2016/17.

The Minimum Funding Guarantee (MFG) will continue to be applied to EYSFF Base Rates in 2016/17. This means that, was the Schools Forum to decide to reduce base rates in 2016/17 to manage DSG affordability, then the maximum reduction would be limited to 1.5% of the indicative base rate values shown in this draft technical statement. Please be aware that deprivation rates are not covered by this MFG.

All funding relating to Early Years SEN resourced provisions is excluded from the operation of the Early Years Single Funding Formula. Settings will not receive EYSFF funding for children placed in resourced provision. Instead, settings will be funded via the High Needs Place-Plus model.

We expect the Early Years Pupil Premium to continue in 2016/17. However, the DfE has still to confirm rates of funding. At this point providers should base estimates on the 2015/16 rates of up to £300 per year, or £0.53 per child per hour, for each eligible child. Paragraph k in the Technical Statement gives further information.

Proposed Move to Monthly Advances – PVI Providers

Currently, although funding allocations for maintained schools and PVI providers are calculated on the same basis, allocations are paid differently. In simple terms, the Local Authority makes payments to maintained schools and academies according to a well-established monthly profile, so that schools receive funding in 12 instalments. These instalments are referred to as 'advances'. Payments are made to PVI providers on a termly lump sum basis, at the start of each term, with adjustments made to the next term's payment for any over or under payment relating to the previous term.

A consequence of making payments at the start of each term is that settings that close during the term, or settings that have significantly reduced number from those originally estimated, are overpaid, with subsequent recovery. The Local Authority has encountered difficulties with recovering overpayments. This includes additional time chasing settings for repayment, but also, over the last 12 months, the Authority has been unable to recover amounts from some closed settings, resulting in debt charges to the DSG. In seeking to avoid this, but also recognising the significant operational advantages, for both the Authority and providers, we propose to move to a system of monthly advances for PVI providers, from April 2016.

The outline of the Authority proposal is shown below, and in the attached technical statement. We welcome feedback from PVI providers on the details of how a monthly advances system can be effectively operated.

In overview:

- Initial payment figures for each term will be calculated using Confirmed Indicative Budgets, as they are now.
- From these, 12 'standard' advances will be calculated for payment between April 2016 and February 2017, with 2 payments to be made in April 2016. The first April payment is the April payment and will be

paid into bank accounts on or around 7 April 2016*. The second April payment is the May payment and will be paid into bank accounts on or around 22 April 2016*.

- Subsequent payments will be paid monthly in advance into bank accounts between 21 and 25 of each month*. A payment schedule detailing the monthly payments dates will be available in April 2016.
- Settings will have received their 12th standard monthly advance in February 2017, with a further 13th payment in March only being made where funds are still owed following the confirmation of the January Census numbers.
- Where a PVI setting experiences exceptional cash flow difficulties, they should contact the Local Authority to discuss the matter further. Contact details can be found in Section 3 of this document

The proposed framework by term is as follows:

- **Summer Term** funding from the Confirmed Indicative Budget is divided by 5 (no. of months in term) for 5 equal payments to be made between April and July.
- 2 payments are made in April, firstly for April and then for May. Payments for the remaining 3 months of summer term will be paid in May, June and July respectively.
- Any positive or negative adjustment following the re-calculation of funding using May Census actual numbers will be added to or deducted from the July advance.
- Where the July advance is insufficient to recoup the full value of any negative adjustment, the August advance will also be reduced. Where a negative balance is still outstanding after this, a deduction will be made from September advance.

- **Autumn Term** funding (either from the Confirmed Indicative Budget or from a revised calculation where the Authority has been notified of a change in numbers) is divided by 4 (no. of months in term) for 4 equal payments to be made between August and November.
- The payment for September will be made in August, with payments for the remaining 3 months of the term made in September, October and November.
- Any positive or negative adjustment following the re-calculation of funding using the October Census actual numbers will be added to or deducted from the November advance.
- Where the November advance is insufficient to recoup the full value of any negative adjustment, the December advance will also be reduced. Where a negative balance still outstanding after this, a deduction will be made from January advance.

- **Spring Term** 80% of spring term's funding (either from the Confirmed Indicative Budget or from a revised calculation where the Authority has been notified of a change in numbers) is divided by 3 (no. of months in term) for 3 equal payments to be made between December and February.
- The payment for January will be made in December, with payments for the remaining 2 months of the term made in January and February.
- Any positive adjustment following the re-calculation of funding using the January Census actual numbers will be paid in a single additional payment at the end of March. This payment will include any funds owed from 20% of the termly amount being withheld from the initial advances calculation.
- A setting that has still been overpaid, after the 20% that was withheld from the initial calculation has been taken into account, must repay the value of overpayment by cheque by **30 April 2017**. Where a cheque is not received by 30 April 2017, the Local Authority will deduct the value of the outstanding overpayment from the next available monthly advance in the summer term. This is likely to be in May 2017.

* Please note that all dates are subject to confirmation.

An example of how the payments and adjustments will be calculated and applied:

TERMLY FUNDING TAKEN FROM CONFIRMED INDICATIVE BUDGET	135,000.00
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FUNDING FOR SUMMER TERM	60000
Standard Payment	12000

FUNDING FOR AUTUMN TERM	45000
Standard Payment	11250

80% of spring term funding used to calculate standard monthly payment. 20% withheld for March payment / adjustment

FUNDING FOR SPRING TERM	30000		
80% of spring term funding	24000	20% Withheld	6000
Standard Payment	8000		

Where NEGATIVE adjustment due for May census

Paid in :	Payment relates to month of:	Value of payment	Adjustment for May census	Revised Payment for July only
April	April	12000		
April	May	12000		
May	June	12000		
June	July	12000		
July	August	12000	-10000	2000
TOTAL FUNDING PAID FOR SUMMER TERM				50000

Where NEGATIVE adjustment due for October census

Paid in :	Payment relates to month of:	Value of payment	Adjustment for October census	Revised Payment for November only
August	September	11250		
Sept	October	11250		
Oct	November	11250		
Nov	December	11250	-9000	2250
TOTAL FUNDING PAID FOR AUTUMN TERM				36000

Where NEGATIVE adjustment due for January census

Paid in :	Payment relates to month of:	Value of payment	Adjustment for January census	Revised Payment for March only
December	January	8000		
Jan	February	8000		
February	March	8000		
March	20% withheld	6000	-7000	0
Not recouped from 20% withheld				-1000
TOTAL FUNDING PAID FOR SPRING TERM				24000
Value to be repaid by cheque by 30 April 2016				-1000

TERMLY FUNDING TAKEN FROM CONFIRMED INDICATIVE BUDGET	79,000
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FUNDING FOR SUMMER TERM	35000
Standard Payment	7000

FUNDING FOR AUTUMN TERM	26000
Standard Payment	6500

80% of spring term funding used to calculate standard monthly payment. 20% withheld for March payment / adjustment

FUNDING FOR SPRING TERM	18000		
80% of spring term funding	14400	20% Withheld	3600
Standard Payment	4800		

Where POSITIVE adjustment due for May census

Paid in :	Payment relates to month of:	Value of payment	Adjustment for May census	Revised Payment for July only
April	April	7000		
April	May	7000		
May	June	7000		
June	July	7000		
July	August	7000	8000	15000
TOTAL FUNDING PAID FOR SUMMER TERM				43000

Where POSITIVE adjustment due for October census

Paid in :	Payment relates to month of:	Value of payment	Adjustment for October census	Revised Payment for November only
August	September	6500		
Sept	October	6500		
Oct	November	6500		
Nov	December	6500	6000	12500
TOTAL FUNDING PAID FOR AUTUMN TERM				32000

Where POSITIVE adjustment due for January census

Paid in :	Payment relates to month of:	Value of payment	Adjustment for January census	Revised Payment for March only
December	January	4800		
Jan	February	4800		
February	March	4800		
March	20% withheld	3600	2000	5600
TOTAL FUNDING PAID FOR SPRING TERM				20000

If you wish to provide feedback on the proposal to move to monthly payments for PVI provider, or on any aspect of the proposed funding approach for 2016/17, please contact the following officers:

- **Maintained settings:** Dawn Haigh, 01274 433775, Dawn.Haigh@bradford.gov.uk
- **PVI settings:** Jaclyn McManus, 01274 431965, jaclyn.mcmanus@bradford.gov.uk
Samantha Padgett, 01274 431386, Samantha.padgett@bradford.gov.uk

The deadline for responses is Friday 16 October 2015

Responses to this consultation will be considered by the Schools Forum at its meeting on 22 October 2015.

Bradford District Early Years Single Funding Formula 2016/17
(DRAFT AUTUMN 2015)

1) The Basic Early Years Single Funding Formula (EYSFF) for 3 and 4 year olds in 2016/17 is:

$$(a + b) \times c + (d + e) = \text{Total EYSFF Funding 2016/17}$$

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

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

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

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

d) Funding for Sustainability (where applicable)

e) Funding for Children Looked After (where applicable)

For example, assuming that all children at a setting take 15 hours entitlement per week for 38 weeks per year, funding using the EYSFF in 2016/17 will look like:

a) Setting Base Rate	£4.13	** Classes Base Rate
b) Setting Deprivation & SEN Rate	£0.37	** illustrative only

$$\text{The setting's funding rate} = (£4.13 + £0.37) = £4.50$$

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

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

$$\text{Sub Total EYSFF Funding} = £4.50 \times 39,660 = £178,470$$

d) Sustainability £0

e) Funding for Children Looked After £1,000

$$\text{Total EYSFF Funding} = £178,470 + £0 + £1,000 = £179,470$$

2) As in 2015/16, the 2 year old offer in 2016/17 will be funded via a simple flat rate. The value of rate for all providers is indicatively set at £4.85 per child per hour. Funding will be calculated on a termly count of children, in the same way that participation is calculated for 3 and 4 year olds, but incorporating a 2nd headcount date.

SECTION 1**a) There are 3 'Setting Base Rates' for 3 and 4 year olds in 2016/17:**

Type of Setting	Indicative Base Rate Value
Maintained Nursery Schools <i>*includes £0.06 for school meals and kitchen repairs</i>	£5.71*
Maintained Nursery Classes in Primary Schools Nursery Classes in Academies	£4.14
Private, Voluntary & Independent (PVI) Settings, including Childminders	£4.63

- The Base Rates are expressed as values of funding per child per hour. These rates are calculated on a 'needs-led' basis, reflecting the actual costs of delivery of the free entitlement and that these costs are different for different types of setting.
- All settings of the same type are funded on the same Base Rate.
- The Base Rates are fixed at the point the 1st draft of Indicative Budgets are published, which for 2016/17 is in February 2016 (please see the [timetable](#)).
- For Primary schools with Nursery classes, funding allocated to support whole school costs remains fully within the Primary school funding formula (e.g. rates).

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

- All Local Authorities are required by the Department for Education (DfE) to have a deprivation factor within their EYSFF. This funding is allocated, in addition to the Base Rates, specifically to:
 - Support raising the educational outcomes and life chances of children from more deprived backgrounds
 - Support the reduction of the attainment gap that currently exists between children from more deprived and children from more affluent backgrounds
 - Support settings for the additional costs associated with the delivery of the free entitlement to children from more deprived backgrounds and to children that have additional lower level educational needs (Early Years Action, Early Years Action +).
 - Please note that this funding does not replace the provision and processes in place within the Bradford District to support children with higher level special educational needs.
- As with the Base Rates:
 - A setting's 'Deprivation & SEN Rate' is expressed as a value per child per hour,
 - These rates are fixed at the point the 1st draft of Indicative Budgets are published, which for 2016/17 is in February 2016,
 - All hours delivered at a setting are funded at the same Deprivation and SEN Rate.

- Unlike the Setting Base Rates, Deprivation and SEN Rates vary according to the measured level of deprivation of children attending each setting. Each setting's Deprivation and SEN Rate is calculated using the Index of Multiple Deprivation and the postcodes of children taking up the free entitlement at the setting, recorded in the January 2016, January 2015 and January 2014 censuses (3 year rolling average). Because of the time lag in data, the Local Authority appreciates that using this approach may produce some anomalous funding results, especially for smaller settings. We will keep this approach under review.
- Rates of funding have been calculated, based on the estimates of funded hours delivered used to calculate the Indicative Budgets, using the Index of Multiple Deprivation (IMD) scores linked to individual children's postcodes. Where this data for an individual setting cannot be properly determined or is not available, and for settings that newly establish during the year, the setting's deprivation rate will be calculated using the average IMD scores for all providers of this type. This is especially applicable for Childminders.

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

- Each setting's no. of funded free entitlement hours delivered for the 2016/17 financial year is the sum of:
 - Summer term (beginning 1 April 2016): the total of free entitlement hours delivered per week recorded in the census taken on 19 May 2016, x 12 weeks
 - Autumn term (beginning 1 September 2016): the total of free entitlement hours delivered per week recorded in the census taken on 6 October 2016, x 14 weeks
 - Spring term (beginning 1 January 2017): the total of free entitlement hours delivered per week recorded in the census taken on 19 January 2017, x 12 weeks
- 'Hours delivered' are the free entitlement hours children are registered to take at that setting, taken from the contracts signed with parents for that term. 'Hours delivered' is not affected by the actual attendance of children at the time the censuses are taken.
- The dates for the censuses are the same for both maintained and PVI settings. The dates are those set by the DfE for the maintained termly censuses. One of the reasons for this is so that the census data for each setting can be cross checked to identify duplicate children.
- For maintained schools, the free entitlement hours information will be taken by the Local Authority from the data recorded in the "funded hours" field in the censuses, which schools submit to the DfE via the COLLECT website. PVI settings will be required, as is the process now, to complete a pre-populated form and to return this directly to Bradford Council EYCP via Bradford Schools Online.
- Adjustments will be made to the funding of settings that open or close (or cease to deliver free entitlement hours) mid-term, to reflect the proportion of the term applicable.
- No adjustment will automatically be made to funded free entitlement hours for starters or leavers after the census date in each term. However, exceptional circumstances can be considered where a setting admits a significant number of children after the census has been taken that term. Please see paragraph i below.
- An adjustment to funded hours delivered will be made specifically for the autumn term only, recognising that in this term the intake of children into nursery provision is often staggered into maintained settings and that eligible children may start the term at a PVI setting and then move to a maintained setting before the October census. Where a child started the autumn term at a PVI setting and has moved to a maintained setting prior to the October census, an adjustment will be made to split the funding for the autumn term, based on the number of weeks that a child has attended each setting. This adjustment applies for the autumn term only.

- For the purposes of calculating Indicative Budgets for all settings before the start of the financial year, estimates of the funded free entitlement hours that will be recorded in each of the censuses will be used. Adjustments will then be made in year, where actual numbers are different from these estimates. Please see paragraph e below.
- PVI settings, please note that, due to the very tight timescale for processing information, the count of funded free entitlement hours from the January 2016 census, which will be used to calculate 1st draft Indicative Budgets, will be taken from the census summary each setting provides, rather than from the full census return. If this summary is obviously incomplete or incorrect, the Local Authority will use the count from the January 2015 census. Settings will of course be able to revise the estimates before the Confirmed Indicative Budgets are published. Providers are required to complete the 'Update to Termly Estimates Form' issued by Bradford Council in order to revise the estimates used in the indicative budget. Providers must provide a valid reason for the amendment in order for the revision to be considered and applied.

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

- The EYSFF for 3 and 4 year olds will only allocate funding for children in settings that are accessing the free entitlement from the term after their 3rd birthday. The 1 September, 1 January and 1 April are taken as start dates for each of the terms. The offer has been extended to eligible 2 year olds, but this does not mean all children accessing provision under aged 3 are eligible for EYSFF funding.
- The maximum number of hours any child will be funded for is 15 hours per week. This is the same for any child regardless of their age, so a four or five year old child staying in nursery (rather than starting Reception) will only be funded for 15 hours per week, unless funding for the additional 10 hours is specifically agreed with the Local Authority.
- Full Time Places have now ceased to be funded.
- Although a child can take up their entitlement over two settings, the maximum entitlement is still the equivalent of 15 hours per week over 38 weeks per year. Where a child attends two settings, the Local Authority will fund each setting on a pro-rata basis only up to a maximum of 15 hours. Where a child attends two settings, the individual settings should ensure they are aware of the free entitlement hours being accessed by that child at another setting; this should help to avoid funding discrepancies regarding duplicate pupils. This may involve discussion with the settings involved where the pro-rata split is not clear from the census returns.
- Maintained schools and academies will only be funded up to the maximum of their published admission number on a termly basis, expressed in hours e.g. a 52 place nursery's maximum number of hours per week will be $52 \times 15 = 780$, so in 2015/16 for the summer term the maximum will be $780 \times 12 \text{ weeks} = 9,360$; for the autumn term $780 \times 14 \text{ weeks} = 10,920$; for the spring term $780 \times 12 \text{ weeks} = 9,360$.
- Although a child can stretch their entitlement over more than 38 weeks, the Local Authority will fund settings on the basis that all children are taking their entitlement over 38 weeks. It is for the individual setting to then manage funding. To ensure settings are funded correctly, these children should still be recorded in the censuses as accessing 15 hours where they access an annual total of 570 hours (equivalent to 15 hours x 38 weeks).

e) The Confirmed Indicative Budget published in March 2016 only gives an estimate of funding

- A 1st draft Indicative Budget for 2016/17 for all settings will be published at the end of February 2016. This budget will:
 - Show a setting's Base Rate and Deprivation and SEN Funding Rate, which are fixed for 2016/17

- Be calculated on hours at setting information taken from the previous 3 termly censuses i.e. estimating that a setting's numbers to be recorded in the following 3 censuses will be the same as the previous 3 censuses
 - May 2015 for an estimate of the May 2016 census
 - October 2015 for an estimate of the October 2016 census
 - January 2016 for an estimate of the January 2017 census
- Settings will then have the opportunity to revise their estimates, should they wish, to incorporate their latest information on admissions for the coming financial year. PVI providers must complete and submit the 'Update to Termly Estimates Form' to inform the LA of the revisions required. This form can be downloaded from Bradford Schools Online.
- A Confirmed Indicative Budget for 2016/17 will then be published in March 2016. This budget will be used to begin payments to maintained schools and PVI providers (see paragraph g below)
- To accompany the Confirmed Indicative Budget, a ready reckoner will be provided by the Local Authority in March 2016 for settings to use to anticipate the value of potential adjustments to funding and to plan their provision and cash flow accordingly.

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

- Adjustments to funding will be calculated following each of the termly censuses:
 - Please see the [timetable](#) for when adjustments will be published and actioned in 2016/17. These adjustments will alter the amounts of funding physically paid to settings.
 - The adjustments will reflect the differences between the estimated and actual funded hours delivered,
 - A ready reckoner will be provided by the Local Authority, alongside the Confirmed Indicative Budget in March, which settings can use to anticipate these funding adjustments and plan their provision and spending accordingly,
 - A statement of the value of adjustments will be published in advance of the adjustments being actioned. Please see the [timetable](#).
- Additional notes on the calculation of funding adjustments:
 - The value of adjustments is influenced by the accuracy of the estimates of funded hours in the Confirmed Indicative Budgets published in March,
 - These adjustments can be both positive and negative,
 - All adjustments for the 2016/17 financial year will be actioned before 31 March 2017 i.e. in year,
 - Funding adjustments will take account of any sustainability funding; the ready reckoner provided by the Local Authority will incorporate this.
 - Because of the very tight timescale for processing the data after the January 2017 census, the adjustments for the spring term 2017 for PVI settings will be based on the summary information. Where amendments to funding are subsequently identified e.g. for duplicate children, following the processing of the more accurate individual child level census data, these amendments will be incorporated into the adjustments made for the funding for the summer term 2017 following the May 2017 census. Where a setting does not pay back any money owed to the Local Authority at year end via cheque the value of funding owed will be taken from the setting's summer term payment,
 - Where closed or closing settings owe funding to the Local Authority that cannot be recovered through the adjustment of advances the setting will be asked to pay the funding back via cheque.

g) In 2016/17 the way in which funding is physically paid, and the timing of adjustments to payments, will be on a monthly basis for both Maintained & PVI settings

- Maintained schools already have a well-established monthly advances payment system and EYSFF funding will be allocated using this. Schools are already familiar with the way in which these advances are set at the start of the financial year, but are then adjusted to take account of changes in funding (e.g. for statemented SEN) during the course of the year; in June, September, December and March. The adjustments to EYSFF funding will be incorporated into the September 2016, December 2016 and March 2017 advances adjustments. Please see the [timetable](#).
- The move to monthly payments for PVI providers constitutes a change on 2015/16 arrangements. However, this change does not affect the way in which funding allocations are calculated; it simply adjusts the timing of funding payments.
 - **Summer Term** funding from the Confirmed Indicative Budget is divided by 5 (no. of months in term) for 5 equal payments to be made between April and July.
 - 2 payments are made in April, firstly for April and then for May. Payments for the remaining 3 months of summer term will be paid in May, June and July respectively.
 - Any positive or negative adjustment following the re-calculation of funding using May Census actual numbers will be added to or deducted from the July advance.
 - Where the July advance is insufficient to recoup the full value of any negative adjustment, the August advance will also be reduced. Where a negative balance is still outstanding after this, a deduction will be made from September advance.
 - **Autumn Term** funding (either from the Confirmed Indicative Budget or from a revised calculation where the Authority has been notified of a change in numbers) is divided by 4 (no. of months in term) for 4 equal payments to be made between August and November.
 - The payment for September will be made in August, with payments for the remaining 3 months of the term made in September, October and November.
 - Any positive or negative adjustment following the re-calculation of funding using the October Census actual numbers will be added to or deducted from the November advance.
 - Where the November advance is insufficient to recoup the full value of any negative adjustment, the December advance will also be reduced. Where a negative balance still outstanding after this, a deduction will be made from January advance.
 - **Spring Term** 80% of spring term's funding (either from the Confirmed Indicative Budget or from a revised calculation where the Authority has been notified of a change in numbers) is divided by 3 (no. of months in term) for 3 equal payments to be made between December and February.
 - The payment for January will be made in December, with payments for the remaining 2 months of the term made in January and February.
 - Any positive adjustment following the re-calculation of funding using the January Census actual numbers will be paid in a single additional payment at the end of March. This payment will include any funds owed from 20% of the termly amount being withheld from the initial advances calculation.
 - A setting that has still been overpaid, after the 20% that was withheld from the initial calculation has been taken into account, must repay the value of overpayment by cheque by **30 April 2017**. Where a cheque is not received by 30 April 2017, the Local Authority will deduct the value of the outstanding overpayment from the next available monthly advance in the summer term. This is likely to be in May 2017.

Where a PVI setting experiences exceptional cash flow difficulties, they should contact the Local Authority to discuss the matter further. Contact details can be found in Section 3 of this document.

- The monthly payment will incorporate payments for 2 Year Olds, 3 & 4 Year Olds, Early Years Pupil Premium, Looked After Children and any other applicable funding due from Bradford Council to providers.
- Funding for Looked After Children and Early Years Pupil Premium are calculated on a retrospective basis and will be added to monthly advances as a lump sum in September, December and March.
- Settings will receive one single payment each month combining all the funding and grants applicable for that month. A breakdown of the values paid for each section of funding and/or grants

can be obtained from the Advances Update Schedule. This will be updated and published on Bradford Schools Online monthly. We strongly recommend providers download this schedule every month.

h) Funding for Children who are Looked After in 2016/17

- Funding for Children who are Looked After in Early Years will be allocated on the following basis:
 - Whether a child is Looked After will be recorded in the censuses, subject to audit by the Authority.
 - Every setting is allocated an additional £333 per Looked After Child per term recorded in the censuses (£1,000 on a full year basis if a child is counted in all 3 termly censuses). This is allocated on a per child basis and is not affected by the number of hours the Looked After Child actually takes at the setting
 - This funding only applies to children that are registered as currently in care
- Funding for Children who are Looked After in Early Years settings will be allocated on a retrospective basis within the termly adjustments framework, following the census each term.
- For maintained providers, the funding for all Children who are Looked After in schools will be allocated separately from formula funding and will be allocated on a termly basis. This change is in response to the introduction of the specific element of the new Pupil Premium, to ensure that we have a single joined up approach to providing additional funding support for these children. Please see the guidance notes, which will accompany the full budget statements for maintained providers, for more details.

i) Approach to funding Sustainability Issues in 2016/17

- The EYSFF in 2016/17 continues to include a “sustainability” factor, which works on a sliding scale basis to allocate funding specifically to Nursery schools in addition to the funding per children per hour. This factor ensures that funding allocations continue to reflect specific:
 - Site related costs: buildings and grounds maintenance costs, rates and insurance,
 - Costs relating to supporting Newly Qualified Teachers and safeguard as a result of re-deployment,
 - Fixed type costs incurred by maintained settings in leadership and management and administration and premises staffing.
- The Minimum Funding Guarantee (MFG) applies to the EYSFF for all providers in 2016/17. The EYSFF MFG is set at -1.5% and applies only to the Base Rates. This means that if the Base Rate reduces from one year to the next, the value of this reduction would be limited to 1.5% (excluding one off monies allocated in the previous year). Please be aware that deprivation rates are not covered by this MFG.
- Both maintained and PVI providers can access dedicated business support, provided by Bradford Council EYCP, for advice on any budget or sustainability issues.
- The Schools Forum has established a process, which is currently used to consider the allocation of additional funding, on a one off basis, to Primary schools facing exceptional cost pressures during the financial year. Requests for funding, submitted by schools, are reviewed on an individual case basis against set criteria. The most common reason for requests is a significant increase in pupil numbers during the financial year, where the school has had to make additional provision, such as setting up a new class. This established process will be used in 2016/17 as the basis on which to consider the allocation of additional funding to any maintained or PVI setting that may face exceptional cost pressures. A likely common reason for setting's asking for exceptional funding will be where a setting has admitted a significant number of children after the census has been collected for that term. In such cases, exceptional circumstances will always be measured in terms of the level of additional cost pressure faced by the setting in admitting these children, rather than simply measured by the number of additional children not counted in the census.

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

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

k) The Early Years Pupil Premium (EYPP) in 2016/17

- Based on the 2015/16 rate, providers will receive up to £300 per year, or £0.53 per child per hour, for each eligible child.
- Early Childhood Services have access to the DfE’s Eligibility Checking Service which will be used to check whether a child is eligible for the Pupil Premium. Providers will then be funded on a termly basis, along with their main Early Years Single Funding Formula, through the established termly adjustments process. The first allocation of the Early Years Pupil Premium will be from data collected from the May 2016 Census.
- The eligible groups for the Early Years Pupil Premium will be as follows:
 - children from low income families (defined as meeting the criteria for free school meals);
 - children that have been looked after by the local authority for at least one day;
 - children that have been adopted from care; have left care through special guardianship;
 - and children subject to a child arrangement order setting out with whom the child is to live (formerly known as residence orders)
- As with the school-age Pupil Premium, the Government believes providers are best placed to know how to support their disadvantaged pupils with the Early Years Pupil Premium. Restrictions will therefore not be imposed on how providers spend the Early Years Pupil Premium. Instead, Ofsted will hold providers to account for how they’ve used their Early Years Pupil Premium to support their disadvantaged children through the regular inspection process.
- The DfE’s consultation web-page gives further information on the Early Years Pupil Premium:
[https://www.gov.uk/government/consultations/early-years-pupil-premium-and-funding-for-2-year-](https://www.gov.uk/government/consultations/early-years-pupil-premium-and-funding-for-2-year-olds)

[olds](https://www.gov.uk/government/consultations/early-years-pupil-premium-and-funding-for-2-year-olds)

SECTION 2

l) The extension of the free entitlement to 2 year olds

- Free early education became a statutory entitlement for eligible 2 year olds from 1 September 2013. Eligible children are defined as children who are looked after and children who meet the Free School Meals eligibility criteria. The programme was extended from September 2014 to include around 40% of 2 year olds.
- The EYWG and Schools Forum have previously considered various options to fund the free entitlement for 2 year olds. In 2015/16 these places were funded on a flat rate of £4.85 per hour, with no differentiation for different types of provision. Child numbers were counted and funded in the same way as for 3 / 4 year olds – based on participation recorded at individual settings in the termly censuses, but incorporating a second headcount each term. This second headcount identifies the most vulnerable children that don’t arrive neatly at the start of term (especially the autumn term when the census is taken early in October) and also has supported the adequate funding of settings where there has been some slippage in the timescales of capital buildings programmes. The

second headcount supports meeting the key outcome, which is to secure sufficient places on a participation-led funding basis.

- This approach is continued in 2016/17 at a single flat rate per hour, indicatively £4.85 for all children. The Funding Regulations only permit a single flat rate to be used to allocate funding for the 2 year old offer.
-
- The second head count will be taken on the following dates:
 - **Summer term:** 16 June 2016 / **Autumn term:** 3 November 2016 / **Spring Term:** 2 March 2017
- The Local Authority now holds a database of delivery numbers. We anticipate this data will be used to calculate initial 2 Year Old funding allocations as part of the indicative budget publication process.

SECTION 3

m) Who do I contact?

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

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

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

Or Samantha Padgett, Early Years Childhood Services, City of Bradford Metropolitan District Council, 01274 431386, samantha.padgett@bradford.gov.uk

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

Appendix: Bradford District Early Years Single Funding Formula 2016/17 Timetable

Please read this timetable alongside the separate '[Technical Statement](#)', which explains how the Early Years Single Funding Formula (EYSFF) will be applied across the Bradford District for the 2016/17 financial year.

Date	Key Activity
January 2016	<p>a) Department for Education (DfE) January Census 21 January</p>
February 2016	<p>a) 1st draft of Indicative Budgets for 2016/17 Published week commencing 22 February</p> <ul style="list-style-type: none"> • <u>Maintained settings</u> will be able to access these budgets on the Bradford Schools Online (BSO) website. • <u>PVI settings</u> will be able to access these budgets on the Bradford Schools Online (BSO) website. Please note budget information will no longer be sent by post. • The 1st draft of Indicative Budgets for 2016/17 will be based on each setting's hours delivered recorded in the May 2015, October 2015 and January 2016 censuses i.e. assuming that each setting will be funded for the same number of hours delivered in 2016/17 as in 2015/16. • Settings will then have approximately 3 weeks to review these estimates of funded hours, with the opportunity to change these up or down, prior to the publication of confirmed Indicative Budgets. PVI settings will need to complete the 'Update to Termly Estimates Form' and submit this to the LA. Further details of the checking process will be published with the budgets.
February / March 2016	<p>a) Spring Term 2015/16 Adjustments Statement Published week commencing 29 February</p> <ul style="list-style-type: none"> • A reconciliation statement for all settings will be published, which will show the differences between estimated and actual spring term funded hours delivered and the value of adjustments due. • <u>Maintained settings</u> and <u>PVI settings</u> will be able to access this statement on the BSO website. <p>b) Confirmed Indicative Budgets for 2016/17 Published week commencing 14 March</p> <ul style="list-style-type: none"> • The confirmed Indicative Budgets will establish the starting point for funding for the 2016/17 financial year. These budgets will be different from the 1st draft, where settings have asked for their estimates of funded numbers to be altered. Where a setting has not asked for their estimates to be altered, their confirmed Indicative Budget will be the same as their 1st draft. • The confirmed Indicative Budgets will be published with a warning that these budgets are subject to change, for differences between estimates of and actual funded hours delivered recorded in the termly censuses. • The confirmed Indicative Budgets will be published in the same way as the 1st draft Indicative Budgets.

	<ul style="list-style-type: none"> At the same time confirmed Indicative Budgets are published, the LA will provide a 'ready reckoner', which settings can use to anticipate likely adjustments to funding for actual funded hours delivered. <p>c) Payment of the final 20% for the Spring Term for the 2015/16 financial year (<u>PVI settings</u>) week commencing 21 March</p> <ul style="list-style-type: none"> Where an adjustment is required to the spring term payment as a result of the January 2016 census, the value of additional funding due or funding owed back to the LA will added to or taken from the 20% payment (please see page 6 of the statement for further information). <p>d) Monthly Advances for <u>Maintained settings</u> amended to incorporate Spring Term 2015/16 adjustment</p> <ul style="list-style-type: none"> For Maintained settings, the value of LA I01 funding used to calculate the monthly advances will be amended in the final advances update in March 2016 to take account of the adjustment due from the January census. This adjustment will impact on each school's March 2016 carry forward balances position. Schools should use the ready reckoner provided by the LA to ensure that this adjustment is incorporated by schools in their forecast of their year end balances position.
<p>April 2016</p>	<p>a) Calculation and Publication of Monthly Bank Account Advances for <u>Maintained settings and PVI Providers</u></p> <ul style="list-style-type: none"> For Maintained Primary schools with Nursery classes, Nursery Schools and PVI providers, the Early Years Confirmed Indicative Budget will make up part of the school's Section 251 Budget Statement. Monthly advances for 2016/17 will be calculated from the Section 251 Budget Statements and a schedule & breakdown of payments will be published at the beginning of April. Monthly payments for <u>PVI settings</u> for 2016/17 to begin. Settings should consult advances statement published on Bradford Schools Online at the beginning of April.
<p>May 2016</p>	<p>a) May (Summer Term) Census 19 May 2016</p> <ul style="list-style-type: none"> <u>Maintained settings</u> will submit their termly census to the DfE via COLLECT. <u>PVI settings</u> will submit their census directly to Bradford Council ECS via the Bradford Provider Gateway on Bradford Schools Online (BSO). The Gateway will be open to do this from the beginning of term and will close after headcount day.
<p>June / July 2016</p>	<p>a) Summer Term Adjustments Statement Published week commencing 27 June and payment adjustments <u>PVI settings</u></p> <ul style="list-style-type: none"> A second head count for 2 year olds will be taken on Thursday 16 June 2016 A reconciliation statement for all settings will be published, which will show the differences between estimated and actual summer term funded hours delivered and the value of adjustments due. The adjustment will be a positive value (meaning that the LA owes the setting more funding), where the number of hours delivered actually recorded in the May census is greater than the estimate used in the confirmed Indicative Budget. The adjustment will be a negative value (meaning the setting must repay funding back to the LA) where the number of hours delivered recorded in the May census is lower than the estimate used in the

	<p>confirmed Indicative Budget.</p> <ul style="list-style-type: none"> • <u>Both Maintained and PVI settings</u> will be able to access this statement on the BSO website. • Adjustments will be made to the July 2016 payment for <u>PVI Settings</u> (both positive and negative) for the recalculation of summer term funding from the May Census. The August payment may also be adjusted, where the value of the July advance is not sufficient to enable full recovery of a negative adjustment.
August 2016	<p>a) Deadline for <u>PVI settings</u> to notify the Local Authority of changes to estimates of autumn term funded hours Monday 10 August</p> <ul style="list-style-type: none"> • Where a PVI setting forecasts that their numbers of hours delivered in the autumn term will be significantly different from the estimate used to calculate the confirmed Indicative Budget, the LA can make an adjustment to payments from September to reflect this difference. The PVI setting must inform the LA prior to the deadline date by completing and returning the 'Update to Termly Estimates Form'. The LA would not expect to need to make such adjustments for maintained schools.
September 2016	<p>a) Monthly Advances for <u>Maintained settings</u> amended to incorporate Summer Term adjustments</p> <ul style="list-style-type: none"> • For Maintained settings, the value of LA I01 funding used to calculate the monthly advances will be amended in September to take account of the adjustment due for the summer term. • For PVI settings, the September monthly payment will be amended only where, following adjustments to the July and August payments, there is still an outstanding overpayment to recover relating to the summer term.
October 2016	<p>a) October (Autumn Term) Census 6 October 2016</p> <ul style="list-style-type: none"> • <u>Maintained settings</u> will submit their termly census to the DfE via COLLECT. • <u>PVI settings</u> will submit their census directly to Bradford Council ECS via the Bradford Provider Gateway on Bradford Schools Online (BSO). The Gateway will be open to do this from the beginning of term and will close after headcount day.
November 2016	<p>a) Autumn Term Adjustments Statement Published week commencing 14 November and payment adjustments PVI settings</p> <ul style="list-style-type: none"> • A second headcount of 2 year olds will be taken on 3 November 2016. • A reconciliation statement for all settings will be published, which will show the differences between estimated and actual autumn term funded hours delivered and the value of adjustments due. • <u>Maintained settings</u> and <u>PVI settings</u> will be able to access this statement on the BSO website. • Adjustments will be made to the November 2016 payment for <u>PVI Settings</u> (both positive and negative) for the recalculation of autumn term funding from the

	<p>October Census. The December payment may also be adjusted, where the value of the November advance is not sufficient to enable full recovery of a negative adjustment.</p>
December 2016	<p>a) Monthly Advances for <u>Maintained settings</u> amended to incorporate Autumn Term adjustments</p> <ul style="list-style-type: none"> For <u>Maintained settings</u>, the value of LA I01 funding used to calculate the monthly advances will be amended in December to take account of the adjustment due for the autumn term. <p>b) Deadline for <u>PVI settings</u> to notify the Local Authority of changes to estimates of spring term funded hours Friday 9 December</p> <ul style="list-style-type: none"> Where a <u>PVI setting</u> forecasts that their numbers of hours delivered in the spring term 2017 will be significantly different from the estimate used to calculate the confirmed Indicative Budget, the LA can make an adjustment to the initial spring term payment to reflect this difference. The setting must notify the LA before the deadline date by completing and returning the 'Update to Termly Estimates Form'. The LA would not expect to need to make such adjustments for maintained schools.
January 2017	<p>a) DfE January (annual) Census 26 January 2017</p> <ul style="list-style-type: none"> <u>Maintained settings</u> will submit their termly census to the DfE via COLLECT. <u>PVI settings</u> will submit their census directly to Bradford Council ECS via the Bradford Provider Gateway on Bradford Provider Gateway on Bradford Schools Online (BSO). The Gateway will be open to do this from the beginning of term and will close after headcount day.
February 2017	<p>a) 1st Draft of Indicative Budgets for 2017/18 Published (see notes for February 2016)</p>
March 2017	<p>a) Spring Term 2016/17 Adjustments Statement Published week commencing 27 February</p> <ul style="list-style-type: none"> A second head count of 2 year olds will be taken on Thursday 2 March 2017. A reconciliation statement for all settings will be published, which will show the differences between estimated and actual spring term funded hours delivered and the value of adjustments due. <u>Maintained settings</u> and <u>PVI settings</u> will be able to access this statement on the BSO website. <p>b) Monthly Advances for <u>Maintained and PVI settings</u> amended to incorporate Spring Term 2016/17 adjustment</p> <ul style="list-style-type: none"> For <u>Maintained settings</u>, the value of LA I01 funding used to calculate the monthly advances will be amended in the final advances update in March 2017 to take account of the adjustment due from the January census. This adjustment will impact on each school's March 2017 carry forward balances position. Schools should use the ready reckoner provided by the LA to ensure that this adjustment

	<p>is incorporated by schools in their forecast of their year end balances position.</p> <ul style="list-style-type: none"> For <u>PVI settings</u>, any positive adjustment following the re-calculation of funding using the January Census actual numbers will be paid in a single additional payment. A setting that has been overpaid, must repay the value of overpayment by cheque by 30 April 2017. Where a cheque is not received by 30 April 2017, the Local Authority will deduct the value of the outstanding overpayment from the next available monthly advance in the summer term. This is likely to be in May 2017 <p>c) Confirmed Indicative Budgets for 2017/18 Published for all settings</p>
April 2017	<p>a) Calculation and Publication of Monthly Bank Account Advances for 2017/18 for <u>Maintained and PVI settings</u></p>

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

If you have any queries, please contact:

- Maintained settings: Dawn Haigh, 01274 433775 dawn.haigh@bradford.gov.uk
- PVI settings: Jaclyn McManus, 01274 431965, jaclyn.mcmanus@bradford.gov.uk
Samantha Padgett, 01274 431386, Samantha.padgett@bradford.gov.uk

SCHOOLS FORUM AGENDA ITEM

For Action



For Information

**Brief Description of Item**

This report asks the Forum to consider the consultation document which outlines the proposals for the formulae to be used to calculate budgets for Primary and Secondary schools and academies in the 2016/17 financial year.

The consultation document also includes the criteria that will form the basis of the allocation of additional funding to schools (and academies where appropriate) from DSG contingency funds.

Date (s) of any Previous Discussion at the Forum

The Primary and Secondary funding formulae for 2016/17 have not yet been discussed in any detail by the Schools Forum.

Background / Context

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

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

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

On 16 July 2015, the Schools Block per pupil funding rates for each local authority for 2016/17 were confirmed to be the same as in 2015/16, including the additional money allocated to the least fairly funded authorities as a result of minimum funding levels. Final schools block allocations will be confirmed in December 2015 in line with data on pupils recorded in the October 2015 Census. On the same day the Government published the "[School revenue funding 2016 to 2017: Operational guide](#)" which confirms that the regulations in place for 2015/16 remain unchanged for 2016/17, so there are no required changes in the funding mechanisms for primary and secondary schools and academies in the 2016/17 financial year.

A National Fair Funding Formula for primary and secondary schools and academies is now expected to be introduced in April 2017.

Details of the Item for Consideration

Following the announcement on 16 July 2015 which confirmed that 2016/17 is a stand-still year nationally, we are proposing to make no changes to our primary and secondary formula funding structures for next year.

The main consultation document is attached at Appendix 1, and the accompanying appendices are shown in Appendices 1 (1a and b), (2), (3) and (4) to this paper.

As we are not proposing to make any changes to the structure (the factors and how these are used) of the primary and secondary funding formulae, or the criteria for the allocation of Schools Block DSG contingency and growth funds, this consultation document may be viewed more for information purposes and as a reminder of our current funding structure.

The Local Authority must submit to the Education Funding Agency (EFA), by 30 October 2015, a pro-forma, which shows the structure of the formulae that will be used to calculate primary and secondary delegated budget shares for the 2016/17 financial year. To comply with this deadline, the consultation document is

Details of the Item for Consideration

concerned with setting the structure of the formula for 2016/17. The Formula Funding Working Group (FFWG) and Schools Forum will then need to review the values of formulae factors in order to set them prior to submitting our final pro-forma to the EFA in January 2016.

The consultation document focuses solely on the Schools Block funding of primary (Reception – Year 6) and secondary (Year 7 – Year 11) maintained schools, academies and free schools across the Bradford District.

Section 3 of the consultation document gives an overall summary of the proposed funding formula for each phase for 2016/17 and the pro-forma shown in Appendix 1 (2) to this document provides further details on the proportion of funding allocated via each factor.

Section 4 asks for views on the continuation of existing de-delegated funds. It does not, at this stage, make any proposals for the ceasing or values of any funds. This will be further discussed by the Schools Forum during the autumn term. We would expect the values to meet anticipated cost pressures, and to reduce from this year due to schools converting to academy status.

Section 5 proposes the criteria that will form the basis of the allocation of additional funding to schools (and academies where appropriate) in 2016/17 from established contingency funds, for example funding for expanding schools / academies from the Growth contingency fund. The proposed criteria for 2016/17 contingency funds are the same as in 2015/16.

The modelling shown in Appendix 1 (1a) and Appendix 1 (1b) illustrates the impact of the proposals outlined in the consultation document for individual schools and academies, based on maintaining a 'cash flat' position overall and using estimated October 2015 pupil numbers on roll and the October 2014 Census Dataset from the EFA. The modelling is intended only to give an early estimate of individual allocations for 2016/17 from the Schools Block. The consultation document states that it is very likely that we will be unable to maintain a cash flat position in 2016/17 budgets, mainly due to overall DSG affordability issues and an overall increase in pupil numbers and data expected in the October 2015 Census.

Forum members are asked to consider and agree the consultation document and accompanying appendices, so that it can be published for stakeholders as soon as possible.

Although the consultation paper proposes no change to the funding formulae structures in 2016/17, we are still hoping to receive some feedback from schools and academies, especially from maintained schools on the continuation of de-delegation (see section 4).

The outcomes of the consultation will be presented to the Forum in the October meeting, to enable final recommendations to be made and the Indicative Pro-forma to be submitted to the EFA by 30 October.

The values of formulae factors will need to be set prior to submission of our final pro-forma to the EFA in January 2016. As stated in the consultation document, the (cash flat) unit values shown in the pro-forma in Appendix 1 (2) are indicative only at this stage and subject to further discussion. The Schools Forum will make final recommendations on the values of formulae factors in the January meeting, once the October 2015 Census Dataset is available and the 2016/17 DSG and cost pressures are known.

Formula Funding Working Group (FFWG) and National Fair Funding Formula 2017/18

The FFWG, comprising of representatives from both primary and secondary phases, as well as local authority officers, will meet in the next few weeks to start to consider the possible impact of a National Fair Funding Formula on schools and academies across the Bradford District.

The Education Secretary has confirmed that the Government is keen to implement a National Fair Funding Formula and will be consulting extensively with the sector. Given the mounting pressure from various groups and local authorities that are pressing for swift implementation of a national formula, and the confirmation that next year is a stand-still year, we expect that the DfE will seek to implement a National Fair Funding Formula at April 2017. We are therefore expecting information to be published later this term and next term, that will enable us to model the likely financial impact of a National Fair Funding Formula on schools and academies across the Bradford District.

In the absence of any confirmed information on the implementation of a National Fair Funding Formula, the FFWG will start to consider whether the current (2015/16) distribution of additional educational need (AEN) formula funding is in line with national and statistical neighbour averages. The key discussions that are anticipated to take place in the FFWG meetings are likely to focus on the distribution of core funding vs. funding for additionality, and how we compare against other local authorities. We will also continue to look at the primary to secondary funding ratio and whether adjusting the ratio between primary and secondary funding would lead to an improvement in pupil outcomes in each phase. An update will be provided at the next Forum meeting.

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

There are no direct implications arising from the updated funding regulations for the DSG in 2016/17; the DfE has confirmed that the per pupil unit of Schools Block funding allocated to the Bradford District will remain at the same level as in 2014/15 and 2015/16.

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

The District's key strategic aims are to:

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

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

Overall continuity in our funding model for primary and secondary schools and academies in 2016/17 will provide a stable platform for schools / academies to continue to meet their educational priorities.

Recommendations

The Schools Forum is asked to agree that the consultation document, shown in Appendix 1, and its appendices, are published.

List of Supporting Appendices / Papers

Appendix 1 - Consultation and Information on the Primary and Secondary Funding Formulae 2016/17
Appendix 1 (1a and b) - Illustrative Formula Modelling
Appendix 1 (2) - Indicative EFA Pro-forma for 2016/17
Appendix 1 (3) - Consultation Responses Form
Appendix 1 (4) - Purpose of each De-Delegated Fund Proposed in 2016/17

Contact Officer (name, telephone number and email address)

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CONSULTATION & INFORMATION ON PRIMARY & SECONDARY FUNDING FORMULAE 2016/17 FINANCIAL YEAR

1. Introduction and National Fair Funding Formula

1.1 The key message “DO NOT PANIC” has been communicated for the past three years and remains important in this year’s consultation. The Minimum Funding Guarantee (MFG) will continue to protect schools and academies against sharp reductions in funding in 2016/17.

1.2 However, please be aware that, all other elements being the same, schools and academies that were on the MFG in this current financial year will see up to a 1.5% reduction in formula funding per pupil in 2016/17. The introduction of a National Fair Funding Formula in the future (probably at April 2017 – see below) is expected to result in a larger redistribution of funding between schools and academies over time. The MFG is only a sliding scale protection that will be removed at some point. As we move towards a National Fair Funding Formula it continues to be important for us to consider our overall Dedicated Schools Grant (DSG) funding position, as well as the funding positions of individual schools and academies, against the national mean and median values. We might expect a national formula in the future to be constructed around these averages. Further work considering the possible impact on individual schools and academies is currently underway and will be considered by the Formula Funding Working Group and the Schools Forum during the autumn term. We also expect further announcements this term from the DfE about the National Funding Formula.

1.3 We do not propose to make any changes to the structure (factors and how these are used) of the primary and secondary funding formulae, or the criteria for the allocation of Schools Block DSG contingency and growth funds, in the 2016/17 financial year. We propose to continue to use the existing 2015/16 structures. We welcome feedback from schools and academies, especially from maintained schools on the continuation of de-delegation (see paragraph 4). However, as we are not proposing to make any changes to already agreed structures, this document may be viewed more for information purposes and as a reminder of what our structures are.

1.4 To recap where we are in the transition to the National Funding Formula for primary and secondary:

- In March 2012, the Government announced significant changes to the education funding system. These changes were implemented by all local authorities at 1 April 2013 and included simplified formula arrangements for the calculation of delegated budgets and significant new restrictions on the central management of funds within the Dedicated Schools Grant (DSG).
- On 4 June 2013, the Government published a document entitled “[2014-15 Revenue Funding Arrangements: Operational Information for local authorities](#)”, which set out further changes to funding arrangements for the 2014/15 financial year, which were designed to continue progress towards a national fair funding formula.
- On 17 July 2014, the Government confirmed that authorities and Schools Forums would continue to be required to set local formula funding arrangements for the 2015/16 financial year. The [2015-16 Operational Guide](#) confirmed that the arrangements in place for 2014/15 would continue for 2015/16, but with a small number of changes, which included the requirement for the Authority to calculate funding for all academies (including former non-recoupment academies) and free schools through our local formulae, including funding for in year growth. The Government also confirmed that £390 million would be allocated to the least fairly funded authorities in England to ensure that every local authority attracts a minimum funding level for the pupils and schools in its area; as our funding was already above the minimum funding levels, this did not affect Bradford’s DSG.
- On 16 July 2015, the Schools Block per pupil funding rates for each local authority for 2016/17 were confirmed to be the same as in 2015/16, including the additional money allocated to the least fairly funded authorities as a result of minimum funding levels. Final schools block allocations will be confirmed in December 2015 in line with data on pupils recorded in the October 2015 Census. On the same day the Government published the “[School revenue funding 2016 to 2017: Operational guide](#)” which confirms that the regulations in place for 2015/16 remain unchanged for 2016/17, **so there are no required changes in the funding mechanisms for primary and secondary schools and academies in the 2016/17**

financial year. 2016/17 is a stand-still year nationally. It is on this basis that we propose to make no changes to our primary and secondary formula funding structure.

- The Education Secretary has stated that the Government will bring forward proposals for a National Fair Funding Formula “in due course”, and these proposals will be subject to extensive consultation. The earliest date that a National Fair Funding Formula could be implemented is April 2017, and the expectation is that further information will be made available this term. Given that pressure is mounting nationally from various groups and local authorities that are pressing for the swift implementation of a national fair funding formula, and that 2016/17 is a stand-still year needed to give time for development work and consultation, **it is expected that the DfE will seek to implement the National Fair Funding Formula at April 2017.**

1.5 The detail of this document has been written by the Local Authority in conjunction with the Schools Forum, with modelling using the October 2014 Census dataset, updated for our estimate of October 2015 numbers on roll for individual schools and academies. The dataset taken from the actual October 2015 Census, collected on Thursday 1 October 2015, will be used to calculate school and academy budgets for 2016/17. Schools and academies are reminded therefore, that it is vitally important that their October 2015 Census submissions are timely and accurate. The Authority will not be able to intervene to adjust census data once this has been submitted and confirmed with the DfE. Inaccuracies may lead to an under funding in 2016/17 that cannot be rectified.

1.6 The Local Authority must submit to the Education Funding Agency (EFA), by 30 October 2015, a pro-forma, which shows the structure of the formulae that will be used to calculate primary and secondary delegated budget shares for the 2016/17 financial year. To comply with this deadline, this consultation is concerned with setting the structure of the formula for 2016/17. The Schools Forum will then set the values of formula factors in the meetings in January 2016.

1.7 This consultation document focuses solely on the Schools Block funding of primary (Reception – Year 6) and secondary (Year 7 – Year 11) maintained schools, academies and free schools across the Bradford District. A separate consultation, concerning the funding of Early Years provision, is currently live and closes on Friday 16 October 2015; we do propose to make any changes to the Early Years Single Funding Formula (EYSFF) in 2016/17, subject to the outcome of the consultation. A further consultation, concerning the funding of High Needs in 2016/17, will be published at the end of October 2015. These consultation papers are, or will be, available from the [Bradford Schools Forum Consultation Papers](#) webpage on Bradford Schools Online (BSO).

1.8 In addition to these consultations, there are a number of significant discussions taking place within the Schools Forum that school and academy colleagues should keep track of (papers can be accessed from the [Bradford Council Minutes website](#)) as these are likely to have implications for delegated budgets in the future. If you are interested to understand more about these discussions, or would like to input into these, please contact Andrew Redding 01274 432678 andrew.redding@bradford.gov.uk or Sarah North 01274 434173 sarah.north@bradford.gov.uk, or alternatively, liaise with your Schools Forum representative.

1.9 In order to manage all cost pressures within the DSG in the past two years, the values of certain formula variables have been reduced. The Local Authority is currently working on the basis of seeking to maintain an overall ‘cash flat’ position for the funding of primary and secondary schools and academies in 2016/17; this means that the factor unit values used in the illustrative modelling in this consultation are currently set at 2015/16 values. However, it is highly possible that further reductions in formula variables may be needed to balance the overall DSG allocation. Recommendations concerning this will be made by the Schools Forum in January 2016. School and academy colleagues should keep track of discussions by monitoring Schools Forum papers and minutes available on the [Bradford Council Minutes website](#).

1.10 Please note that the modelling shown in Appendix 1 is illustrative only and does not represent a final view of 2016/17 allocations for each school or academy. Please see paragraph 7 for further explanation of what this modelling shows. 2016/17 delegated budgets are subject to October 2015 pupil numbers on roll and pupil data, and to overall affordability within the 2016/17 DSG, taking into account all cost pressures. It is very likely that we will be unable to maintain a cash flat position in 2016/17 budgets, mainly due to affordability issues with funding for high needs and an overall increase in pupil numbers and data expected in the October census. The actual funding position for schools and academies may also be affected by further discussions within the Schools Forum on the relationship between primary and secondary levels of funding, the position against other authorities and against national averages, and the values of over or under spends of specific

funds in 2015/16. There continues to be no prescribed ratio between primary and secondary levels of funding in 2016/17.

1.11 The deadline for responses to this consultation is **Friday 16 October 2015**. An analysis of responses received by the deadline will then be discussed at the Schools Forum meeting held on 21 October 2015. Please address all questions and responses to either Sarah North 01274 434173 sarah.north@bradford.gov.uk or Andrew Redding 01274 432678 andrew.redding@bradford.gov.uk. A response form is included at Appendix 3.

2. Schools Block - Formulae Factors and other key elements that remain unchanged in 2016/17

2.1 The key elements of the Schools Block framework that remain the same in 2016/17 are as follows:

- Delegated budgets will be calculated on the October (2015) Census.
- The simplified primary and secondary funding formulae arrangements continue, based on 13 allowable factors, plus exceptional premises factors individually approved by the EFA. As was the case for 2015/16, two of these factors (the basic amount per pupil and a deprivation factor) are mandatory. The remaining factors are optional. Local authorities continue only to have limited choices in how these factors operate.
- 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 89.02% of the delegated schools block funding via the pupil-led factors in 2015/16, and the modelling included in this consultation indicates that we are currently allocating 89.09% in 2016/17.
- The Minimum Funding Guarantee (MFG) continues to be the only protection mechanism available for individual school and academy allocations and is set at MINUS 1.5% in 2016/17. We would expect then that, all other elements being the same, the budget of a school or academy on the MFG in this current financial year will reduce by 1.5% in 2016/17.
- The application of a ceiling (or cap) in 2016/17 to pay for the cost of the MFG protection for losing schools and academies will continue; this will cap the gains of the winning schools and academies so that they do not gain more than a specified % of funding per pupil. As the cost of the MFG reduces year on year, we would expect the value of the cap to also reduce.
- There continues to be no prescribed constraint on the primary to secondary funding ratio (the distribution of formula funding between phases).
- 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 still permitted for maintained schools. The decisions on the holding of 'de-delegated' funds will continue to be made by the Schools Forum on a phase by phase basis. Once these decisions are taken, they apply to all schools within each phase. Please see paragraph 4 for more information. 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 'contingencies' are also still permitted. Please see paragraph 5. Funding for expanding schools and academies and bulge classes, as well as safeguarded salaries remaining from previous re-organisations, will continue to be funded as contingency items.
- The 2015/16 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. A 'notional' SEN budget will still be defined within budget shares. Schools and academies with resourced provisions will continue to have their number of funded places removed from their number of pupils funded under the primary or secondary formula; for 2016/17 the number of 2015/16 academic year funded places will be deducted from the school's number on roll in October 2015. The Authority can still employ the 'SEN Funding Floor', which supports the costs in schools and academies with higher levels of SEN but where the normal funding formulae does not allocate sufficient resources. The lump sum element

of the SEN Funding Floor was increased in 2015/16 for both primary and secondary schools and academies.

- The Pupil Premium is set to continue in 2016/17, still as a separate grant allocation to schools and academies. We anticipate that this grant will continue to be based on Ever 6 FSM numbers, Ever 5 Service Children, Looked After Children and Children Adopted from Care. Unlike formula funding, the Pupil Premium Grant is allocated on January Census pupil numbers. The Pupil Premium is currently set at £1,320 for primary-aged and £935 for secondary-aged pupils eligible under the ever-6 FSM criteria. Children who are looked after or adopted from care currently are allocated £1,900, and service children are allocated £300. The Pupil Premium rates for 2016/17 have not yet been confirmed, but are expected to be at least equivalent to the rates in 2015/16.
- Allocations for academies and free schools will continue to be paid directly by the EFA. The EFA will use the pro-forma submitted by the Authority to calculate individual allocations.

3. Summary of 2016/17 Proposed Formulae

3.1 On the basis of not making any structural changes to the 2015/16 agreed formula, the table below summarises the formulae factors, and the indicative values of these factors in 2016/17 as these currently stand. The pro-forma shown in Appendix 2 provides further explanation on the basis of the calculations. Please note that the values of factors shown below are subject to change, and are very likely to decrease due to cost pressures in the High Needs block and due to an overall growth in pupil data expected to be recorded in the October Census; the Schools Forum will make final recommendations in January 2016, once the October 2015 Dataset is available and the DSG is confirmed.

Formula Factor	Indicative Primary Unit Value £ (2016/17)	Indicative Secondary Unit Value £ (2016/17)
Base Amount per Pupil – Primary	2,879.17	N/A
Base Amount per Pupil - Key Stage 3	N/A	4,157.97
Base Amount per Pupil - Key Stage 4	N/A	4,276.57
Deprivation - Ever 6 FSM	1,030.06	961.26
Deprivation IDACI - Band 1	305.12	394.01
Deprivation IDACI - Band 2	381.40	492.51
Deprivation IDACI - Band 3	457.68	591.01
Deprivation IDACI - Band 4	533.96	689.51
Deprivation IDACI - Band 5	686.52	886.51
Deprivation IDACI - Band 6	839.08	1,083.52
SEN Low Prior Attainment	242.46	496.91
English as an Additional Language	164.86	1,170.03
Pupil Mobility	1,615.88	1,925.59
Lump Sum per school / academy	175,000.00	175,000.00
Split Sites	Funded on LA formula (see paragraph 3.5)	Funded on LA formula (see paragraph 3.5)
Rates	Funded at actual cost	Funded at actual cost
Private Finance Initiative (PFI) contracts	Funded on LA formula (see paragraph 3.6)	Funded on LA formula (see paragraph 3.6)

3.2 The indicative values for all factors are currently set at the same values as in 2015/16, with the exception of the Base Amount Per Pupil factor unit value, which has increased by £5.14 in 2016/17 due to anticipated technical adjustments in the values of DSG funds.

3.3 We will continue to use the factors, where we have some choice about how these are used, in the same way as in 2015/16, as follows:

- **Base Amount per Pupil – Primary:** including the Reception Uplift factor to support schools and academies taking in Reception pupils between the October and January Censuses; this also supports schools with higher levels of mobility.
- **Deprivation - Ever 6 FSM:** the % of pupils on roll where the FSM indicator is TRUE in any of the censuses in the last 6 years

- **Deprivation IDACI Bands 0 - 6:** the % of pupils with an IDACI score in each band 0 – 6. IDACI is calculated based on the postcodes of pupils recorded in the October Census. The proposed weightings are unchanged from 2015/16 and are as follows:

IDACI Band	IDACI Score - Lowest	IDACI Score - Highest	Proposed Weighting
Band 1	0.20	0.25	1.00
Band 2	0.25	0.30	1.25
Band 3	0.30	0.40	1.50
Band 4	0.40	0.50	1.75
Band 5	0.50	0.60	2.25
Band 6	0.60	1.00	2.75

- **SEN Low Prior Attainment Primary:** the % of pupils in years 4, 5 and 6 that received less than 73 points on their Early Years Foundation Stage Profile (EYFSP) plus the % of pupils in years 1, 2 and 3 who did not achieve “a good level of development” under the new EYFSP. A weighting is applied to ensure that funding delivered through this factor is not disproportionately affected by the year groups assessed under the new framework.
- **English as an Additional Language (EAL) 3:** the % of pupils whose first language is not English and who are appearing on the school census for the first, second or third year.

3.4 We will continue to not employ the following optional factors in 2016/17:

- Sparsity Factor - the sparsity factor is not applicable to any school / academy in the Bradford District
- Looked After Children - it continues to be our view that the Pupil Premium should be the source of funding for Looked After Children, as has been the case since 2013/14. The Pupil Premium is currently set at £1,900 for children who are looked after in 2015/16, which is above our previous value of £1,000. The Pupil Premium rates for 2016/17 have not yet been confirmed, but rates are not expected to decrease in 2016/17.
- Post-16 Factor - we took the opportunity to remove post-16 funding factors from the secondary funding formula in 2013/14

3.5 There is no change to the operation of the split sites factor in 2016/17.

a) The criteria used to define a split site are unchanged for 2016/17 and are as follows:

- *Essential* - two or more distinctly separate campuses where there is no single continuous boundary and where the campuses are split by a through road.
- Additional criteria (for weighting of funding):
 - Category A* - where it is impossible not to move a proportion (either 25% or 50%) of total school / academy pupils between the campuses within the school day
 - Category B* - where the campuses are more than 400 metres apart

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

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

Additional Notes:

- 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.

3.6 The factor in our secondary funding formula for Private Finance Initiative (PFI) 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

Question 1 – Do you agree with continuing to use the 2015/16 existing formula structure to calculate delegated budgets for schools and academies for the 2016/17 financial year? If not, please explain the reasons why not. The values of each formula factor will not be confirmed until January 2016 and will depend on the outcomes of the discussions that take place at the Schools Forum during the autumn term.

Question 2 - Do you have any comments on the way the factors are used, as described in the proforma and paragraph 3.3?

Question 3 - Do you have any additional comments on the proposed approach for 2016/17 that you wish the Schools Forum to take into consideration?

4. Maintained Schools - De-Delegated Funds in 2016/17

4.1 The Finance Regulations continue to significantly restrict the extent to which the DSG can be held and managed centrally in support of schools. The Government's intention, in preparation for a national formula, 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' 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 provided centrally.

4.2 Previously, the Schools Forum has established de-delegated funds so as 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

4.3 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 2015/16 for the impact of maintained schools converting to academy status.

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

- ESD School Support Team
- Minority Ethnic School Support Team
- FSM Eligibility Assessments
- Fischer Family Trust – School Licences
- School Maternity / Paternity 'insurance'
- Trade Union Facilities Time
- Trade Union Health and Safety Representative Time
- School Staff Public Duties and Suspensions Fund

Further information on these funds is given in Appendix 4.

4.5 If funding is not de-delegated for the purposes listed above, then the funding will remain within 2016/17 school budgets for schools to provide for the cost of services from their own resources. 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.

4.6 Primary and secondary schools will be aware that the Minority Ethnic School Support Team is currently under review; the outcomes of this review will determine whether funds will continue to be de-delegated in 2016/17.

Question 4 – Should sums continue or cease to be de-delegated from maintained school budgets in 2016/17 for the purposes listed above? Please explain the reasons why.

5. DSG Schools Block Contingencies

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

5.2 In 2015/16, the Schools Forum agreed to hold the following permitted funds:

- A Growth Fund, to support expanding schools and academies
- A 'Costs of Re-Organisation' Fund, which allocates funding to match the cost of safeguarded salaries in maintained schools, 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 schools or maintained schools converting to academy status under a sponsored arrangement.
- An Exceptional Costs / Schools in Financial Difficult Fund for maintained schools.

5.3 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.

5.4 The proposed arrangements for 2016/17 are shown below and are unchanged from this financial year.

Details of these funds in 2015/16 and proposals for 2016/17

5.5 The Ringfenced Growth Fund

The value of the Growth Fund in 2015/16 was £2.7m, broken down between phases and types, as follows:

	Primary	Secondary	Total
Existing Known Expansions	£1,059,583	£0	£1,059,583
Existing Bulge Classes	£515,802	£0	£515,802
New Expansions	£350,000	£806,603	£1,156,603
Pre-Opening Costs	£0	£0	£0
Diseconomies of Scale	£0	£0	£0
Total Value 2015/16	£1,925,385	£806,603	£2,731,988

The proposed criteria for allocating funding from this contingency fund in 2016/17 are the same as in 2015/16:

- **Schools / academies permanently expanding by increasing the size of existing year groups:**
 - For basic need purposes, where an established 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 2015 census pupil numbers and a calculation of the composite 5/12 + 7/12 numbers, based on an estimate of the school's October 2016 Census. The school will then be allocated 80% of the value of the additional base amount per pupil, for the difference between the actual and the composite calculation. On 2015/16 values this would give £2,299 per pupil Primary, £3,322 Key Stage 3 and £3,417 Key Stage 4.
 - For basic need purposes, where a school / academy is permanently expanding by increasing the size of existing year groups for the first time in September 2016, the school / academy is allocated 80% of the value of the base amount per pupil for the additional planned intake number, for the remaining proportion of the year (7/12ths). In the following full year, in 2017/18, the school / academy would then be funded as above.
- **Bulge Classes added to existing year groups:**
 - **Full classes:** For basic need purposes, where a school / 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 a new permanently expanding schools above, at 80% of the base 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.
- **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 2nd 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 EFA 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 EFA, although these are still funded from the DSG.*

5.6 School Re-Organisation Costs - maintained primary and secondary schools

The value of this fund in 2015/16 was £0.13m, broken down between phases and types of re-organisation costs, as follows:

	Primary	Secondary	Total
School Staff Safeguarded Salaries	£129,705	£2,016	£131,721
Deficits of Closing Schools	£0	£0	£0
Total Value 2015/16	£129,705	£2,016	£131,721

The proposed criteria for allocating funding from this contingency fund in 2016/17 are unchanged from 2015/16:

- 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. The Forum has established the principle that provision for such costs are best met from one off available funds and / or retrospectively from the DSG in the following year

5.7 Exceptional Costs & Schools in Financial Difficulty - maintained primary and secondary schools

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

- Exceptional growth in pupil numbers, not picked up within the terms of the 'Growth Fund'
- 1 Form of Entry (or smaller) primary schools, where the cost of external HR investigations places the school in financial difficulty i.e. would reduce the forecasted carry forward balance below £20,000 *
- Priority 1 schools, where additional intervention / support is required as recommended by SIG / SSMG 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 2015/16 was £0.2m, broken down between phases, as follows:

	Primary	Secondary	Total
Total Value 2015/16	£150,000	£50,000	£200,000

The proposed criteria for allocating funding for exceptional pupil numbers growth (the most common call on this fund) in 2016/17 are unchanged from 2015/16 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 1?)
- Whether the school has received financial support or funding from elsewhere

Question 5 - Do you agree with the contingency funds, and their criteria, that are proposed to be held in the DSG in 2016/17? If not, please explain the reasons why not

6. The MFG and the Ceiling

6.1 The Minimum Funding Guarantee (MFG) will continue in 2016/17 at MINUS 1.5% i.e. the maximum reduction in funding for a school / academy will be limited to 1.5% of that school's 2015/16 funding per pupil.

6.2 The main reasons for schools or academies being on the MFG in 2016/17 are as follows:

- The MFG is protecting the school / academy against the impact of changes made in formula funding since April 2013 i.e. the school / academy was losing more than 1.5% per pupil due to the funding reforms in 2013/14 or the additional changes made in 2014/15, and this protection still has to fully work through.
- The MFG is continuing to protect a school / academy against the impact of formula change prior to April 2013, for instance following the mainstreaming of grants in 2011/12, where a school / academy was protected by the MFG in 2011/12, 2012/13, 2013/14, 2014/15 and 2015/16 on a sliding scale which has still to fully work through.
- The school / academy data recorded in the October 2015 Census e.g. FSM%, is significantly different (lower) from that recorded in previous censuses. This will result in a reduced total amount per pupil funding for the school, and the MFG would then protect against the drop.

6.3 As we have established in our previous funding reviews, the MFG must be afforded by the application of a ceiling. This ceiling caps the winners under the funding formulae at a % per pupil, which releases the value needed to cover the cost of the MFG. This is the only way that change can be afforded. The effect of the MFG, combined with the ceiling, is to pull the distribution of funding between schools and academies back towards how this stands now and it means that it will take longer for the budgets of the schools and academies that gain to realise these increases.

6.4 As was the case in 2015/16, the ceiling must be calculated on the same basis as the MFG and the % cap must be the same for primary and secondary schools / academies. We can choose whether to implement the ceiling by capping all growth over a certain % per pupil or by scaling back gains of winning schools / academies by a set amount proportion to the school's gain. It continues to be our view that the capping approach is much fairer and also follows the same approach that we have used previously. We are therefore, not proposing any change in the operation of the ceiling, but the value of the % cap cannot be set until the final cost of the MFG is known. Please note that the ceiling must not be applied to new and growing schools and academies (those with some empty year groups) which have opened in the last 7 years, so these schools and academies will not contribute to the ceiling in 2016/17.

7. Further Explanation of the Indicative Modelling

7.1 The modelling in Appendix 1 shows the impact of the proposals outlined in this consultation on primary and secondary schools and academies, based on maintaining a 'cash flat' position overall and using estimated October 2015 pupil numbers on roll and the October 2014 dataset from the EFA. The modelling is intended only to give an early estimate of individual allocations for 2016/17 from the Schools Block.

7.2 Please note that Appendix 1 focuses on the Schools Block and does not, at this stage, give a complete picture of individual delegated budgets. The modelling does not include Early Years Funding, Post 16 funding or funding from the High Needs Block. These are being / will be covered in separate consultations / communications.

7.3 The modelling shows the total 'variance' of 2016/17 estimated funding against 2015/16 actual funding. This total is also separated into formula funding, contingencies and Pupil Premium allocations so that the cause of variances can be better understood. The main factors behind these 'variances' are:

- A change in pupil numbers on roll (shown in the far right column)
- A reduction in (or ending of) the MFG for those schools that have previously been protected
- Changes in contingency allocations, in particular relating to the pupil numbers on roll at expanding schools / academies

7.4 Whether a school / academy is protected by the MFG, or is capped by the ceiling, is shown in the modelling. Schools and academies on the MFG should plan for this protection to reduce over time. Schools and academies on the ceiling may expect to receive the sum by which their budgets have been reduced eventually in future years. However, any future projections will be significantly influenced by the introduction of the National Fair Funding Formula, which will override any previous arrangements.

7.5 If you would like to discuss the modelling in more detail, or discuss the data on which allocations are calculated, please contact Sarah North.

Question 6 - Do you have any comments on the modelling?

8. Consultation Responses

8.1 Please use the responses form in Appendix 3 to submit your views on the proposals outlined in the consultation. There is space on this form for you to comment on any aspect of the proposals. If you wish to discuss these proposals in more detail, or have any specific questions, please contact either Sarah North, or Andrew Redding, using the contact details shown in paragraph 1.

8.2 Please ensure that your response is submitted by the deadline of **Friday 16 October 2015**. 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 agreement of the Schools Forum, the pro-forma, which will outline the structure of the funding formulae for primary and secondary schools and academies to be used to calculate budgets in 2016/17, will be submitted to the EFA by 30 October 2015. This pro-forma will then be checked for any areas of non-compliance by the EFA.

9.2 Schools and academies will complete the October Census on Thursday 1 October 2015. The dataset from this census will be available for us to analyse mid-December.

9.3 Discussions on the overall DSG funding position for 2016/17, the holding of de-delegated and contingency funds, the balance of funding between primary and secondary, whether to reduce factor values to offset cost pressures in the High Needs block, and the impact on schools of using the October 2015 Census dataset, will take place in the Schools Forum over the coming term. You are recommended to keep in touch with these discussions by visiting the Schools Forum webpage on the Council's Minute's site. It is anticipated that the Schools Forum will make its final recommendations on 2016/17 arrangements on Wednesday 6 January 2016.

10. Appendices

1. Appendix 1 – Illustrative Formula Modelling
2. Appendix 2 – Indicative EFA Pro-forma for 2016/17
3. Appendix 3 – Consultation Responses Form
4. Appendix 4 – Information on De-Delegated Funds

		2015/16 Actuals				2016/17 Estimated - see notes below				Variances				Adjustments		Formula Funding & Cont (Inc. MFG & Ceiling)				
Phase	School	Schools	Growth Fund /	Pupil	Total 2015/16 Actual	Formula Funding	Growth Fund /	Pupil	Total 2016/17 Estimated	Formula Funding	Growth Fund /	Pupil	Total Variances	MFG (included in figures to the left)	Ceiling (included in figures to the left)	2015/16 £app	2016/17 £app	£app Variance	Pupil Number Difference	
		Block Formula Funding	Safeguarded Salaries	Premium (July 2015)		(including MFG & Ceiling)	Safeguarded Salaries	Premium		(including MFG & Ceiling)	Safeguarded Salaries	Premium								
PRIMARY	Addingham Primary School	799,998	631	22,120	822,749	788,270	631	22,120	811,022	-11,727	0	0	-11,727	0	0	3,906	3,867	-38	-1	
PRIMARY	Aire View Infant School	947,920	12,071	43,080	1,003,071	970,914	29,559	44,136	1,044,610	22,994	17,489	1,056	41,539	30,780	0	4,017	4,034	17	9	
PRIMARY	All Saints' CE Primary School (Bradford)	2,487,466	38,895	293,040	2,819,401	2,628,185	33,590	304,291	2,966,066	140,719	-5,305	11,251	146,665	0	0	4,464	4,444	-20	33	
PRIMARY	All Saints' CE Primary School (Ilkley)	1,132,903	0	42,760	1,175,663	1,135,115	0	42,172	1,177,286	2,212	0	-588	1,623	0	0	3,563	3,581	18	-1	
PRIMARY	Allerton Primary School	1,767,274	0	232,760	2,000,034	1,779,242	0	234,387	2,013,630	11,968	0	1,627	13,596	0	0	4,178	4,196	18	1	
RECOUPMENT ACADEMY	Appleton Academy	1,415,667	0	225,720	1,641,387	1,528,966	0	243,460	1,772,426	113,299	0	17,740	131,038	0	0	3,826	3,832	6	29	
PRIMARY	Ashlands Primary School	1,487,127	74,284	63,940	1,625,351	1,505,176	51,655	64,520	1,621,351	18,049	-22,629	580	-4,001	0	0	3,640	3,595	-44	4	
PRIMARY	Atlas Community Primary School	1,029,716	0	116,160	1,145,876	1,030,618	0	116,160	1,146,778	901	0	0	901	0	0	4,880	4,884	4	0	
PRIMARY	Baildon CE Primary School	1,449,035	1,024	44,740	1,494,799	1,441,960	1,024	45,048	1,488,032	-7,075	0	308	-6,766	16,127	0	3,528	3,485	-43	3	
PRIMARY	Bankfoot Primary School	1,196,374	0	113,520	1,309,894	1,211,074	0	113,936	1,325,010	14,700	0	416	15,116	0	-10,331	4,335	4,420	85	-2	
PRIMARY	Barkerend Primary School	1,898,863	0	237,600	2,136,463	1,907,923	0	236,474	2,144,397	9,060	0	-1,126	7,934	0	0	4,521	4,532	11	1	
PRIMARY	Ben Rhydding Primary School	835,361	2,048	24,760	862,168	832,878	2,048	24,603	859,528	-2,483	0	-157	-2,640	0	0	3,824	3,848	24	-2	
PRIMARY	Blakehill Primary School	1,539,184	5,500	108,660	1,653,344	1,545,067	5,500	109,148	1,659,715	5,883	0	488	6,371	0	0	3,643	3,657	14	0	
PRIMARY	Bowling Park Primary School	2,852,856	0	406,820	3,259,676	2,853,307	0	417,040	3,270,348	451	0	10,220	10,671	0	0	4,458	4,472	15	-2	
PRIMARY	Brackenhill Primary School	1,707,656	38,895	216,480	1,963,032	1,834,903	2,687	234,710	2,072,300	127,247	-36,208	18,230	109,269	0	0	4,560	4,439	-122	31	
RECOUPMENT ACADEMY	Bradford Academy	1,334,273	0	143,880	1,478,153	1,566,930	0	170,974	1,737,905	232,658	0	27,094	259,752	0	0	3,901	3,908	6	59	
RECOUPMENT FREE SCH	Bradford Girls Grammar (Free School)	1,191,638	0	65,340	1,256,978	1,174,216	0	65,146	1,239,362	-17,422	0	-194	-17,617	0	0	3,500	3,505	5	-6	
PRIMARY	Burley & Woodhead CE Primary School	830,436	0	21,100	851,536	833,277	0	21,282	854,559	2,840	0	182	3,023	0	0	3,775	3,788	13	0	
PRIMARY	Burley Oaks Primary School	1,445,617	35,944	50,580	1,532,141	1,478,304	17,167	51,856	1,547,327	32,687	-18,777	1,276	15,187	0	0	3,528	3,446	-82	14	
PRIMARY	Byron Primary School	2,764,465	1,400	286,440	3,052,305	2,774,734	1,400	289,155	3,065,289	10,269	0	2,715	12,984	0	0	4,328	4,344	16	0	
PRIMARY	Carrwood Primary School	1,587,020	44,966	289,680	1,921,666	1,715,903	10,109	301,424	2,027,436	128,884	-34,857	11,744	105,771	0	0	5,422	5,262	-160	27	
PRIMARY	Cavendish Primary School	1,806,185	26,436	284,100	2,116,721	1,842,297	9,941	290,026	2,142,264	36,112	-16,495	5,926	25,543	0	-20,067	4,213	4,210	-3	5	
RECOUPMENT ACADEMY	Christ Church Primary Academy	946,640	0	128,040	1,074,680	975,246	0	146,742	1,121,989	28,606	0	18,702	47,309	0	0	4,805	4,781	-25	7	
PRIMARY	Clayton CE Primary School	1,532,958	2,048	134,640	1,669,645	1,542,062	2,048	134,640	1,678,750	9,105	0	0	9,105	0	0	3,717	3,730	13	1	
PRIMARY	Clayton Village Primary School	919,611	0	108,820	1,028,431	928,157	0	110,432	1,038,589	8,546	0	1,612	10,158	0	-317	4,530	4,595	65	-1	
PRIMARY	Copthorne Primary School	1,832,410	0	155,760	1,988,170	1,816,669	0	156,123	1,972,792	-15,741	0	363	-15,378	0	0	4,203	4,225	22	-6	
PRIMARY	Cottingley Village Primary School	1,546,666	0	147,380	1,694,046	1,551,978	0	146,726	1,698,705	5,312	0	-654	4,658	0	0	3,700	3,713	13	0	
PRIMARY	Crossflatts Primary School	1,462,142	27,667	70,840	1,560,649	1,460,736	6,992	70,547	1,538,275	-1,405	-20,675	-293	-22,373	0	0	3,573	3,537	-36	-2	
PRIMARY	Crossley Hall Primary School	2,363,966	26,824	281,740	2,672,530	2,447,025	0	290,014	2,737,039	83,059	-26,824	8,274	64,509	0	0	4,180	4,133	-46	20	
PRIMARY	Cullingworth Village Primary School	909,540	10,730	63,200	983,470	938,899	13,436	64,770	1,017,105	29,359	2,706	1,570	33,635	0	0	4,090	4,087	-3	8	
PRIMARY	Denholme Primary School	811,455	0	95,620	907,075	814,052	0	94,228	908,280	2,597	0	-1,392	1,206	0	0	4,248	4,262	14	0	
RECOUPMENT ACADEMY	Dixons Allerton Academy	604,031	110,415	26,400	740,846	844,483	85,415	39,489	969,387	240,452	-25,000	13,089	228,542	0	0	4,639	4,325	-314	61	
RECOUPMENT ACADEMY	Dixons Marchbank Academy	1,933,992	0	288,180	2,222,172	1,941,972	0	289,519	2,231,490	7,979	0	1,339	9,318	0	-13,570	4,540	4,580	40	-2	
RECOUPMENT FREE SCH	Dixons Music Primary	846,228	0	34,320	880,548	1,051,851	0	47,910	1,099,761	205,623	0	13,590	219,212	3,052	0	4,550	4,329	-221	57	
PRIMARY	East Morton CE Primary School	813,396	0	29,880	843,276	809,901	0	29,706	839,607	-3,495	0	-174	-3,669	0	0	3,837	3,857	20	-2	
PRIMARY	Eastburn Junior and Infant School	788,766	0	29,920	818,686	791,714	0	30,200	821,914	2,948	0	280	3,228	0	0	3,944	3,959	15	0	
PRIMARY	Eastwood Primary School	1,768,561	0	204,600	1,973,161	1,725,935	0	201,002	1,926,937	-42,626	0	-3,598	-46,224	0	0	4,378	4,381	3	-10	
PRIMARY	Eldwick Primary School	1,508,797	26,888	31,520	1,567,206	1,558,727	25,578	32,333	1,616,638	49,929	-1,310	813	49,433	0	0	3,474	3,467	-8	15	
PRIMARY	Fagley Primary School	1,049,977	26,102	143,160	1,219,238	1,076,080	9,199	147,958	1,233,237	26,103	-16,902	4,798	13,998	0	-15,113	5,076	5,048	-28	3	
PRIMARY	Farfield Primary	1,727,401	0	310,620	2,038,021	1,743,910	0	303,583	2,047,494	16,510	0	-7,037	9,473	0	-356	4,534	4,541	8	3	
PRIMARY	Farnham Primary School	1,843,614	13,533	191,400	2,048,547	1,836,778	13,533	189,174	2,039,485	-6,836	0	-2,226	-9,062	0	0	4,359	4,354	-6	-1	
PRIMARY	Fearnville Primary School	1,639,900	0	280,140	1,920,040	1,720,370	0	293,081	2,013,451	80,470	0	12,941	93,411	0	0	4,767	4,752	-15	18	
RECOUPMENT ACADEMY	Feversham Primary Academy	1,837,051	0	167,640	2,004,691	1,832,837	0	164,806	1,997,643	-4,213	0	-2,834	-7,048	0	0	4,481	4,503	23	-3	
PRIMARY	Foxhill Primary School	799,928	29,087	39,160	868,175	801,639	12,120	39,341	853,100	1,712	-16,967	181	-15,075	0	0	4,044	3,970	-74	0	
PRIMARY	Frizinghall Primary School	1,706,904	0	179,520	1,886,424	1,666,629	0	177,716	1,844,345	-40,275	0	-1,804	-42,079	0	0	4,235	4,230	-5	-9	
PRIMARY	Girlington Primary School	1,787,992	0	200,640	1,988,632	1,784,171	0	198,756	1,982,927	-3,822	0	-1,884	-5,706	0	0	4,420	4,438	18	-3	
PRIMARY	Glenaire Primary School	911,299	0	118,480	1,029,779	928,584	0	120,731	1,049,316	17,285	0	2,251	19,537	0	0	4,626	4,620	-6	4	
PRIMARY	Green Lane Primary School	2,726,970	18,812	283,800	3,029,582	2,674,960	18,812	281,936	2,975,707	-52,010	0	-1,864	-53,874	86,578	0	4,561	4,527	-34	-7	
PRIMARY	Greengates Primary School	919,482	0	88,700	1,008,182	928,690	0	89,458	1,018,148	9,208	0	758	9,966	0	-1,839	4,358	4,401	44	0	
PRIMARY	Grove House Primary School	1,596,669	0	141,240	1,737,909	1,612,971	0	141,914	1,754,885	16,302	0	674	16,976	0	-720	3,904	3,944	40	0	
RECOUPMENT ACADEMY	Harden Primary Academy	810,136	0	34,300	844,436	811,424	0	34,300	845,724	1,288	0	0	1,288	0	0	3,895	3,901	6	0	
PRIMARY	Haworth Primary School	867,624	40,573	67,180	975,377	930,052	27,194	74,004	1,031,250	62,428	-13,379	6,824	55,874	0	0	4,185	4,056	-129	19	
PRIMARY	Heaton Primary School	2,700,972	0	363,000	3,063,972	2,698,338	0	364,710	3,063,048	-2,634	0	1,710	-925	0	0	4,201	4,216	16	-3	
PRIMARY	Heaton St Barnabas' CE Primary School	1,668,465	0	150,480	1,818,945	1,677,690	0	149,360	1,827,050	9,225	0	-1,120	8,105	0	0	4,156	4,194	39	-2	
PRIMARY	High Crags Primary School	1,686,024	43,088	267,040	1,996,152	1,716,698	29,301	275,510	2,021,509	30,674	-13,786	8,470	25,357	0	0	4,456	4,409	-47	8	
PRIMARY	Hill Top CE Primary School	837,990	0	61,720	899,710	846,097	0	62,248	908,345	8,107	0	528	8,635	0	0	4,088	4,087	0	2	
PRIMARY	Hollingwood Primary School	1,668,689	2,048	164,580	1,835,317	1,661,813	2,048	164,580	1,828,440	-6,876	0	0	-6,876	0	0	3,940	3,952	12	-3	
PRIMARY	Holybrook Primary School	1,092,996	3,168	187,440	1,283,604	1,100,182	3,168	189,208	1,292,558	7,186	0	1,768	8,955	0	0	5,122	5,132	10	1	
PRIMARY	Holycroft Primary School	1,722,272	0	194,040	1,916,312	1,731,469	0	199,133	1,930,602	9,197	0	5,093	14,290	0	0	4,473	4,428	-45	6	
PRIMARY	Home Farm Primary School	1,646,906	0	222,340	1,869,246	1,674,224	0													

		2015/16 Actuals				2016/17 Estimated - see notes below				Variances				Adjustments		Formula Funding & Cont (Inc. MFG & Ceiling)			
Phase	School	Schools	Growth Fund /	Pupil	Total 2015/16 Actual	Formula	Growth Fund /	Pupil	Total 2016/17 Estimated	Formula	Growth Fund /	Pupil	Total Variances	MFG	Ceiling	2015/16 £app	2016/17 £app	£app Variance	Pupil Number Difference
		Block	Safeguarded Salaries	Premium (July 2015)		Funding (including MFG & Ceiling)	Safeguarded Salaries	Premium		Funding (including MFG & Ceiling)	Safeguarded Salaries	Premium		(included in figures to the left)	(included in figures to the left)				
PRIMARY	Lees Primary School		0	38,120	858,468		0	39,627	874,442	14,468	0	1,507	15,974	0	0	3,906	3,901	-5	4
PRIMARY	Ley Top Primary School	1,491,596	1,341	221,760	1,714,697	1,499,042	0	228,017	1,727,059	7,446	-1,341	6,257	12,362	0	0	4,566	4,570	5	1
PRIMARY	Lidget Green Primary School	2,270,047	0	267,960	2,538,007	2,248,075	0	263,435	2,511,511	-21,972	0	-4,525	-26,496	0	0	4,267	4,266	-1	-5
PRIMARY	Lilycroft Primary School	1,919,087	0	231,580	2,150,667	1,932,276	0	232,093	2,164,369	13,189	0	513	13,702	0	0	4,274	4,284	10	2
PRIMARY	Lister Primary School	1,762,199	0	153,120	1,915,319	1,776,098	0	154,246	1,930,344	13,899	0	1,126	15,024	0	0	4,298	4,311	13	2
PRIMARY	Long Lee Primary School	1,275,817	40,236	94,020	1,410,074	1,385,002	36,277	102,806	1,524,085	109,184	-3,959	8,786	114,012	0	0	4,113	4,049	-63	31
PRIMARY	Low Ash Primary School	1,587,557	0	149,440	1,736,997	1,599,969	0	150,114	1,750,083	12,412	0	674	13,086	0	0	3,789	3,800	11	2
PRIMARY	Low Moor CE Primary School	1,556,271	0	133,260	1,689,531	1,567,689	0	133,541	1,701,231	11,418	0	281	11,700	0	0	3,777	3,787	9	2
PRIMARY	Lower Fields Primary School	1,813,609	3,987	255,060	2,072,657	1,843,972	3,987	261,429	2,109,389	30,363	0	6,369	36,732	0	0	4,499	4,507	8	6
PRIMARY	Margaret McMillan Primary School	2,344,301	25,483	220,440	2,590,224	2,433,362	24,185	229,973	2,687,520	89,061	-1,298	9,533	97,296	0	0	4,232	4,230	-2	21
PRIMARY	Marshfield Primary School	1,738,145	0	150,480	1,888,625	1,739,210	0	149,400	1,888,610	1,065	0	-1,080	-15	0	0	4,178	4,191	13	-1
PRIMARY	Menston Primary School	1,337,538	45,215	26,400	1,409,152	1,351,303	39,859	26,535	1,417,697	13,765	-5,355	135	8,545	0	0	3,601	3,531	-70	10
RECOUPMENT ACADEMY	Merlin Top Primary Academy	1,516,203	0	282,480	1,798,683	1,570,147	0	290,577	1,860,724	53,944	0	8,097	62,041	0	0	4,875	4,861	-14	12
PRIMARY	Miriam Lord Community Primary School	1,649,640	0	150,480	1,800,129	1,608,031	0	144,632	1,752,664	-41,618	0	-5,848	-47,465	0	0	4,285	4,311	26	-12
PRIMARY	Myrtle Park Primary School	841,992	0	26,700	868,692	837,714	0	26,459	864,173	-4,278	0	-241	-4,519	0	0	3,845	3,860	16	-2
PRIMARY	Nessfield Primary School	1,595,046	0	124,080	1,719,126	1,611,473	0	123,187	1,734,661	16,428	0	-893	15,535	0	-3,940	3,853	3,892	40	0
PRIMARY	Newby Primary School	1,810,118	0	165,000	1,975,118	1,823,929	0	166,974	1,990,903	13,811	0	1,974	15,785	0	0	4,300	4,312	12	2
PRIMARY	Newhall Park Primary School	1,622,981	16,095	173,500	1,812,576	1,676,918	13,436	177,020	1,867,374	53,937	-2,658	3,520	54,798	0	0	4,246	4,236	-10	13
PRIMARY	Oakworth Primary School	1,448,149	0	81,980	1,530,129	1,454,587	0	81,610	1,536,197	6,438	0	-370	6,068	0	0	3,464	3,472	7	1
PRIMARY	Oldfield Primary School	350,868	0	10,560	361,428	366,252	0	10,966	377,218	15,384	0	406	15,790	12,581	0	7,161	6,782	-378	5
PRIMARY	Our Lady & St Brendan's Catholic Primary School	870,069	0	128,620	998,689	880,511	0	124,965	1,005,476	10,442	0	-3,655	6,786	0	-67,682	4,329	4,359	30	1
RECOUPMENT ACADEMY	Ox Lady of Victories Catholic Primary Academy	984,985	0	80,820	1,065,805	988,759	0	80,452	1,069,211	3,774	0	-368	3,406	0	-18,022	4,498	4,536	38	-1
PRIMARY	Oxenhope CE Primary School	791,191	0	30,940	822,131	786,950	0	31,082	818,032	-4,241	0	142	-4,099	0	0	3,804	3,820	16	-2
PRIMARY	Parkland Primary School	1,088,222	0	175,820	1,264,042	1,129,380	0	178,830	1,308,211	41,158	0	3,010	44,168	0	0	5,085	4,997	-88	12
PRIMARY	Parkwood Primary School	1,104,388	0	134,640	1,239,028	1,106,173	0	137,306	1,243,479	1,785	0	2,666	4,451	78,000	0	5,440	5,370	-71	3
PRIMARY	Peel Park Primary School	2,500,135	26,261	347,160	2,873,555	2,581,999	6,143	353,813	2,941,954	81,864	-20,118	6,653	68,399	0	0	4,432	4,402	-31	18
PRIMARY	Poplars Farm Primary School	895,436	0	64,680	960,116	921,035	0	64,987	986,021	25,598	0	307	25,905	0	-19,681	4,305	4,324	19	5
PRIMARY	Priestthorpe Primary School	817,952	0	70,680	888,632	822,019	0	70,033	892,052	4,067	0	-647	3,420	0	-12,661	4,110	4,110	0	1
PRIMARY	Princeville Primary School and Children's Centre	2,364,538	41,578	260,040	2,666,156	2,494,609	36,277	277,891	2,808,777	130,071	-5,300	17,851	142,622	0	0	4,415	4,394	-21	31
RECOUPMENT FREE SCH	Rainbow Primary Free School	1,234,749	0	112,200	1,346,949	1,373,778	0	121,091	1,494,870	139,030	0	8,891	147,921	0	0	4,880	4,803	-77	33
PRIMARY	Reevy Hill Primary School	979,464	0	184,800	1,164,264	970,598	0	178,132	1,148,729	-8,867	0	-6,668	-15,535	0	0	5,128	5,163	35	-3
PRIMARY	Riddlesden St Mary's CE Primary	1,544,718	30,162	133,620	1,708,499	1,612,295	14,780	140,321	1,767,396	67,577	-15,382	6,701	58,896	0	0	4,144	4,088	-56	18
PRIMARY	Russell Hall Primary School	857,370	0	88,720	946,090	862,357	0	88,720	951,077	4,987	0	0	4,987	0	0	4,102	4,106	4	1
RECOUPMENT ACADEMY	Ryecroft Primary Academy	1,358,442	34,508	223,080	1,616,030	1,439,392	23,775	238,129	1,701,297	80,950	-10,733	15,049	85,266	0	-14,027	5,484	5,419	-65	16
PRIMARY	Saltaire Primary School	1,562,318	0	114,100	1,676,418	1,563,526	0	113,310	1,676,836	1,208	0	-790	418	0	0	3,685	3,696	12	-1
PRIMARY	Sandal Primary School and Nursery	1,436,870	0	78,600	1,515,470	1,441,374	0	78,600	1,519,974	4,505	0	0	4,505	0	0	3,539	3,550	11	0
PRIMARY	Sandy Lane Primary School	1,266,645	0	108,240	1,374,885	1,279,236	0	109,291	1,388,527	12,592	0	1,051	13,642	0	-8,856	4,047	4,100	53	-1
RECOUPMENT ACADEMY	Shibden Head Primary Academy	1,504,929	9,570	84,900	1,599,399	1,504,507	0	84,342	1,588,849	-422	-9,570	-558	-10,550	0	0	3,564	3,548	-15	-1
PRIMARY	Shipleigh CE Primary School	917,038	0	75,820	992,858	915,342	0	75,820	991,162	-1,696	0	0	-1,696	0	0	4,285	4,297	12	-1
RECOUPMENT ACADEMY	Shirley Manor Primary Academy	883,848	0	120,120	1,003,968	913,607	0	122,133	1,035,740	29,759	0	2,013	31,773	0	0	4,993	4,965	-28	7
RECOUPMENT ACADEMY	Southmere Primary Academy	1,587,469	28,165	216,480	1,832,115	1,675,373	52,365	230,912	1,958,650	87,904	24,199	14,432	126,535	0	0	4,656	4,695	39	21
RECOUPMENT ACADEMY	Dixons Manningham Primary Academy	1,757,439	0	209,880	1,967,319	1,788,502	0	212,027	2,000,529	31,062	0	2,147	33,209	0	0	4,529	4,528	-2	7
RECOUPMENT ACADEMY	St Anne's Catholic Primary Academy	1,232,141	0	73,920	1,306,061	1,139,887	0	67,044	1,206,931	-92,254	0	-6,876	-99,130	0	-31,307	4,080	4,160	80	-28
PRIMARY	St Anthony's Catholic Primary School (Clayton)	866,162	0	71,700	937,862	874,527	0	71,074	945,601	8,364	0	-626	7,739	0	0	4,184	4,184	0	2
PRIMARY	St Anthony's Catholic Primary School (Shipleigh)	600,794	0	38,860	639,654	604,653	0	38,571	643,224	3,859	0	-289	3,570	0	0	4,731	4,761	30	0
PRIMARY	St Clare's Catholic Primary School	762,967	14,753	87,120	864,840	817,791	12,092	88,694	918,578	54,824	-2,661	1,574	53,737	0	0	4,922	4,911	-12	11
PRIMARY	St Columba's Catholic Primary School	1,624,586	4,024	177,480	1,806,089	1,639,358	0	181,346	1,820,704	14,772	-4,024	3,866	14,615	0	0	4,390	4,383	-6	3
PRIMARY	St Cuthbert & the First Martyrs' Catholic Primary	890,459	0	43,400	933,859	897,678	0	43,216	940,893	7,218	0	-184	7,034	0	-21,594	4,161	4,195	34	0
PRIMARY	St Francis' Catholic Primary School	831,073	0	60,820	891,893	829,496	0	59,678	889,174	-1,577	0	-1,142	-2,719	0	0	4,074	4,086	12	-1
PRIMARY	St James' Church Primary School	1,504,176	39,763	258,360	1,802,299	1,558,404	6,992	263,970	1,829,366	54,227	-32,771	5,610	27,067	0	0	4,840	4,729	-111	12
PRIMARY	St John The Evangelist Catholic Primary School	840,565	0	53,700	894,265	853,743	0	55,771	909,513	13,178	0	2,071	15,249	0	-22,879	4,003	4,027	24	2
PRIMARY	St John's CE Primary School	1,733,781	0	190,980	1,924,761	1,764,316	0	192,786	1,957,102	30,535	0	1,806	32,341	0	0	4,108	4,151	43	3
PRIMARY	St Joseph's Catholic Primary School (Bingley)	789,848	34,674	21,540	846,063	806,544	11,653	21,928	840,125	16,695	-23,021	388	-5,938	0	0	4,042	3,915	-127	5
PRIMARY	St Joseph's Catholic Primary School (Bradford)	1,521,865	11,187	186,120	1,719,172	1,506,751	4,661	182,836	1,694,248	-15,114	-6,526	-3,284	-24,925	0	0	4,496	4,525	29	-7
PRIMARY	St Joseph's Catholic																		

		2015/16 Actuals				2016/17 Estimated - see notes below				Variances				Adjustments		Formula Funding & Cont (Inc. MFG & Ceiling)			
Phase	School	Schools Block Formula Funding	Growth Fund / Safeguarded Salaries	Pupil Premium (July 2015)	Total 2015/16 Actual	Formula Funding (including MFG & Ceiling)	Growth Fund / Safeguarded Salaries	Pupil Premium	Total 2016/17 Estimated	Formula Funding (including MFG & Ceiling)	Growth Fund / Safeguarded Salaries	Pupil Premium	Total Variances	MFG (included in figures to the left)	Ceiling (included in figures to the left)	2015/16 £app	2016/17 £app	£app Variance	Pupil Number Difference
PRIMARY	Trinity All Saints CE Primary School	1,224,758	134,370	135,160	1,494,288	1,332,047	72,613	143,818	1,548,478	107,289	-61,757	8,658	54,190	0	-40,020	4,274	4,048	-226	29
PRIMARY	Victoria Primary School	1,039,810	29,558	88,440	1,157,809	1,087,727	34,950	91,530	1,214,206	47,916	5,391	3,090	56,397	0	-23,568	4,649	4,717	68	8
PRIMARY	Wellington Primary School	1,639,162	0	134,640	1,773,802	1,645,645	0	134,955	1,780,599	6,483	0	315	6,797	0	0	3,821	3,836	15	0
PRIMARY	Westbourne Primary School	1,790,926	9,016	198,000	1,997,942	1,754,516	9,016	196,504	1,960,035	-36,410	0	-1,496	-37,907	0	0	4,444	4,476	32	-11
PRIMARY	Westminster CE Primary School	2,433,312	24,142	317,460	2,774,914	2,530,956	14,780	324,324	2,870,060	97,644	-9,362	6,864	95,146	0	-11,710	4,476	4,435	-41	25
RECOUPMENT ACADEMY	Whetley Primary Academy	2,712,442	0	352,440	3,064,882	2,611,768	0	346,556	2,958,324	-100,674	0	-5,884	-106,558	0	-2,438	4,382	4,397	15	-25
PRIMARY	Wibsey Primary School	2,405,392	0	289,180	2,694,572	2,416,462	0	291,394	2,707,856	11,070	0	2,214	13,284	0	0	3,836	3,848	12	1
PRIMARY	Wilsden Primary School	1,448,456	0	66,000	1,514,456	1,471,905	0	65,842	1,537,747	23,449	0	-158	23,291	0	0	3,524	3,530	6	6
PRIMARY	Woodlands CE Primary School	503,840	0	19,060	522,900	506,645	0	19,740	526,385	2,805	0	680	3,484	2,275	0	4,845	4,825	-19	1
RECOUPMENT ACADEMY	Woodside Academy	1,741,155	41,260	299,480	2,081,894	1,743,971	50,000	274,493	2,068,463	2,816	8,740	-24,987	-13,431	802	0	4,642	4,600	-42	6
PRIMARY	Worth Valley Primary School	886,329	0	129,940	1,016,269	905,506	0	129,940	1,035,446	19,177	0	0	19,177	0	0	4,843	4,817	-27	5
PRIMARY	Worthinghead Primary School	855,234	0	101,480	956,714	865,997	0	100,493	966,491	10,763	0	-987	9,777	0	-1,900	4,363	4,418	55	0
PRIMARY	Wycliffe CE Primary School	1,026,471	54,603	96,780	1,177,854	1,133,867	74,793	106,103	1,314,763	107,396	20,190	9,323	136,909	0	0	4,324	4,301	-23	31
PRIMARY TOTALS		227,175,787	1,684,030	23,616,360	252,476,177	231,218,984	1,287,336	23,989,753	256,496,073	4,043,197	-396,694	373,393	4,019,896	296,176	-423,483	4,237	4,234	-3	899

Notes

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

2015/16 Actuals are based on figures included in the Section 251 Budget Statements, except for the Pupil Premium which uses the final figures updated in July by the DfE.

2016/17 Estimated figures are based on an estimate of October 2015 pupil numbers (with no changes in other Census data e.g. FSM% from October 2014)

Pupil Premium allocations ESTIMATES for 2016/17 are based on £1,320 per eligible Ever 6 FSM pupil, £300 per eligible service child, and £1,900 per eligible Adopted from Care pupil

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

		2015/16 Actual			2016/17 Estimated - see notes below			Variances					Adjustments		Formula Funding & Cont (Inc. MFG & Ceiling)				
Phase	School	Block Funding	Growth Fund / Safeguarded Salaries	Pupil Premium (July 2015)	Total 2015/16 Actual	Formula Funding (including MFG & Ceiling)	Growth Fund / Safeguarded Salaries	Pupil Premium	Total 2016/17 Estimated	Formula Funding (including MFG & Ceiling)	Growth Fund / Safeguarded Salaries	Pupil Premium	Total Variances	MFG (included in figures to the left)	Ceiling (included in figures to the left)	2015/16 £app	2016/17 £app	£app Variance	Pupil Number Difference from 15/16
RECOUPMENT ACADEMY	Appleton Academy	4,202,378	0	362,560	4,564,938	4,289,388	0	364,415	4,653,803	87,010	0	1,855	88,865	0	0	5,633	5,629	-4	16
RECOUPMENT ACADEMY	Beckfoot Academy	7,320,830	0	274,885	7,595,715	7,383,180	0	275,644	7,658,824	62,350	0	759	63,109	0	0	5,529	5,547	18	7
RECOUPMENT ACADEMY	Beckfoot Upper Heaton Academy	2,639,846	0	141,185	2,781,031	2,516,633	0	136,841	2,653,473	-123,214	0	-4,344	-127,558	146,392	0	6,666	6,658	-9	-18
RECOUPMENT ACADEMY	Belle Vue Girls' Academy	5,139,799	0	343,145	5,482,944	5,096,609	0	338,221	5,434,830	-43,190	0	-4,924	-48,114	0	0	5,698	5,707	9	-9
SECONDARY	Bingley Grammar School	7,193,849	2,048	295,425	7,491,321	7,221,153	2,048	295,228	7,518,429	27,305	0	-197	27,108	0	0	4,826	4,832	5	4
RECOUPMENT ACADEMY	Bradford Academy	6,007,226	0	476,708	6,483,934	5,987,712	0	472,780	6,460,492	-19,514	0	-3,927	-23,441	0	0	5,683	5,692	8	-5
RECOUPMENT FREE SCH	Bradford Girls Grammar (Free School)	2,343,494	0	116,935	2,460,429	2,571,776	0	129,810	2,701,586	228,281	0	12,875	241,156	0	-774	5,620	5,591	-29	43
SECONDARY	Buttershaw Business & Enterprise College	7,844,556	0	552,683	8,397,238	7,875,018	0	545,706	8,420,724	30,462	0	-6,977	23,485	0	0	5,920	5,939	19	1
SECONDARY	Carlton Bolling College	7,155,468	0	588,415	7,743,883	7,088,229	0	580,501	7,668,730	-67,238	0	-7,914	-75,152	0	0	6,023	6,043	20	-15
RECOUPMENT ACADEMY	Dixons Allerton Academy	6,680,147	0	527,173	7,207,319	6,656,038	0	522,261	7,178,299	-24,108	0	-4,912	-29,020	9,401	0	5,710	5,694	-16	-1
RECOUPMENT ACADEMY	Dixons City Academy	4,462,926	0	254,710	4,717,636	4,471,730	0	254,434	4,726,164	8,803	0	-276	8,527	0	0	5,358	5,368	11	0
RECOUPMENT FREE SCH	Dixons McMillan Academy	1,072,894	0	41,140	1,114,034	1,637,631	0	81,552	1,719,183	564,737	0	40,412	605,149	0	0	6,050	5,660	-390	112
RECOUPMENT FREE SCH	Dixons Trinity Academy	2,272,954	0	126,345	2,399,299	2,876,502	0	165,341	3,041,843	603,547	0	38,996	642,544	0	0	5,649	5,593	-57	112
RECOUPMENT ACADEMY	Bradford Forster Academy	801,910	0	0	801,910	2,015,273	0	41,344	2,056,616	1,213,363	0	41,344	1,254,707	0	0	6,546	6,172	-374	204
RECOUPMENT ACADEMY	Feversham College	3,121,753	0	213,210	3,334,963	3,231,626	0	222,852	3,454,478	109,873	0	9,642	119,515	24,722	0	5,969	5,876	-93	27
RECOUPMENT ACADEMY	Grange Technology College	9,641,288	0	689,563	10,330,850	9,692,552	0	695,563	10,388,115	51,264	0	6,000	57,265	0	0	6,479	6,501	21	3
SECONDARY	Hanson School	8,112,329	0	557,723	8,670,051	8,132,454	0	550,026	8,682,480	20,126	0	-7,697	12,429	0	-202,383	5,908	5,962	54	-9
RECOUPMENT ACADEMY	Ilkley Grammar School	5,517,706	0	121,180	5,638,886	5,516,970	0	120,685	5,637,655	-736	0	-495	-1,231	0	0	4,523	4,530	7	-2
SECONDARY	Immanuel College	5,958,832	992	321,635	6,281,459	5,995,753	992	325,437	6,322,183	36,922	0	3,802	40,724	0	0	5,042	5,048	6	6
RECOUPMENT FREE SCH	International Food & Travel Studio	266,543	0	3,273	269,815	267,568	0	2,067	269,634	1,025	0	-1,206	-181	0	0	22,212	22,297	85	0
RECOUPMENT FREE SCH	Dixons Kings Academy	4,569,961	0	288,280	4,858,241	4,984,829	0	364,993	5,349,822	414,868	0	76,713	491,581	0	0	5,614	5,607	-7	75
SECONDARY	Laisterdyke Business and Enterprise College	5,315,114	0	428,230	5,743,344	5,237,230	0	412,283	5,649,513	-77,884	0	-15,947	-93,831	0	0	5,945	5,958	13	-15
SECONDARY	Oakbank School	7,098,899	0	485,998	7,584,897	7,033,894	0	480,658	7,514,553	-65,005	0	-5,339	-70,344	0	0	5,216	5,222	6	-14
RECOUPMENT ACADEMY	Oasis Academy Lister Park	4,680,074	0	386,683	5,066,756	4,709,880	0	387,166	5,097,046	29,807	0	483	30,290	0	0	6,000	6,008	7	4
RECOUPMENT FREE SCH	One In A Million (Free School)	1,011,063	0	65,450	1,076,513	1,348,264	0	97,620	1,445,884	337,201	0	32,170	369,371	0	0	6,696	6,390	-306	60
SECONDARY	Parkside School	4,243,911	0	202,560	4,446,471	4,279,605	0	204,850	4,484,455	35,694	0	2,290	37,984	0	0	4,861	4,869	7	6
SECONDARY	Queensbury School	4,812,497	0	309,750	5,122,247	4,757,748	0	301,874	5,059,622	-54,749	0	-7,876	-62,625	0	-5,596	5,353	5,419	66	-21
RECOUPMENT ACADEMY	Samuel Lister Academy	3,581,591	0	292,188	3,873,778	3,574,729	0	287,342	3,862,071	-6,862	0	-4,846	-11,708	0	0	6,030	6,028	-1	-1
SECONDARY	St Bede's & St Joseph's Catholic College	8,823,225	0	462,420	9,285,645	8,491,437	0	442,874	8,934,311	-331,788	0	-19,546	-351,334	0	0	5,347	5,307	-40	-50
SECONDARY	The Holy Family Catholic School	3,937,711	0	186,965	4,124,676	3,943,209	0	187,210	4,130,420	5,499	0	245	5,744	0	0	5,278	5,286	7	0
SECONDARY	Thornton Grammar School	6,725,428	0	467,243	7,192,670	6,550,230	0	453,841	7,004,070	-175,198	0	-13,402	-188,600	0	0	5,169	5,178	9	-36
SECONDARY	Titus Salt School	7,252,897	1,024	400,398	7,654,318	7,227,545	1,024	394,411	7,622,980	-25,351	0	-5,986	-31,337	0	0	5,936	5,984	48	-14
SECONDARY	Tong High School	8,165,572	0	727,725	8,893,297	7,908,279	0	695,177	8,603,456	-257,293	0	-32,548	-289,841	0	-57,729	6,460	6,525	65	-52
RECOUPMENT ACADEMY	University Academy Keighley	4,218,892	0	246,840	4,465,732	4,501,098	0	267,374	4,768,473	282,206	0	20,534	302,741	213,273	0	7,324	7,202	-123	49
SECONDARY TOTALS		172,193,562	4,064	10,958,618	183,156,243	175,071,774	4,064	11,098,380	186,174,217	2,878,212	0	139,762	3,017,974	393,788	-266,481	5,651	5,658	8	467

Notes

This analysis excludes High Needs and Post 16 funding (pre-16 mainstream DSG funding only). Post 16 funding is excluded as the Authority does not see this funding for academies

2015/16 Actuals are based on figures included in the Section 251 Budget Statements, except for the Pupil Premium which uses the final figures updated in July by the DfE

2016/17 Estimated figures are based on an estimate of October 2015 pupil numbers (with no changes in other Census data e.g. FSM% from October 2014)

Pupil Premium allocations are based on £935 per eligible Ever 6 FSM pupil, £300 per eligible service child, and £1,900 per eligible Adopted from Care pupil in both 2015/16 and 2016/17

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

Local Authority Funding Reform Proforma

LA Name:	Bradford
LA Number:	380

Pupil Led Factors

1) Basic Entitlement Age Weighted Pupil Unit (AWPU)	Reception uplift	Yes	Pupil Units			83.00				
	Description	Amount per pupil		Pupil Units		Sub Total	Total	Proportion of total pre MFG funding (%)	Notional SEN (%)	
	Primary (Years R-6)	£2,879.17		54,913.00		£158,103,638	£288,178,093	38.65%	7.51%	
	Key Stage 3 (Years 7-9)	£4,157.97		18,950.50		£78,795,538		19.26%	6.28%	
	Key Stage 4 (Years 10-11)	£4,276.57		11,990.67		£51,278,917		12.53%	6.28%	
	Description	Primary amount per pupil	Secondary amount per pupil	Eligible proportion of primary NOR	Eligible proportion of secondary NOR	Sub Total	Total	Proportion of total pre MFG funding (%)	Primary Notional SEN (%)	Secondary Notional SEN (%)
2) Deprivation	FSM6 % Primary	£1,030.06		18,555.40		£19,113,210	£64,144,152	15.68%	23.08%	
	FSM6 % Secondary		£961.26		11,860.23	£11,400,778			10.16%	
	IDACI Band 1	£305.12	£394.01	3,809.27	2,180.58	£2,021,447			22.45%	19.18%
	IDACI Band 2	£381.40	£492.51	4,698.85	2,725.68	£3,134,563			22.45%	19.18%
	IDACI Band 3	£457.68	£591.01	11,769.69	6,867.91	£9,445,756			22.45%	19.18%
	IDACI Band 4	£533.96	£689.51	11,241.93	6,529.69	£10,505,043			22.45%	19.18%
	IDACI Band 5	£686.52	£886.51	4,499.95	2,345.78	£5,168,883			22.45%	19.18%
	IDACI Band 6	£839.08	£1,083.52	2,414.98	1,225.74	£3,354,471	22.45%	19.18%		
	Description	Primary amount per pupil	Secondary amount per pupil	Eligible proportion of primary NOR	Eligible proportion of secondary NOR	Sub Total	Total	Proportion of total pre MFG funding (%)	Primary Notional SEN (%)	Secondary Notional SEN (%)
3) Looked After Children (LAC)	LAC X March 14	£0.00		473.48		£0	£4,631,472	0.00%	0.00%	
4) English as an Additional Language (EAL)	EAL 3 Primary	£164.86		13,080.07		£2,156,384		0.87%	0.00%	
	EAL 3 Secondary		£1,170.03		1,196.73	£1,400,211			0.00%	
5) Mobility	Pupils starting school outside of normal entry dates	£1,615.88	£1,925.59	617.13	40.33	£1,074,876	0.26%	0.00%	0.00%	
	Description	Weighting	Amount per pupil	Percentage of eligible Y1-2 and Y3-6 NOR respectively	Eligible proportion of primary and secondary NOR respectively	Sub Total	Total	Proportion of total pre MFG funding (%)	Primary Notional SEN (%)	Secondary Notional SEN (%)
6) Prior attainment	Low Attainment % new EFSP	46.16%		21.81%			£7,534,912	1.84%		
	Low Attainment % old FSP 73		£242.46	21.81%	11,955.43	£2,898,756			100.00%	
	Secondary pupils not achieving (KS2 level 4 English or Maths)		£496.91		9,329.93	£4,636,156			100.00%	

Other Factors

Factor	Lump Sum per Primary School (£)	Lump Sum per Secondary School (£)	Lump Sum per Middle School (£)	Lump Sum per All-through School (£)	Total (£)	Proportion of total pre MFG funding (%)	Notional SEN (%)	
7) Lump Sum	£175,000.00	£175,000.00			£33,425,000	8.17%	0.00%	0.00%

8) Sparsity factor	£0.00	£0.00	£0.00	£0.00	£0	0.00%	0.00%	0.00%
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Please provide alternative distance and pupil number thresholds for the sparsity factor below. Please leave blank if you want to use the default thresholds. Also specify whether you want to use a tapered lump sum for one or both of the phases.

Primary distance threshold (miles)		Primary pupil number average year group threshold		Fixed or tapered sparsity primary lump sum?	Fixed	
Secondary distance threshold (miles)		Secondary pupil number average year group threshold		Fixed or tapered sparsity secondary lump sum?	Fixed	
Middle schools distance threshold (miles)		Middle school pupil number average year group threshold		Fixed or tapered sparsity middle school lump sum?	Fixed	
All-through schools distance threshold (miles)		All-through pupil number average year group threshold		Fixed or tapered sparsity all-through lump sum?	Fixed	

9) Fringe Payments		£0	0.00%	
10) Split Sites		£159,626	0.04%	0.00%
11) Rates		£5,305,837	1.30%	0.00%
12) PFI funding		£5,724,059	1.40%	0.00%
13) Sixth Form		£0	0.00%	0.00%

14) Exceptional circumstances (can only be used with prior agreement of EFA)

Circumstance	Total (£)	Proportion of total pre MFG funding (%)	Notional SEN (%)	
Additional lump sum for schools amalgamated during FY15-16	£0	0.00%	0.00%	0.00%
Additional sparsity lump sum for small schools	£0	0.00%	0.00%	
Exceptional Circumstance3	£0	0.00%	0.00%	
Exceptional Circumstance4	£0	0.00%	0.00%	
Exceptional Circumstance5	£0	0.00%	0.00%	
Exceptional Circumstance6	£0	0.00%	0.00%	

Total Funding for Schools Block Formula (excluding MFG Funding Total) (£)	£409,103,151	100.00%	£40,229,196
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15) Minimum Funding Guarantee (MFG is set at -1.5%)	£689,964		
Apply capping and scaling factors? (gains may be capped above a specific ceiling and/or scaled)	Yes		
Capping Factor (%)	0.77%	Scaling Factor (%)	100.00%
Total deduction if capping and scaling factors are applied	-£689,964		
	Total (£)	Proportion of Total funding(%)	
MFG Net Total Funding (MFG + deduction from capping and scaling)	£0	0.00%	

High Needs threshold (only fill in if, exceptionally, a high needs threshold different from £6,000 has been approved)	
Additional funding from the high needs budget	£688,663.71
Growth fund (if applicable)	£1,728,692.00
Falling rolls fund (if applicable)	£0.00

Total Funding For Schools Block Formula	£409,103,151
% Distributed through Basic Entitlement	70.44%
% Pupil Led Funding	89.09%
Primary: Secondary Ratio	1 : 1.33

RESPONSES FORM

CONSULTATION & INFORMATION ON PRIMARY & SECONDARY FUNDING FORMULAE 2016/17 FINANCIAL YEAR

Name _____ School / Academy _____

Please choose your phase below:

PRIMARY SECONDARY

THE DEADLINE FOR RESPONSES TO THIS CONSULTATION IS FRIDAY 16 OCTOBER 2015

Please send completed questionnaire responses to:

School Funding Team (FAO Sarah North)
City of Bradford Metropolitan District Council
Britannia House (5th Floor)
Hall Ings
Bradford
BD1 1HX

Tel: 01274 434173 / 01274 432678

Fax: 01274 435054

Email: sarah.north@bradford.gov.uk or 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.

Summary of 2016/17 Proposed Formulae (Section 3)

Question 1 – Do you agree with continuing to use the 2015/16 existing formula structure to calculate delegated budgets for schools and academies for the 2016/17 financial year? If not, please explain the reasons why not.

Strongly Agree On Balance Agree (some reservations) Strongly Disagree

If not, please provide further explanation here:

Question 2 - Do you have any comments on the way the factors are used, as described in the proforma and paragraph 3.3?

Please provide any comments here:

Question 3 - Do you have any additional comments on the proposed approach for 2016/17 that you wish the Schools Forum to take into consideration?

Please provide any additional comments here:

De-Delegated Funds in 2016/17 – Maintained Schools only (Section 4)

Question 4 – Should sums continue or cease to be de-delegated from maintained school budgets in 2016/17 for the purposes listed below? Please explain the reasons why.

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

Please provide any additional comments here:

DSG Schools Block Contingencies (Section 5)

Question 5 - Do you agree with the contingency funds, and their criteria, that are proposed to be held in the DSG in 2016/17? If not, please explain the reasons why not

Strongly Agree On Balance Agree (some reservations) Strongly Disagree

If not, please provide further explanation here:

Indicative Modelling (Section 7)

Question 6 - Do you have any comments on the modelling?

Please send completed questionnaire responses to Sarah North / Andrew Redding by Friday 16 October:

- *E-mail:* **sarah.north@bradford.gov.uk / andrew.redding@bradford.gov.uk**
- *Fax:* **01274 435054**
- *Post:* **School Funding Team (FAO Sarah North)
City of Bradford Metropolitan District Council
Britannia House (5th Floor)
Hall Ings
Bradford
BD1 1HX**

Appendix 4: Purpose of each De-Delegated Fund Proposed in 2016/17

1. ESD School Support Team:

As a specialist teaching support service, the ESD 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 ESD
- A range of bespoke training

If this de-delegated fund is not held in 2016/17, primary schools will need to replace these services from their own resources, for example, by directly employing specialist staff, or by purchasing services, on an individual basis or as a cluster of schools.

2. Minority Ethnic School Support Team:

This fund supports the staffing costs of the Authority's Ethnic Minority Achievement Team. Working in partnership with schools, this Team provides expertise and support at school level focused on advising and training school staff to meet the needs of minority ethnic pupils, including new to English pupils, and supporting schools in delivering strategies to close the achievement gap of EAL pupils.

Examples of the types of support that schools access are:

- Personalised audit of school's provision for EAL learners with recommendations which will meet both the needs of the school and the requirements of OFSTED
- Developing whole school language development programme focusing on EAL but benefiting all learners
- Training for teaching and non-teaching staff on working with EAL learners both in workshops and in the classroom
- Demonstration of resources and strategies which meet the needs of EAL learners and accelerate their achievement
- Assessing, targeting and tracking systems for EAL learners
- Developing effective school and community relationships
- Support to put systems & training in place for New Arrivals including; Induction; Assessment; Early Days Withdrawal & In-class Language Support
- Innovative speaking and listening strategies using new and emerging technologies
- Bespoke residency packages to work alongside Senior Leadership Teams
- Development of language across the curriculum for advanced bilingual learners
- Provision of parental engagement in school

Primary and secondary schools will be aware that the Minority Ethnic School Support Team is currently under review; the outcomes of this review will determine whether funds will continue to be de-delegated in 2016/17. If this de-delegated fund is not held in 2016/17, maintained schools will need to replace these services from their own resources, for example, by directly employing specialist staff, or by purchasing services, on an individual basis or as a cluster of schools.

3. 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 2016/17, schools will either need to undertake FSM assessment themselves or purchase replacement services.

4. 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.

If this de-delegated fund is not held in 2016/17, maintained schools will need to purchase their own licences to access FFT data, on an individual basis or as a cluster of schools.

5. School Maternity / Paternity 'insurance':

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.

If this de-delegated fund is not held in 2016/17, maintained 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.

6. 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 2016/17, 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.

7. 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 Teacher 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 Teacher Trade Union, 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 to the Teacher representatives to carry out inspections and this includes appropriate training. In addition, the Teacher 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 2016/17, individual schools will need to consider how they will meet their employer statutory obligations around health and safety.

8. 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.

If this de-delegated fund is not held in 2016/17, maintained schools will not be reimbursed for the salary cost of staff and would have to make alternative arrangements to manage this cost.

2015/16 De-Delegated Funds: Values

The table below shows the total values that were de-delegated from individual school budgets in the current financial year. If these funds continue to be de-delegated in 2016/17, we would expect the values of funds to match anticipated cost pressures, and to reduce from the 2015/16 values shown below for the impact of maintained schools converting to academy status.

Fund	Early Years £	Primary £	Secondary £	Total Value £
ESBD School Support Team	£0	£426,361	£0	£426,361
Minority Ethnic School Support Team	£0	£200,792	£74,359	£275,151
FSM Eligibility Assessments	£0	£87,444	£33,532	£120,975
Fischer Family Trust – School Licences	£0	£24,491	£9,069	£33,560
School Maternity / Paternity ‘insurance’	£60,245	£1,039,277	£252,921	£1,352,443
Trade Union Facilities Time	£17,800	£211,463	£78,310	£307,573
Trade Union Health and Safety Rep Time	£2,720	£32,313	£11,967	£47,000
School Staff Public Duties & Suspensions Fund	£3,660	£43,477	£16,101	£63,238
Total	£84,425	£2,065,618	£476,259	£2,626,301

These total values were de-delegated from 2015/16 individual maintained school budgets on a flat amount per pupil basis, with the exception of FSM Eligibility Assessments, which has been de-delegated on an amount per Ever 6 FSM formula pupil, as follows:

Fund	Early Years £app	Primary £app	Secondary £app
ESBD School Support Team	£0	£9.20	£0
Minority Ethnic School Support Team	£0	£4.33	£4.33
FSM Eligibility Assessments	£0	£5.80	£5.14
Fischer Family Trust – School Licences	£0	£0.53	£0.53
School Maternity / Paternity ‘insurance’	£15.44	£22.42	£14.73
Trade Union Facilities Time	£4.56	£4.56	£4.56
Trade Union Health and Safety Rep Time	£0.70	£0.70	£0.70
School Staff Public Duties & Suspensions Fund	£0.94	£0.94	£0.94
Total	£21.64	£48.48	£30.93

Each maintained school has contributed from its 2015/16 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. If these amounts were not de-delegated, a school’s budget would increase, though the cost of replacing services would also fall to the school’s budget.

SCHOOLS FORUM AGENDA ITEM

For Action

For Information

**Brief Description of Item**

This report provides an updated analysis of the spending of the Pupil Premium. This analysis is aimed at identifying effective practice, so that this can be shared in support of improving outcomes for children.

Date (s) of any Previous Discussion at the Forum

A report from the Summer 2014 survey of statements was presented to the Forum on 17 September 2014.

Background / Context

The Pupil Premium is now well established as an additional grant allocation to all schools and academies. The value of Grant has increased in each year since its introduction and this has now become a sizable revenue stream for Bradford (£35m for Bradford schools and academies in 2015/16). The Grant is not ringfenced at school level, but schools are expected to target this resource to underachieving groups, especially pupils from more deprived backgrounds, in support of significantly reducing attainment gaps; rather than just absorbing this into general school spending. Use and impact of Pupil Premium features strongly in Ofsted school inspections. Every Governing Body is required to publish annually on the school's website a statement, which explains how the Pupil Premium is being / has been spent, and what impact this has had. The Local Authority carried out a survey of Bradford maintained school statements during summer 2014 and presented this to the Schools Forum on 17 September 2014. This survey has been repeated during Summer 2015, and this time has included the statements published by academies and free schools in the District.

Ofsted has compiled 2 reports (in 2013 and updated in 2014), which outline its findings on the use of the Pupil Premium nationally from its inspections. Ofsted's view at July 2014 is that schools are spending this Grant more effectively and that it is now starting to have an impact. In addition, Ofsted has found:

- The most common type of expenditure is staffing. Spend on catch up type activities (booster classes, extended activities, holiday clubs etc) is also common, alongside pastoral support and enrichment activities to raise aspirations
- Schools are commonly using the Grant for more focused sessions concentrating on English and maths
- There is much similarity in the types of expenditure across primary and secondary schools; though secondary schools are more likely to employ teachers, primary to employ teaching assistants

Ofsted's key finding is that Pupil Premium is having the greatest impact where it is carefully targeted, where impact is rigorously monitored and where strategies have changed as a result of an impact assessment evidencing that an activity is not working. The most common Ofsted criticism in inspections is that impact of spending is not evaluated and / or the school's leadership has not ensured that money allocated is being spent on its intended purpose (weakness of leadership and management).

A report from the National Audit Office, in June 2015, found that, "many schools spend some of the Pupil Premium on approaches that may not be cost effective...reducing the funding's impact....72% of schools provided individual tuition, which is highly effective but relatively costly...63% have sought to improve feedback between teachers and pupils, which is both effective and low cost...However, 71% of schools employ extra teaching assistants to support disadvantaged pupils, a high cost approach which will only improve results if schools learn to deploy these staff more effectively".

The Local Authority's aim in conducting a survey of statements in Summer 2014 was to seek to assess whether:

- a) A school's statement acts a window on the quality of the school's strategy and therefore, can tell us something about effectiveness and impact in that school
- b) A school's evaluation of the impact is strong enough and from this whether we can see that the Pupil Premium is making a difference, as Ofsted says it is nationally
- c) There is a clear link between types of expenditure and outcomes
- d) From identifying this, good practice can be shared.

Accepting the survey's limitations, as reported to the Schools Forum in September 2014, we found that:

Background Continued

- The styles, content and quality of statements vary significantly. There are some strong statements, but also some poor ones. A main area for improvement is the quality of evaluation of impact, and how this then influences change in strategies. Another area for improvement is how clear schools are about how much is spent on what activity. The highest quality statements were those written in table format, that presented the value of spend, what the intended impact of spend is, how and when impact will be assessed, what impact previous assessments have found, and who in the school has responsibility, by spending area.
- The majority of schools were not found to do this within their statements. One of the more surprising findings is the low proportion of schools with larger allocations that do not breakdown their spending by type of activity (and therefore, do not present an evaluation of impact in this way). It may be that schools deliberately keep their statements simple, and have more detailed working analysis. However, the survey of the differences in the characteristics of statements between the schools most and least successful in narrowing the FSM attainment gap between 2012 and 2013 suggests generally that where the analysis of spend and impact is weak in the statement, the impact of the Pupil Premium in narrowing the gap is weaker.
- The pattern of common types of expenditure in Bradford correlates well with Ofsted's findings nationally. There may be some relationship between types of spending and impact. However, better data is needed on the distribution of spending by schools in order to evaluate this. It does appear that schools that focus spending on a smaller number of key activities, rather than distributing funding across many areas, had better success in reducing the attainment gap between 2012 and 2013.
- Although not true of all, this survey does suggest that there is some relationship between the quality of a school's statement and the effectiveness of a school's strategy. As such, analysis of statements does provide some window into the effectiveness of a school in its spending and monitoring of the impact of Pupil Premium. As found by Ofsted, it appears that the strength of leadership and the clarity of strategy, which can be gauged from the statements, are critical.
- Accepting the limitations (and in some ways the simple nature) of this survey, its findings can be used in discussions with schools.

Details of the Item for Consideration

During Summer 2015, the Local Authority has completed the survey again, including academies and free schools in Bradford, collecting and analysis the latest statements that could be found on school websites. The survey has been completed on the same basis as in 2014, asking the same set of questions, which are based on the findings of Ofsted in its July 2014 report. The key aims of the 2015 survey have been to assess the extent to which reporting and impact analysis by schools and academies have changed (improved) over the last year and to assess whether any significant changes in patterns of expenditure can be detected.

An analysis of the findings of the 2015 survey is shown in Appendix 1. The results from Summer 2014 are shown alongside so that visual comparisons can be made. The analysis is broken into 4 sections:

1. General characteristics of statements (the results of the 15 assessments)
2. How these characteristics of statements differ depending on the values of Pupil Premium received
3. General patterns of spending (% of schools that spend on the same type of activity)
4. Proportion of spending, where it has been possible to extract from statements the values of spending by type of activity (i.e. what schools are mainly spending their Pupil Premium allocations on).

The characteristics of statements and patterns of spending identified in 2015 are generally very similar to those identified last year. The more significant changes are:

- An increase in the % of statements that explain how Pupil Premium spending links in with wider school strategies for raising attainment and improving outcomes (question 5).
- A growth in the % of statements that specifically reference the use of Pupil Premium in narrowing the attainment gap of pupils from more deprived backgrounds (question 8).
- An increase in the inclusion of impact evaluation and an improvement in the quality of this evaluation (this is seen across questions 8-13).
- An increase in the proportion of statements that list spending by activity (question 15).
- A larger number of statements that show spending activities and impact assessments in table format and that include the presentation of attainment data, including in graphical form.
- A change in some patterns of spending, with a greater % of schools reporting spend on subsidies (expected as a result of the ceasing of the Council's necessitous clothing scheme), on behaviour support / pastoral / nurture activities and staffing, and on attendance initiatives, including attendance managers. A smaller % of schools reported spending on enrichment and extended activities.
- An increase in the mean average number of activities each school uses Pupil Premium Grant for; increased from 4.5 in 2014 to 5.7 in 2015. This is a useful figure to monitor, as some correlation was identified in the 2014 survey in impact being greater in schools that focused spending on a smaller

Details of the Item for Consideration

number of targeted activities.

- For schools where we can extract the value of spending by type of activity, the statements indicate a reduction in spending on vocational and off site provision. However, any conclusions we can draw are limited as we only have spending data by activity for 80 out of 175 schools and academies. We need a greater number of schools in the future to list their spending by type of activity in order to form clearer wider conclusions, indicated by the Ofsted and the National Audit Office reports, about relationships between type of activity and impact specifically in Bradford.

This information is presented for awareness as part of the Forum's on-going consideration of the impact of spending decisions and the impact of additional monies delegated to schools. The Authority will continue to complete a survey each summer. The results of the survey are used in discussions with individual schools and are also incorporated into training materials, especially for governors.

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

The Pupil Premium is a grant that is allocated separately from the DSG. However, the findings of this survey are intended to better inform the Forum's overall financial decisions making.

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

The District's key strategic aims are to:

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

This item directly supports the raising of attainment of vulnerable groups and narrowing the attainment gap.

Recommendations

The Schools Forum is asked to consider and to note the information presented

List of Supporting Appendices / Papers

Appendix 1 – General Analysis / Patterns

Contact Officer (name, telephone number and email address)

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Survey of Pupil Premium Statements Summer 2015 - General Analysis / Patterns

Number of School and Academy websites surveyed over Summer 2015 189
 % of School / Academy Sites where Pupil Premium Statements were found 93%
 Number of Schools / Academies where the statements could not be found / website not available 14

1. General Results - Statement Characteristics

(out of 175 Statements)	Summer 2015		Summer 2014	
	YES	NO	YES	NO
1. The PP Statement was easy to find	91%	9%	92%	8%
2. The PP Statement was published with a more detailed PP Policy	29%	71%	24%	76%
3. The quality of the PP Statement gives the impression that the school is taking its PP responsibilities seriously, rather than the impression of a just satisfying a 'tick box' exercise	82%	18%	82%	18%
4. The PP Statement or Policy refers to the involvement of Governors in decisions and monitoring	33%	67%	30%	70%
5. The PP Statement or Policy refers to the way the PP links with other school strategies	37%	63%	28%	72%
6. The PP Statement or Policy makes it clear that PP spending is targeted (not just a general budget resource)	81%	19%	83%	17%
7. The PP Statement or Policy makes it clear that improving literacy and maths are key priorities	70%	30%	69%	31%
8. The PP Statement or Policy makes specific reference to narrowing the FSM attainment gap	71%	29%	65%	35%
9. The PP Statement or Policy gives confidence that impact is closely monitored	64%	36%	58%	42%
10. The PP Statement includes <i>some</i> evaluation of impact	85%	15%	81%	19%
11. Where the answer to 10. is YES - the evaluation of impact is strong	30%		15%	
12. Where the answer to 10. is YES - the evaluation of impact is weak	28%		47%	
13. By comparing statements over more than one year, it appears that the school's strategy has been adjusted in reaction to its impact assessment (judgement limited by access to previous year statement on school websites)	40%	60%	31%	69%
14. The PP Statement or Policy makes specific reference to supporting Looked After Children	9%	91%	3%	97%
15. The PP Statement shows a breakdown of spending by type of activity	46%	54%	35%	65%

2. Quality of the PP Statement by Size of Allocation

	Summer 2015			Summer 2014		
	SMALL	MED	LARGE	SMALL	MED	LARGE
	lower than total findings			lower than total findings		
1. The PP Statement was easy to find	88%	98%	90%	95%	92%	90%
2. The PP Statement was published with a more detailed PP Policy	29%	28%	30%	31%	29%	22%
3. The quality of the PP Statement gives the impression that the school is taking its PP responsibilities seriously, rather than the impression of a just satisfying a 'tick box' exercise	54%	78%	90%	71%	85%	86%
4. The PP Statement or Policy refers to the involvement of Governors in decisions and monitoring	33%	38%	32%	34%	35%	22%
5. The PP Statement or Policy refers to the way the PP links with other school strategies	21%	20%	46%	29%	40%	17%
6. The PP Statement or Policy makes it clear that PP spending is targeted (not just a general budget resource)	71%	83%	83%	76%	81%	90%
7. The PP Statement or Policy makes it clear that improving literacy and maths are key priorities	67%	60%	75%	55%	73%	72%
8. The PP Statement or Policy makes specific reference to narrowing the FSM attainment gap	54%	68%	77%	53%	69%	69%
9. The PP Statement or Policy gives confidence that impact is closely monitored	54%	60%	68%	55%	71%	50%
10. The PP Statement includes <i>some</i> evaluation of impact	75%	83%	87%	76%	85%	81%
11. Where the answer to 10. is YES - the evaluation of impact is strong	17%	24%	35%	5%	15%	14%
12. Where the answer to 10. is YES - the evaluation of impact is weak	33%	36%	25%	39%	33%	41%
13. By comparing statements over more than one year, it appears that the school's strategy has been adjusted in reaction to its impact assessment (judgement limited by access to previous year statement on school websites)	29%	35%	44%	26%	40%	28%
14. The PP Statement or Policy makes specific reference to supporting Looked After Children	17%	8%	8%	8%	0%	2%
15. The PP Statement shows a breakdown of spending by type of activity	29%	38%	52%	16%	42%	36%

3. General Patterns of PP Spending

Of the 175 statements, 173 included reference to spending activities; 80 of these (46%) assigned values to specific activities; for the remainder (the majority) it was possible to identify only broad areas of types of spending, not actual proportions of spend across these activities.

The most common areas of spend identified from the 173 statements, in broad categories, are as follows:

Summer 2015

Summer 2014

	No. of Statements	% of Statements
Classroom staffing focused on interventions / 1:1 work / small group work / mentoring / booster etc *	153	88%
Classroom staffing (more general e.g. to reduce class sizes / enhanced curriculum) *	137	79%
Subsidies (school trips, uniform, food, transport)	133	77%
Catch up classes / extended activities / holiday clubs / enrichment / outdoor learning	128	74%
Pastoral / inclusion / health / behaviour / nurture support (staffing and non staffing)	111	64%
Resources and Facilities	90	52%
Parental Involvement / Home Liaison & Support	83	48%
Achievement / Attendance Initiatives and Awards	61	35%
Specific staffing for SEN or Looked After Children	19	11%
Leadership (either staffing or consultancy support)	14	8%
Specific support for new to English pupils	14	8%
Vocational subjects / apprenticeships / off site provision	10	6%
School transition / careers support	10	6%
Early Years staffing (Primary only)	9	5%
Admin costs / data management	8	5%
Sharing good practice	1	1%

	No. of Statements	% of Statements
Classroom staffing focused on interventions / 1:1 work / small group work / mentoring / booster etc *	117	86%
Classroom staffing (more general e.g. to reduce class sizes / enhanced curriculum) *	106	78%
Subsidies (school trips, uniform, food, transport)	83	61%
Catch up classes / extended activities / holiday clubs / enrichment / outdoor learning	109	80%
Pastoral / inclusion / health / behaviour / nurture support (staffing and non staffing)	78	57%
Resources and Facilities	65	48%
Parental Involvement / Home Liaison & Support	62	46%
Achievement / Attendance Initiatives and Awards	34	25%
Specific staffing for SEN or Looked After Children	13	10%
Leadership (either staffing or consultancy support)	7	5%
Specific support for new to English pupils	4	3%
Vocational subjects / apprenticeships / off site provision	8	6%
School transition / careers support	6	4%
Early Years staffing (Primary only)	6	4%
Admin costs / data management	6	4%
Sharing good practice	1	1%

Average number of areas of spend each school

5.7

4.5

4. Proportions of PP Spending

The table below shows the total proportion of spend from the 80 Statements that assigned values to specific activities (as this only uses 46% of total Statements, this analysis may be limited in its representation of District-wide patterns)

Summer 2015

Summer 2014

	Total Spend	% of Total Spend
Classroom staffing (more general e.g. to reduce class sizes / enhanced curriculum) *	4,566,371	35%
Classroom staffing focused on interventions / 1:1 work / small group work / mentoring / booster etc *	3,001,107	23%
Pastoral / inclusion / health / behaviour / nurture support (staffing and non staffing)	1,568,143	12%
Catch up classes / extended activities / holiday clubs / enrichment / outdoor learning	1,124,374	9%
Resources and Facilities	812,194	6%
Subsidies (school trips, uniform, food, transport)	587,921	5%
Parental Involvement / Home Liaison & Support	523,404	4%
Achievement / Attendance Initiatives and Awards	321,266	2%
Specific support for new to English pupils	278,080	2%
Leadership (either staffing or consultancy support)	73,715	1%
Vocational subjects / apprenticeships / off site provision	48,899	0%
Specific staffing for SEN or Looked After Children	48,585	0%
Early Years staffing (Primary only)	47,281	0%
School transition / careers support	28,623	0%
Admin costs / data management	10,100	0%
Sharing good practice	800	0%

	Total Spend	% of Total Spend
Classroom staffing (more general e.g. to reduce class sizes / enhanced curriculum) *	2,148,396	33%
Classroom staffing focused on interventions / 1:1 work / small group work / mentoring / booster etc *	1,467,310	23%
Pastoral / inclusion / health / behaviour / nurture support (staffing and non staffing)	876,439	14%
Catch up classes / extended activities / holiday clubs / enrichment / outdoor learning	349,067	5%
Resources and Facilities	437,623	7%
Subsidies (school trips, uniform, food, transport)	172,252	3%
Parental Involvement / Home Liaison & Support	301,447	5%
Achievement / Attendance Initiatives and Awards	68,435	1%
Specific support for new to English pupils	119,465	2%
Leadership (either staffing or consultancy support)	110,483	2%
Vocational subjects / apprenticeships / off site provision	245,600	4%
Specific staffing for SEN or Looked After Children	72,238	1%
Early Years staffing (Primary only)	24,268	0%
School transition / careers support	8,000	0%
Admin costs / data management	66,085	1%
Sharing good practice	800	0%

* due to the language used by schools there will be overlap between these two categories

Schools Forum Meetings Schedule & Work Programme for the 2015/16 Academic Year

Schedule of Meetings

- Wednesday 23 September 2015, 8am
- Wednesday 21 October 2015, 8am
- Wednesday 9 December 2015, 8am
- Wednesday 6 January 2016, 8am
- *Wednesday 13 January 2016, 8am PROVISIONAL MEETING*
- Wednesday 16 March 2016, 8am
- Wednesday 18 May 2016, 8am
- Wednesday 6 July 2016, 8am

Proposed Work Programme

Autumn Term

Key Dates

- Bradford District consultation on formula funding changes from April 2016
- 1 October – Schools' October Census
- 31 October – deadline for the submission of the formula pro-forma to the EFA for checking
- Early December – EFA publication of pupil numbers & other data from October Census on which 2016/17 allocations will be calculated
- December – DfE to confirm Authority 2016/17 DSG allocation
- Announcement of Pupil Premium 2016/17
- Publication of Post 16 funding modelling

Planned Business

- Consideration of the review of the behaviour support funding strategy
- Further consideration of / update on the review of support for pupils who are new to English / new arrivals
- Consideration of the recommendations on the development of the District's ASD support strategy and provision
- Consideration of the District's Early Years provisions, including the distribution of numbers across provisions and the flexibility of the early years offer in maintained settings
- Further consideration of the establishment of the Education and Commissioning Board and the allocation of the Joint Improvement Investment Fund (including impact assessment)
- Consideration of the (expected) announcements / consultation on the move to the National Funding Formula
- Further consideration of the financial position of schools and academies (responding to tighter financial times)
- Further consideration of the implementation of the Council's Living Wage proposal
- Primary, Secondary, Early Years and High Needs funding consultations & consideration of responses – agree the funding formulae from April 2016; consideration of further announcements from the DfE / EFA, including national formula and the relationships in levels of funding between phases
- Consideration of planned commissioning of places and top up arrangements relating to High Needs Block provisions 2016/17
- Discussions on how the DSG is to be allocated from April 2016, including review of items to be delegated / centrally managed (outcomes of working group deliberations)
- Consideration of DSG cost pressures in 2016/17 and strategies for supporting these
- Consideration of the Council's wider budget position 2016/17

- Report on Pupil Premium (summer 2015 survey)
- Consideration of Forum membership & changes to the Conduct of Meetings in response to the revision of the Schools Forum Regulations; Forum membership nominations & elections for 2016
- Update on 2015/16 DSG contingencies and central funds spending (view on one off monies available)
- Updates on Bradford Learning Network and the re-development of the Outdoor Education Centres
- Consideration of Post 16 funding announcements
- Update on the delivery of the Education Improvement Strategy and attainment results Summer 2015
- Update on pupil planning (expansion of provision) and the impact of Academies & Free Schools
- Update on the delivery of 2 year old places

Spring Term

Key Dates

- 21 January – Schools' January Census & Early Years Census
- 21 January – deadline for the submission of the final formula funding pro-forma to EFA, with values of the formula factors fixed
- March publication of final Post 16 allocations for 2016/17
- 28 February – deadline for publication of 2016/17 budgets for maintained schools (not including Early years Funding)
- 31 March – deadline for publication of 2016/17 EYSFF allocations
- 31 March – completion of S251 Budget Statement to DfE

Planned Business

- Final recommendations on all aspects of DSG funding for 2016/17, including school & early years budgets, high needs, contingencies and centrally managed items; Forum exercise of statutory powers
- Evaluation of the impact / anticipated impact of 2016/17 DSG recommendations
- Further consideration of the (expected) consultation on the move to the National Funding Formula
- Review of Scheme for Financing Schools 2016/17 (and directed revisions)
- Review of Schools Forum membership
- Completion of the DfE S251 Budget Statement for 2016/17
- Further consideration of the financial position of schools and academies (responding to tighter financial times)
- Update on the delivery of the Education Improvement Strategy and attainment results
- Further consideration of the establishment of the Education and Commissioning Board and the allocation of the Joint Improvement Investment Fund (including impact assessment)
- Update on pupil planning (expansion of provision) and the impact of Academies & Free Schools
- Update on the delivery of 2 year old places

Summer Term

Key Dates

- April – closedown of school accounts for the 2015/16 financial year
- 15 May – deadline for submission of Governor Approved Budgets for 2016/17 to the Local Authority
- 19 May – Schools' May Census
- Early Years DSG Block updated for January 2016 pupil numbers

Planned Business

- Consideration of Forum membership & election of the Chair / Vice Chair
- Discussion on review of key protocols (Surplus Balances, Scheme for Financing Schools, Guide to Financial Procedures, Financial Classification of Schools, LTFM)
- Update on Academies & Free Schools
- Update on compliance with the SFVS
- Review of 2016/17 funding arrangements and consideration of DSG & formula funding changes from April 2017 (national funding formula)
- Review of school balances held at 31 March 2016 and Surplus Balances Protocol
- Update on the delivery of the Education Improvement Strategy and attainment results
- Further consideration of the establishment of the Education and Commissioning Board and the allocation of the Joint Improvement Investment Fund (including impact assessment)
- Update on pupil planning (expansion of provision) and the impact of Academies & Free Schools
- Update on the delivery of 2 year old places