

## MINUTES OF THE MEETING OF THE SCHOOLS FORUM HELD ON WEDNESDAY 21 OCTOBER 2015 AT CITY HALL, BRADFORD

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Commenced 0803  
 Adjourned 0955  
 Reconvened 1010  
 Concluded 1128

### PRESENT

#### School Members

Bev George, Brent Fitzpatrick, Chris Quinn, Dianne Rowbotham, Dominic Wall, Emma Ockerby, Kevin Holland, Michele Robinson, Nicky Kilvington, Maureen Cairns, Ray Tate, Sami Harzallah, Sue Haithwaite and Trevor Loft

#### Nominated Sub School Members

Ian Morrel and Irene Docherty

#### Non School Members

Ian Murch and Donna Willoughby

#### Local Authority Officers

Andrew Redding	Business Advisor (Schools)
Dawn Haigh	Principal Finance Officer (Schools)
Judith Kirk	Interim Assistant Director, Education and School Improvement
Michael Jameson	Strategic Director, Children's Services
Raj Singh	Business Advisor
Sarah North	Principal Finance Officer (Schools)
Stuart McKinnon-Evans	Director of Finance

#### Observers

Councillor Hinchcliffe	Portfolio Holder, Education, Skills and Culture
Councillor Sykes	Children's Services Overview and Scrutiny Committee, Chair
Lynn Murphy	Business Manager, Feversham College
Nav Chohan	ShIPLEY College ( <i>Observer for David Harwood</i> )
Sarah Murray	Bradford College Education Trust ( <i>Observe for Dwayne Saxton</i> )
Tom Bright	The Association of Teachers and Lecturers (ATL) representative

#### Apologies

David Harwood, Dwayne Saxton, Gareth Dawkins, Nigel Cooper, Phil Travis and Vivienne Robinson

### DOMINIC WALL IN THE CHAIR

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## 97. NEW CHAIR'S OPENING REMARKS

Dominic Wall introduced himself as the newly elected Chair of the Schools Forum. With Paul Burluraux, the previous Chair, attending the Forum for the final time, Dominic thanked Paul, on behalf of all Members and officers, for his outstanding contribution to the work of the Schools Forum as a long standing member and as Chair and also for his commitment to Bradford since 1983. Paul thanked Dominic and members for their appreciation and kind words, in return thanking all current and former Forum members, and officers, for their dedication and hard work in putting the interests of the children of Bradford first and in seeking to drive forward change and improvements. Following a round of applause, Paul left the meeting.

The Chair continued by reporting membership changes since the last meeting. It was reported that:

- Shanaz Anwar-Bleem (academy representative) has resigned and a replacement will be sought via the academies convener.
- Michael Walsh (the representative of Post 16 High Needs Providers) has also resigned and has been replaced, following election, by David Harwood, the Principal of Bradford College. As David is not able to attend this meeting, the Principal of Shipley College is in attendance as a substitute.

## 98. DISCLOSURES OF INTEREST

A declaration was received from the Chair for agenda item 9 "New to English Support Strategy (Additional Information)", minute 103.

**ACTION:** *City Solicitor*

## 99. MINUTES OF 23 SEPTEMBER 2015 AND MATTERS ARISING

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

- **Schools Forum Members – Election of a Chair (item 87. Page 60):** This has been actioned as agreed. Dominic Wall is elected Chair.
- **Update on 2015/16 DSG Funding Matters (item 88. Page 62):** It was reported that an update, responding to the Forum's requests for further information on the establishment of the hubs and the Council's strategic approach, is provided under agenda item 7 and that the minutes of the BEICB meeting are provided under agenda item 6
- **Early Projection of the 2016/17 DSG Position and Cost Pressures (item 89. Page 64):** It was reported that the risk analysis and information on funding multiple needs, requested at the last meeting, is provided in the FFWG report under agenda item 14.
- **Consultation on the Early Years Single Funding Formula (item 90. Page 64):** It was reported that the consultation document was published and outcomes are being reported to this meeting under agenda item 11. In terms of the request for

further information on the vetting processes for take up of the 2 year old offer, it was reported that:

- The responsibility for checking eligibility for the 2 year old offer rests with settings. Guidance and support is provided by Sufficiency Officers.
  - Some authorities carry out their own checking (rather than asking settings to do this). We believe that these authorities have comparably much lower numbers than us. A consideration is the time (as well as the capacity) that would be needed for the Authority to vet all children and the delays this may cause to confirming funding allocations. This being said, our Early Years team undertook audits in summer 2014, from which 3 children in total were identified to have been funded when not eligible.
  - Concerns raised by Sufficiency Officer are referred to Internal Audit and, in some case, the Council's Fraud Investigation Unit.
  - The Authority agrees that some form of vetting does need to continue, alongside guidance and pro-active support. We do not expect this to mean that the Council will check the eligibility of all 2 year olds. It is anticipated that the quite significant streamlining of finance processes relating to the 2 and 3 / 4 year old offers, which is currently taking place, will free up capacity to enable the Council to continue to carry out audits
  - In wider context, the robustness of data is an issue that we also face with Census information for primary and secondary schools. Simply put, the Council never has had the capacity to audit all the data that comes from schools. However, we do carry out spot checks and sampling, in particular, where anomalies are identified.
  - This is an issue that we will come across with the extension of the entitlement to 30 hours (where some vetting of the work status of the parents will need to take place). Clearly then, the Authority will need to think about further.
- **Consultation on the primary and secondary school formulae 2016/17 (item 91. Page 65):** It was reported that the consultation document, amended as agreed, was published and outcomes are being reported to this meeting under agenda item 10.
  - **Pupil Premium Spending Analysis (item 92. Page 66):** the action points from this agenda item will be taken forward. The Pupil Premium survey has been presented to the Children's Services Scrutiny Committee and this Committee has asked that the Schools Forum draws to the attention of headteachers and governors the low number of schools (9% of statements) that make reference in their Pupil Premium Statements to the use of Pupil Premium to raise the achievement of looked after children. We ask Members to consider this and to take this back to colleagues.
  - **Work Programme (item 93. Page 66):** the work programme has been amended and published as agreed. As indicated at the last meeting, the DfE's Area Reviews are now beginning and the District is also beginning to review our Post 16 provisions. We still await announcements about Post 16 funding levels for 2016/17. From a financial perspective however, a number of secondary schools have seen reductions in their Post 16 numbers this September, which has consequences for their overall budget pressures.

#### **The Business Advisor (Schools) reported on other Matters Arising:**

- **Update on the Bradford Learning Network:** regular updates have been provided previously to the Forum on the number of schools and academies buying into the BLN. A matters arising document provides details of the buy in for the BLN 3

contract. As the statement shows, the vast majority of schools and academies (and therefore, pupils) access the BLN3 services. This is tabled for information.

- **Implementation of a Living Wage:** as discussed previously (latest in July), and as referred to at the September Forum meeting, the Council is about to write out to schools about the implementation of a living wage. Included in the meeting papers is the draft of the letter, and supporting guidance, to be sent to maintained community and voluntary controlled schools. Letters to other types of setting will be sent out based on this. This is tabled for information.
- **Report to the Scrutiny Committee:** a report is being presented to the Scrutiny Committee tomorrow evening, providing an updated view on the relationships between funding and attainment. This has been provided for the Forum's awareness. Members, in particular, should consider the key messages from the outline conclusions presented in paragraph 1.3 of the report. Members will also be interested in the appendix to the report, which shows the value for money framework used by the DfE to assess the value for money of the academies / free school programme, There are a number of things we can learn from this framework in the development of our framework for evaluating the impact and success of funding strategies.
- **Unplaced children at the October Census:** In previous years we have reported to the Forum the number of children that were 'in the system' but had not been allocated a place in a primary or secondary school before the October Census was taken. We do not receive DSG funding for the children that are not placed by this time. This has been presented for the Forum's information, but also as Members have expressed a desire to improve this position and to consider 'spend to save' strategies that could be employed. Members are reminded that, to this end, there is a sum of £151,000 available within the DSG admissions budget that is still available to use. The figures unplaced, in the context of the total number of applications, this year and in the last few years are:
  - October 2012: 169 out of 1,278 (13%)
  - October 2013 277 out of 1,500 (18%)
  - October 2014 90 out of 1,370 (7%)
  - October 2015 143 out of 1,499 (10%)

Of the 143 not allocated a place by October 2015, 45 were primary-aged and 98 were secondary-aged.

#### **Resolved –**

- (1) **That progress made on “Action” items and Matters Arising be noted.**
- (2) **That the minutes of the meeting held on 23 September 2015 be signed as a correct record subject to Trevor Loft (School Member) and Michael Jameson (Strategic Director, Children's Services) be recorded as attended.**

**ACTION: Assistant City Solicitor**

**100. MATTERS RAISED BY SCHOOLS**

There were no matters raised by schools to report.

**No resolution was passed on this item.**

**101. STANDING ITEM – DSG GROWTH FUND ALLOCATIONS**

No new allocations were presented.

**No resolution was passed on this item.**

**102. STANDING ITEM – BRADFORD EDUCATION IMPROVEMENT COMMISSIONING BOARD (BEICB)**

In introducing this item, the Chair reminded Members that a report, which includes the minutes of BEICB meetings, is now a standing agenda item. The Business Advisor (Schools) then presented the minutes of BEICB, focusing on section 7 (action items).

Forum members asked the following questions and made the following comments:

- What opportunity do Forum members have to ask specific questions, and receive responses, about the work / decisions of the BEICB? The Business Advisor (Schools) responded with the suggestion that, similar to Council questions submitted by Elected Members, Forum members could submit written questions by email to him for written responses to be provided within the next standing report to the Forum. Members agreed this approach.
- Is the BEICB's allocation for the NQTs funding new activity? Have we seen a significant increase in the number of NQTs in the District this year, and is the NQT programme in reaction to this? It was agreed that a response to these questions would be provided in the next BEICB report.
- A member of the Schools Forum and previously of the Education Improvement Strategic Board (EISB) asked for clarification on the status of this Board, and expressed dissatisfaction with the lack of clear communication from the Council on this. The Strategic Director, Children's Services, clarified that the EISB is still in place and that he would talk to the Member outside this meeting.
- Who would be the School Forum's representative on the BEICB following the retirement of the previous Chair? The Vice Chair put herself forward to represent the Forum, but it was agreed that an email asking for nominations would be sent out to give all Members the opportunity to put themselves forward.

**Resolved –**

- (1) **That where Forum members have specific questions about the work of the BEICB, that these questions be submitted by email to [andrew.redding@bradford.gov.uk](mailto:andrew.redding@bradford.gov.uk). Written responses will be presented back to the Forum within the BEICB standing agenda item at the next available meeting. The next opportunity to report back will be on the 9 December 2015.**
- (2) **That further information be provided on the New Qualified Teachers strategy as recorded in the minutes of the BEICB's 14 September 2015 meeting.**

- (3) That an email be sent to all members to inform them that Dianne Rowbotham (Vice Chair) had put herself forward to be the School Forum's representative on the BEICB (following the retirement of the Forum's previous Chair) and to ask for any further nominations. If no further nominations are received, Dianne is to be the Forum's representative. If further nominations are received, the representative will be decided by election (by email).

**Action:** *Business Advisor (Schools)*

### 103. NEW TO ENGLISH SUPPORT STRATEGY (ADDITIONAL INFORMATION)

The Lead Area Achievement Officer and the Co-ordinator New Communities/Travellers presented verbally an update on the development of new to English centres of excellence (hubs) and also responding to the questions that Forum members asked at the last meeting (recorded in the minutes).

Regarding the development of the hubs, it was reported that:

- 9 schools so far have expressed an interest in developing hubs (the Authority is initially seeking to establish 6).
- The Authority's on-going role will be to monitor the progress and performance of the hubs. It is anticipated that performance reports would be provided on a regular basis to the BEICB, with the first report at the end of the 2015/16 academic year.
- The host schools will be required to 'put in' their infrastructures, systems and specialist support services, including the provision of advice to other schools (attendance improvement and monitoring, data management and pupil performance tracking, parental involvement, support for teaching and learning, behavioural and cultural advice, preparation for Ofsted).
- The £20,000 initial allocation is for pump-priming purposes only and any future finance would need to be considered by the BEICB. It is expected that the hubs will become self-sustaining.
- The Authority is exploring a further application for funding to the Education Endowment Fund.
- Bradford College has been contacted (as agreed at the last meeting).

Forum members asked the following questions and made the following comments:

- Children attending the hubs will progress at different rates and have different needs, which will make performance evaluation difficult. The Lead Achievement Officer responded that the Authority is aware of this and is currently talking with the data analysis team.
- A member expressed the view that the redirection of support services for new to English to schools from the Authority is a bold step (more than half of local authorities continue to provide centrally managed support). Critical then is the evaluation of impact and success and these needs to take a form more significant than an annual report to the BEICB. Of concern is whether a school-led system will be able to deal with the complexity of need.
- A member expressed a concern about the assumption that the hubs will be self-sustaining and asked that this aspect is specifically considered further; previous models that have relied on the trading of services between schools have not been successful because they have not become self-sustaining.
- A member emphasised that education support services need to be better joined

with social care and health and the Authority needs to progress discussions further with agencies about how health and social care can be better engaged in provision for children in Bradford schools.

The Co-ordinator New Communities/Travellers spoke to the Forum in response to the questions asked at the last meeting regarding processes for managing the arrival of refugees in Bradford. He reported that:

- 28 refugees from Syria were placed in Bradford schools and colleges in the 2014/15 academic year. To date 12 have been placed during this academic year, with an estimated further 18. Given these low numbers, it is not expected that these will have any significant impact on standards in schools. The Co-ordinator added that, having spoken to the schools that have admitted children from refugee children, these schools speak very positively about these children. Many of these children are making very good progress.
- There is a Home Office sponsored housing provider in Bradford, who liaises with the Authority's admissions team to ensure that refugee families are not placed in areas of the District where there are not available school places. Parents do have the right to express a preference, and some do where families have links with relatives or families already living in Bradford.
- The placement of children from refugee families is discussed with individual schools within the admissions and Fair Access meetings.

In summing up this item, the Chair thanked the Lead Area Achievement Officer and the Co-ordinator New Communities/Travellers for their comprehensive response to the questions and concerns raised by the Forum at the last meeting. The Authority must continue to ensure that communication with schools around admissions and planning takes place as early as possible.

#### **Resolved –**

- (1) That the information provided be noted and that a further update be received on 9 December 2015.**
- (2) That further consideration be given to how the new to English hubs will be self-sustaining and how education, health and social care services can be joined.**

#### **104. EDUCATION PERFORMANCE 2015**

A report was presented, **Document FF**, which outlined the key education attainment results from summer 2015. It was explained that this information is presented to support Members' view of key funding priorities.

The Interim Assistant Director - Education and School Improvement and Head of Service for School Improvement were both present and gave a joint synopsis of the report. It was explained that there have been some further statistical releases since the paper was written; we now have full results for the EYFSP, year 1 phonics and key stage 1 results. The remaining results are still to be validated and it was explained that we would expect some small changes in the final results.

Forum Members asked the following questions and made the following comments:

- Do we understand the reasons behind the apparent divergence in performance between secondary schools at Key Stage 4? It was explained that the type of courses being delivered was one reason alongside other individual-school level factors.
- That we need to be better at celebrating success.
- Are we holding schools to account in their use of resources?

The Chair observed that the results in Early Years would seem to evidence some impact of our investment of DSG formula funding in this phase. However, it is difficult to be clear on cause and effect here. How do we know what part funding has played in the improvement on GLD scores, as opposed to other factors? Referring to Ofsted's letter to the Authority following the inspection of Bradford Council's school improvement function early this year, the Chair asked that officer work quickly to develop a framework through which the specific impact of funding can be evaluated. It will be important to have this framework in place especially as we consider how to reduce spending or redistribute funding in the future.

### **Resolved –**

- (1) That the information provided be noted.**
- (2) That the Authority develops a framework for the evaluation of the impact of financial decision making (as referred to in Ofsted's inspection report on the Council's school improvement function) and presents this for the School Forum's consideration at the earliest opportunity.**

**Action:**      *Business Advisor (Schools)*

## **105. THE LOCAL AUTHORITY'S FINANCIAL POSITION AND BUDGET PROPOSALS**

The Director of Finance and the Strategic Director, Children's Services presented verbally an outline of the key aspects of the Local Authority's financial position for 2016/17, explaining that this information is given in advance of fuller discussion on the Council's budget proposals for 2016/17, which is planned for the next Forum meeting.

The Director of Finance began by explaining that the assessment of the Council's funding gap, based on current estimates (with a number of uncertainties, including the impact of the introduction of the national living wage on the Council's supply chain, regional devolution and the Chancellor's Spending Review on 25 November), is £60m over 2016-18 (£20m in 2016/17 and £40m in 2017/18). The Council is therefore, by necessity, continuing to reduce its expenditure. Members will be aware of the 'New Deal' conversations that have taken place across the District. The budget proposals for 2016/17, which will be published on 23 November for consultation, will be wide ranging. The Director explained that there are a number of tensions and balances to consider in developing proposals, especially in reducing the financing of preventative services (for example, in social care, which constitutes approximately 50% of the Council's spending excluding schools), the continued requirement to meet statutory responsibilities and continuing to deliver on (or manage) people's expectations of what the Council will deliver. The Director explained that there is also a tension between the time pressure on the achievement of savings and the difficult and complex nature of savings projects, such as



the review of Children's Centres and changes to the school transport policy. It is useful for the Schools Forum to be aware that more of these types of projects will be necessary to achieve sufficient savings, but that these projects will be complex to administer and difficult to implement.

The Strategic Director, Children's Services, presented verbally the financial pressures, and themes and priorities, in Children's Services. He explained that Children's Services is the 2<sup>nd</sup> largest Council budget, at £72m, with this budget having been reduced by £14m this financial year. A notional 'salami slice' approach to savings would mean a further reduction of £12m in 2016/17. This salami slicing approach is not being proposed, but the £12m does illustrate the extent of the financial challenge facing the Council and Children's Services. There will need to be whole-system change, based on an absolute clarity on outcomes. The Director further outlined his thoughts on the key building blocks / themes behind the reviews of services; social care and safeguarding, including a whole system review of pro-active early help, disability services and transitions; opportunities in social care and health around regional devolution; children in care, including children's homes and foster carers; post 16 provision, responding to the significant reductions in funding in this area; education outcomes, including the progression of the sector-led improvement system; employment and skills. The Director explained that he would bring further proposals to the Schools Forum in these areas to the December meeting. He also added that the DSG allocation to the Bradford Education Commissioning Board (the co-commissioning fund) is vitally important in facilitating successful system change.

Following these presentations, Forum Members asked the following questions and made the following comments:

- The Chair stated that safeguards will need to be built into change processes. Such a degree of structural change will require a significant behavioural shift. The Council must engage as early as possible with schools and other stakeholders, so that change is developed and managed in partnership with a clarity of understanding of the direction of travel and impact.
- Is 2016/17 the final year of austerity reductions? The Director of Finance responded that 2016/17 is not the final year; reductions do not finish until 2020, with further reductions in the region of £20-30m in each of 2018/19 and 2019/20.
- Will the devolution of business rates income negatively affect Bradford? The Director of Finance explained that we do not yet know enough about what is being proposed by Government to assess the impact. The impact (in 2020) will depend, in particular, on the distribution mechanism, what new responsibilities local authorities will take on and the regional devolution agreement. There are a range of different positions across metropolitan districts.
- The Vice Chair stated that a real issue facing schools is the quality of parental support of children, especially aged 0-3. How services for family / parental support develop (or are affected by reductions) will be critical in raising educational outcomes, with some concern that funding reductions will reduce activity in this area. This is perhaps an issue for the Commissioning Board to consider. The representative of Nursery schools explained that Children's Centres are continuing to work hard to deliver support for parents and families but that funding cuts are biting hard.

#### **Resolved –**

- (1) That the information provided be noted.**
- (2) That further detailed information be provided to the 9 December 2015 meeting**

**on the Council's budget proposals for Children's Services for 2016/17.**

**Action:**     **Director of Finance**  
                   **Strategic Director, Children's Services**  
                   **Business Advisor (Schools)**

**106. CONSULTATION OUTCOMES – PRIMARY AND SECONDARY FORMULAE**

The Principal Finance Officer (Schools) presented a report, **Document FG**, which asked Members to consider the outcomes of the consultation on the 2016/17 Primary & Secondary funding formulae and to make final recommendations on the structure of these formulae (the "pro-forma"), which is to be submitted to the Education Funding Agency. The responses received to the consultation were reported verbally.

Concerns were raised regarding the low response rate and Members questioned how the two-way communication between schools / academies and the Schools Forum could be improved. Members agreed that effective communication is especially important as budgets become tighter and as significant changes in the funding system are expected to be introduced. The Business Advisor (Schools) explained the main ways the Local Authority communicates with schools, academies and other providers, and also explained that a termly Schools Forum newsletter is being planned. In getting key messages to schools and collecting feedback however, he stated the Local Authority needs the help of Forum Members and of other stakeholders in the system, including the partnerships. The Vice Chair suggested that Schools Forum business could be a regular agenda item at BPIP Board meetings. It was also suggested that the Primary Area Leads could be used to disseminate messages and collect feedback. Communication is also something that the new Commissioning Board could consider. In summarising the Forum's discussion, the Chair stated that he would consider how he as Chair can improve communication and that the Forum must discuss this matter further. He asked that a paper be provided to the next meeting to aid this.

**Resolved –**

- (1) That the Primary and Secondary Pro-forma (shown in Appendix 1) for the 2016/17 financial year be submitted to the Education Funding Agency (EFA) by 30 October 2015. Agreed by vote on a phase-specific basis.**
- (2) That the continuation in the 2016/17 financial year of the criteria for the allocation of the DSG's Schools Block Primary and Secondary Growth and other contingency funds Primary, as proposed in the consultation document, be agreed. Agreed by vote on a phase-specific basis.**
- (3) That the negative consultation feedback received from one school on the values of funding of additional educational needs in Bradford's formulae be considered by the Formula Funding Working Group at its next meeting.**
- (4) That in the absence of a specific provision for this with the Finance Regulations, that a solution be developed to manage how the votes of academy members can be treated where voting must take place on a phase-specific basis.**
- (5) That where the level of response in future consultation exercises is low, that**

**an email reminder be sent to the Chairs of the Partnerships informing them of this and confirming the proposed action to be taken.**

- (6) **That, referring also to other matters discussed during the meeting, that a paper be provided for the 9 December 2015 meeting, which outlines the measures by which communication and feedback between the Schools Forum and the partnerships and schools can be improved.**

**Action:** *School Formula Funding Officer*

#### 107. **CONSULTATION OUTCOMES – EARLY YEARS SINGLE FUNDING FORMULA**

The Principal Finance Officer (Schools) presented a report, **Document FH**, which asked Members to consider the outcomes of the consultation on the Early Years Single Funding Formula and to make final recommendations on the structure of this Formula for 2016/17. It was confirmed verbally that no formal written responses have been received to the consultation.

The report also provided further information on places planning and on the development of flexibility in the maintained sector, responding to the previous request of Members for further information. The signposting of sources of support and guidance was welcomed by Members. A Member asked for clarification on how maintained providers delivering the 2 year old offer can access DSG resources for 2 year old children with SEND.

**Resolved –**

- (1) **That the structure of the Early Years Single Funding Formula for the 2016/17 financial year, as proposed in the consultation document, be agreed. Agreed unanimously by vote by Primary and Early Years members.**
- (2) **That clarification be provided on the ability of maintained schools to access the DSG's SEND budgets for children in their 2 year old provisions.**

**Action:** *Principal Finance Officer (Schools)*

#### 108. **CONSULTATION – HIGH NEEDS BLOCK 2016/17**

The Business Advisor (Schools) presented a report, **Document FI**, which asked Members to agree the publication of the proposed consultation document on the High Needs Block funding model for 2016/17. It was explained that this document includes the number of places the Authority plans to commission and the arrangements for paying top up (Plus) funding. Members were also asked to begin to consider the issues the report raises regarding on-going affordability pressures within the High Needs Block.

Members asked the following questions and made the following comments:

- Whether the £3m-£3.5m indicative affordability gap in 2016/17 takes account of current spending positions (and whether this gap is reduced when current spending patterns are factored in). It was explained that the High Needs Block is currently forecasted to be fully spent in this financial year and therefore, there is no expectation that either on-going or one off savings will be available to reduce the

affordability gap next year. The Business Advisor stated that a detailed breakdown of the 2015/16 DSG spending forecast will be presented to the Forum at the next meeting.

- That it would be useful for the Forum to be provided with data, which shows the extent to which children move up the ranges funding model as they progress through primary to secondary provision, including those that may progress to be funded through an independent or out of authority provision.
- That the SEN Reference Group has identified, and is beginning to consider further, what benchmarking data highlights about how the number of specialist places provided in the Bradford District differs from the numbers in other authorities. This data will be presented in summary to the Schools Forum and the next meeting and that this will likely provide context to considerations around the 2016/17 DSG allocation and affordability pressures. The Vice Chair welcomed discussion on this data taking place in the full Schools Forum. Following the Chair's suggestion, the Business Advisor explained that it may be useful for a single item agenda / education select committee style Forum meeting to be arranged in the new year, specifically to consider evidence and comparative data concerning the District's SEND places provision, how the District's places sufficiency strategy could develop and how this may be affected by developments nationally e.g. a national funding formula.
- That there are a number of issues previously raised with the Forum that are outstanding to be concluded or resolved, including the development of the District's strategy and provision for behaviour support and for ASD need. The Vice Chair specifically made a plea for the review on primary aged behaviour support to now be quickly progressed.
- The Principal of Shipley College (attending as a substitute representative of Post 16 high needs providers) specifically requested that the current issue regarding the sufficiency of places funding for Further Education settings be addressed as a matter of urgency.

#### **Resolved –**

- (1) That the publication of the proposed consultation on the High Needs Block funding model for the 2016/17 financial year be agreed.**
- (2) That a more detailed report be presented to the Schools Forum on 9 December 2015 on the high needs funding matters highlighted at this meeting.**
- (3) That information be provided, which shows the extent to which children move up the ranges funding model as they progress through primary to secondary provision, including those that may progress to be funded through an independent or out of authority provision.**
- (4) That the Authority resolves the issue of the gap between places funding and actual occupancy in Further Education settings as a priority, with a recommendation to be considered by the Schools Forum on 9 December 2015.**

**Action:**        *Business Advisor (Schools)*

## 109. **DSG SCHOOLS AND EARLY YEARS CENTRAL ITEMS AND DE-DELEGATED FUNDS 2016/17**

The Business Advisor (Schools) presented a report, **Document FJ**, which asked the Forum to consider the position of Schools and Early Years Block central and de-delegated items to be funded from the DSG in 2016/17. It was explained that the information in this report, especially Appendix 1, is presented to continue the discussion on the future direction of these funds and it is anticipated that Members will wish to further consider this across the December and January meetings. In particular then, Forum Members are asked to consider what further information is needed / review work should take place in order for final recommendations for 2016/17 to be made.

The Business Advisor suggested that the 4 funds that will be of most interest to Forum Members will be Admissions, the DSG's Matched Contribution to School Improvement, ESBD Support Team and the Ethnic Minority Support Team. It was reported that updated benchmarking (Appendix 2) indicates that, following the changes made this year, our spending on trade union facilities time has come more in line with other authorities.

The Business Advisor explained that the Local Authority recommends that a detailed discussion on the direction of travel of these funds, in particular, of the DSG's contribution to schools improvement, takes place at the next BEICB meeting to be held on the 12 November, with the members of the Forum's De-Delegated and Centrally Managed Services Working Group involved in this discussion. This feels to be a good way of joining together the scrutiny and views of both the Schools Forum and the BEICB. On this basis, recommendations from this meeting can be presented back to the Schools Forum in December for consideration. It is the Schools Forum that will make final recommendations to the Council's Executive.

Members asked the following questions and made the following comments:

- Who are the Members on the Forum's De-Delegated Funds Working Group? The current membership was given (Dianne Rowbotham, Chris Quinn, Dwayne Saxton, Ian Morrell and Bev George).
- What response has been received to the consultation on de-delegated items? As reported in item 106, it was explained that very little feedback of the view of maintained schools on de-delegation has come from the consultation exercise.

In summing up this item, the Chair emphasised the importance of effective collaboration and recognition of collective responsibility between schools and the Local Authority, especially in sustaining specialist services and expertise (staff).

### **Resolved –**

- (1) **That the contents of Document FJ be noted.**
- (2) **That the members of the Forum's Working Group meet with the Bradford Education Improvement Commissioning Board (on 12 November 2015) to consider the position and the future direction of the DSG's centrally managed funds, for recommendations to be presented to the Schools Forum on 9 December 2015.**

**Action:** *Business Advisor (Schools)*

## 110. **FORMULA FUNDING WORKING GROUP REPORT**

The Principal Finance Officer (Schools) presented a report, **Document FK**, which provided initial feedback on the discussions within the Formula Funding Working Group (FFWG) on matters relating to the values of factors within the primary and secondary funding formulae and on the matters raised in the September Forum meeting, which were recorded in the minutes of that meeting.

Following a summary of the report, the Business Advisor (Schools) asked Members to focus on the final column in Appendix 1, which shows the higher level of funding we currently allocate to primary and secondary schools for children with multiple needs. It was explained that this higher rate of funding follows the nature of our provision, but is clearly an area of risk as a national funding formula may not replicate this. Another area of risk is the funding of smaller schools, as the national average lump sum value is much lower than our current £175,000 and we are aware that ministers have previously expressed a desire to move away from lump sum funding (except in supporting sparsity). The Director of Finance reminded Members that significant changes are likely to be implemented under transitional protection, so there is no need to panic at this stage. However, the Authority will need the help of Forum Members in communicating key messages about the national funding formula when more is announced by the DfE.

A member representing primary maintained school headteachers reminded the Forum that the funding difference between primary and secondary is still considerable. Concern was also expressed around the implications of future funding reductions for the capacity of outstanding schools (including outstanding smaller schools) to support others.

The Forum noted that a further meeting of the FFWG is planned to take place this term in order to inform the Forum further before recommendations on the 2016/17 DSG allocation are made.

**Resolved –**

**That the contents of Document FK be noted.**

## 111. **SCHOOLS FORUM ADMINISTRATION 2015/16 ACADEMIC YEAR**

The Business Advisor (Schools) presented a report, **Document FL**, which asked Members to review the Forum's administrative and membership arrangements for 2015/16. It was also confirmed that the current academy membership convener will be contacted to replace the membership now vacant from the resignation of Shanaz Anwar-Bleem.

**Resolved –**

- (1) **That the Schools Forum's Conduct of Meetings & Procedural Matters document be agreed.**
- (2) **That the proposal to transfer one secondary maintained Headteacher membership to an academy membership be agreed.**

**Action: *Business Advisor (Schools)***

**112. OUTDOOR EDUCATION CENTRES**

**The consideration of this item was deferred to the Schools Forum of 9 December 2015.**

**113. SCHOOLS FORUM STANDING ITEMS**

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

**No resolution was passed on this item.**

**114. ANY OTHER BUSINESS (AOB) / FUTURE AGENDA ITEMS**

**No resolution was passed on this item.**

**115. DATE OF NEXT MEETING**

**The next meeting of the Schools Forum is Wednesday 9 December 2015.**

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

minutes\SF21Oct

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



Education  
Funding  
Agency

# **Funding for school admission appeals**

**Government consultation**

**Launch date 5 November 2015**

**Respond by 3 December 2015**



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## Introduction

The Department for Education is seeking views on the proposed change to section 6.2 of the [Scheme for financing schools](#) guidance, as part of its arrangements for local authorities. Local authorities are required to publish schemes for financing schools setting out the financial relationship between them and the schools they maintain. The Scheme for financing schools guidance lists the provisions which a local authority's scheme must, should or may include. Section 6.2 of this guidance lists the main circumstances in which a local authority can charge school budgets for agreed services and concerns maintained schools only. This consultation relates to proposals to extend this list to provide additional flexibility for funding admission appeals

## Who this is for

- Chief finance officers and finance officers at local authorities
- Governors
- Chairs and clerks of schools forums
- Diocesan representatives
- Other interested parties

## Issue date

The consultation was issued on 5 November 2015.

## Enquiries

If your enquiry is related to the policy content of the consultation you can contact the team at:

[fundingadmissionappeals.consultation@education.gsi.gov.uk](mailto:fundingadmissionappeals.consultation@education.gsi.gov.uk)

If your enquiry is related to the DfE e-consultation website or the consultation process in general, you can contact the DfE Ministerial and Public Communications Division by email: [consultation.unit@education.gsi.gov.uk](mailto:consultation.unit@education.gsi.gov.uk) or by telephone: 0370 000 2288 or via the [DfE Contact us page](#).

## Additional copies

Additional copies are available electronically and can be downloaded from [GOV.UK DfE consultations](#).

## The response

The results of the consultation and the Department's response will be [published on GOV.UK](#) in winter 2015.

# About this consultation

## Summary

The Department is proposing to make a change to section 6.2 of the Scheme for financing schools guidance, to include admission appeals as one of the services in which a local authority can charge school budgets for agreed services. The change provides additional local flexibility.

## Context

Paragraph 1.14 of the School Admission Appeals Code states that: *“Local authorities must allocate reasonable funds to governing bodies of maintained schools which are admission authorities to meet admission appeals costs.”*

Therefore, local authorities currently have a duty to support maintained schools (Voluntary Aided, Foundation and Trust schools) which are admission authorities. This is in addition to authorities’ responsibilities where they act as the admissions authority for maintained Community and Voluntary Controlled schools.

However, the 2013 to 2014 funding reforms removed the ability of local authorities to specifically allocate funding for own admissions authority schools and ended the separate grant paid to academies for admissions. The reforms also restricted local authorities’ ability to increase the amount of budget retained centrally for admissions, to ensure that as much money as possible was allocated to schools.

## Proposed changes

For schools for which the local authority is the admission authority, and for which the authority therefore must provide an appeals service, the additional flexibility the Scheme for financing schools will allow local authorities to use their powers under the Financial Management Scheme to charge those schools. All other schools and academies would be responsible for their own admission appeals, with funding for this function included in their delegated budgets. No separate funding will be available to help cover the costs of providing this service. The local authority could offer a traded service, which schools and academies which are their own admissions authorities would be free to decide whether to use individually.

If a local authority wished to make use of this additional flexibility, a change to the local scheme would be needed. Local authorities must consult all schools in their area and receive the approval of the members of their schools forum representing maintained schools. Should they wish to do so, local authorities will be able to use this approach to admission appeal arrangements for 2016-17. Schools would be protected, as an

authority cannot act unreasonably in the exercise of any power given by the scheme, or it may be the subject of a direction under s.496 of the Education Act 1996. Furthermore, for each of the circumstances in which an authority can charge a school, the authority has to be able to demonstrate that the authority had necessarily incurred the expenditure now charged to the budget share.

The existing option whereby a local authority, in agreement with its schools forum, can retain funding centrally to cover admission appeals for all types of schools and academies remains, should a local authority and its school forum desire and agree to use this approach.

If agreed, the operational guide for schools will also be updated to reflect this change.

We would like to hear your views on our proposals.

## **How to respond**

### **Respond online**

To help us analyse the responses please use the online system wherever possible. Visit [www.education.gov.uk/consultations](http://www.education.gov.uk/consultations) to submit your response.

### **Other ways to respond**

If for exceptional reasons, you are unable to use the online system, for example because you use specialist accessibility software that is not compatible with the system, you may download a word document version of the form and email it or post it.

#### **By email**

[fundingadmissionappeals.consultation@education.gsi.gov.uk](mailto:fundingadmissionappeals.consultation@education.gsi.gov.uk)

#### **By post**

AMSG: Funding Division  
Level 4  
Department for Education  
Great Smith Street  
London  
SW1P 3BT

## **Deadline**

The consultation closes on 3 December 2015.

# The charging of school budget shares

## Background

Section 6 of any Financial Management Scheme should contain a provision which allows the budget share of a school to be charged by the authority without the consent of the governing body **only** in circumstances expressly permitted by the scheme. It requires authorities to consult schools as to the intention to charge, and notify schools when it has been done.

The following has been extracted from section 6 of the current '*Scheme for financing schools*'.

## Circumstances in which charges may be made

- 6.2.1 Where premature retirement costs have been incurred without the prior written agreement of the authority to bear such costs (the amount chargeable being only the excess over any amount agreed by the authority);
- 6.2.2 Other expenditure incurred to secure resignations where the school had not followed authority advice;
- 6.2.3 Awards by courts and industrial tribunals against the authority, or out of court settlements, arising from action or inaction by the governing body contrary to the authority's advice

Awards may sometimes be against the governing body directly and would fall to be met from the budget share. Where the authority is joined with the governing body in the action and has expenditure as a result of the governing body not taking authority advice, the charging of the budget share with the authority expenditure protects the authority's position.

Authorities should ensure in framing any such advice that they have taken proper account of the role of aided school governing bodies.

- 6.2.4 Expenditure by the authority in carrying out health and safety work or capital expenditure for which the authority is liable where funds have been delegated to the governing body for such work, but the governing body has failed to carry out the required work;
- 6.2.5 Expenditure by the authority incurred in making good defects in building work funded by capital spending from budget shares, where the premises are owned by the authority or the school has voluntary controlled status;
- 6.2.6 Expenditure incurred by the authority in insuring its own interests in a school where funding has been delegated but the school has failed to demonstrate that

it has arranged cover at least as good as that which would be arranged by the authority;

See also 10.1. The authority itself needs to consider whether it has an insurable interest in any particular case.

6.2.7 Recovery of monies due from a school for services provided to the school, where a dispute over the monies due has been referred to a disputes procedure set out in a service level agreement, and the result is that monies are owed by the school to the authority;

6.2.8 Recovery of penalties imposed on the authority by the Board of Inland Revenue, the Contributions Agency, HM Revenue and Customs, Teachers' Pensions, the Environment Agency or other regulatory authorities as a result of school negligence.

6.2.9 Correction of authority errors in calculating charges to a budget share (eg pension deductions)

Before applying any such provision the authority should consider whether it is reasonable to do so. If the error dates back several years it may be questionable whether such charging is reasonable.

6.2.10 Additional transport costs incurred by the authority arising from decisions by the governing body on the length of the school day, or failure to notify the authority of non-pupil days resulting in unnecessary transport costs.

6.2.11 Legal costs which are incurred by the authority because the governing body did not accept the advice of the authority (see also section 11).

6.2.12 Costs of necessary health and safety training for staff employed by the authority, where funding for training had been delegated but the necessary training not carried out.

6.2.13 Compensation paid to a lender where a school enters into a contract for borrowing beyond its legal powers, and the contract is of no effect.

6.2.14 Cost of work done in respect of teacher pension remittance and records for schools using non-authority payroll contractors, the charge to be the minimum needed to meet the cost of the authority's compliance with its statutory obligations;

6.2.15 Costs incurred by the authority in securing provision specified in a statement of SEN where the governing body of a school fails to secure such provision despite the delegation of funds in respect of low cost high incidence SEN and/or specific funding for a pupil with High Needs;

6.2.16 Costs incurred by the authority due to submission by the school of incorrect data;

6.2.17 Recovery of amounts spent from specific grants on ineligible purposes;

6.2.18 Costs incurred by the authority as a result of the governing body being in breach of the terms of a contract.

6.2.19 Costs incurred by the authority or another school as a result of a school withdrawing from a cluster arrangement, for example where this has funded staff providing services across the cluster.

## **Proposal and rationale**

We propose to make the following minor change to section 6.2 of the Scheme for financing schools, so that local authorities are able to include funding for admission appeals in their Financial Management Schemes.

*6.2.20 Costs incurred by the authority in administering admissions appeals, where the local authority is the admissions authority and the funding for admission appeals has been delegated to all schools as part of their formula allocation.*





Department  
for Education

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**Discussion on Measures to Improvement Communication between the Schools Forum and schools and academies (including the partnerships and governors)**

The decisions list from the Schools Forum meeting of 21 October records,

“Referring also to other matters discussed during the meeting, that a paper is provided for the 9 December meeting, which outlines the measures by which communication and feedback between the Schools Forum and the partnerships and schools can be improved.”

The product of discussion at the last Forum meeting was that both the Authority and Forum Members should consider how the two-way communication between the Schools Forum and schools and academies could be improved. **As such, this paper is a ‘starter for 10’ to facilitate further discussion. It by no means represents an exhaustive list. Members are asked for their thoughts on the effectiveness of current actions and possible options for improvements, especially on how we can increase member-driven communication.**

The following communication methods are in place:

- Agendas, papers and minutes of Schools Forum meetings, and consultation papers, are published on the Council’s website and Bradford Schools Online is used (which includes a weekly news email to subscribers) to sign people to these papers and to key matters.
- School Funding Team uses the ‘latest news and updates’ page on Bradford Schools Online to inform schools and academies of significant developments, including guidance from the Authority and from the DfE. School Funding Team writes detailed guidance on e.g. budget matters.
- The Forum has previously requested that letters be sent to schools and academies on specific important matters. Letters have been sent on single status issues, on key messages around tighter financial times and, most recently, on the implementation of Bradford Council’s living wage.
- Key financial items / messages are included in the briefing notes that accompany the termly governor briefings.
- School Funding Team regularly attends the Primary Business Managers Forum and collects direct feedback. The Secondary Business Managers Forum been recently re-convened and it is expected that School Funding Team (and other teams on request) will be regularly attending these meetings. The Council’s SEN Team regularly meets with SENCOs.
- School Funding Team has attended individual meetings e.g. of the District Achievement Partnership, and of BPIP, when asked to do so to discuss specific issues or to give updates on latest information regarding school and DSG finance.
- School Funding Team uses its training sessions – inductions for new headteachers and finance managers and governance training courses – to talk about key themes and developments.
- From time to time, annual finance ‘roadshows’ have been delivered, in particular in years when there is significant change to funding systems (there hasn’t been much change since 2012 so our last round of roadshows was for changes implemented at April 2013).
- The Authority works with a series of working groups, membership of which extend beyond Forum members. School Funding Team also carries out routine visits to individual schools and uses these visits to talk to school colleagues about Forum business and key developments and to collect ‘informal’ feedback. Feedback is also collected through the routine large number of phone calls that School Funding Team manages on a weekly basis.

School Funding Team has committed to begin to write a termly newsletter, which will summarise Schools Forum business. This is will be in place shortly. It is anticipated that this newsletter will normally routinely be available through Bradford Schools Online, but with this initially being sent directly to schools and academies.

At the last meeting Members suggested two areas could be developed further:

- The Primary Area Lead Headteachers could be used to disseminate key messages and collect feedback
- The Partnerships could introduce either routine or a standing agenda item on Schools Forum business, which could be facilitated by the Authority (School Funding Team).

Andrew Redding

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(01274) 432678

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**Bradford Education Improvement Commissioning Board****Andrew Redding****12 November 2015****Attendees:**

Name	Job Title
Andrew Redding	School Finance: Chair
Sara Rawnsley	Recruitment & Retention Lead: Vice Chair
Judith Kirk	Interim Assistant Director: Education & School Improvement
Clare Skelding	Secondary Teaching Schools Representative
Christian Bunting	Primary Teaching Schools Representative
Simon Gallacher	Catholic Partnership Representative
Jayne Clark	Bradford Primary Improvement Partnership Representative
Sharon Hogan	Nursery Schools Representative
Trish Pearson	Special Schools Representative
Dianne Rowbotham	Schools Forum Representative
Yasmin Umarji	LA Primary Lead
Sara Morrissey	LA Secondary Lead
Michael Garside	Teacher Development Lead
Sanam Nazir	Education Liaison Officer : Notes

**In attendance:**

Name	Job Title
Bev George	Headteacher, Strong Close Nursery
Chris Quinn	Chair of Governors, Bingley Grammar

**Apologies:**

Name	Job Title
David Horn	Bradford Partnership Representative
Ian Morrell	Headteacher, Titus Salt
Dwayne Saxton	Head of School Improvement, Bradford College

## Department of Children's Services

Ref. No.	Action / Decision	Action/ Owner	Due Date
1	<p><b>Welcome, Introductions &amp; Apologies</b></p> <ul style="list-style-type: none"> <li>• AR welcomed everyone to the meeting and introductions were made.</li> <li>• Apologies were noted.</li> <li>• AR explained that members of the Schools Forum's working group were also in attendance to discuss the direction of 2016/17 of the DSG's centrally managed funds. <ul style="list-style-type: none"> <li>- Schools Forum (SF) has to make allocation of 2016/17 budget by the 6 January 2016.</li> <li>- This meeting is to have a discussion and then to feedback to SF at their next meeting (9 December 2015).</li> </ul> </li> <li>• JK advised that AR was voted as chair at previous meeting but following discussions had, it was felt that it was not appropriate for AR to chair. It was agreed the board needs an independent chair. AR stepped down as chair effective immediately and it was agreed that JK would chair the remaining meeting in the interim.</li> </ul>		
2	<p><b>Notes of previous meeting and matters arising</b></p> <p>The notes of the previous meeting 14 September 2015 were agreed as a true and accurate record.</p> <p>Matters arising:</p> <ul style="list-style-type: none"> <li>• Following the minutes of the meeting, it was advised any questions to be answered via AR.</li> <li>• Mutual consensus was that the funds need to be used for something new and not of the same.</li> <li>• Decisions regarding funding are to be based on impact and development.</li> <li>• The discussion at SF confirmed that the themes highlighted are being addressed with collaborations from other agencies.</li> <li>• There is a need for this group to have specific procurement support and be open to scrutiny. To look at different providers and then go to procurement.</li> <li>• There was a lack of detail with the funds allocated to the partnerships at the last meeting. This has highlighted the need to consider impact measures and the board to identify specific needs.</li> </ul>		
3	<p><b>Update on allocated funds</b></p> <ul style="list-style-type: none"> <li>• £32k for NQT programmes in schools: <ul style="list-style-type: none"> <li>- SR confirmed all schools have received funding and she has received plans back from most of LAPs.</li> <li>- Nursery schools were not initially included and this needs rectifying. SR to chase this up.</li> <li>- Schools will have at least 1 session per half term and then have the opportunity to feedback and evaluate.</li> </ul> </li> <li>• There was a discussion regarding the need to focus on impact and evaluation: <ul style="list-style-type: none"> <li>- Those wanting funds need to specify impact on measures such as the outcome of children, the effect of consistency of teaching etc.</li> </ul> </li> </ul>	SR	



	<ul style="list-style-type: none"> <li>- Is it released to the schools so everyone gets a proportion?</li> <li>- Working collaboratively – does it go to the partnership or BEICB?</li> </ul> <p>Funding rules and regulations were clarified:</p> <ul style="list-style-type: none"> <li>- Can only determine funding rates at the beginning of the financial year. Cannot be done in year.</li> <li>- Complexities around commitment – aligning use of money to outcomes of schools. Can funding be split part? Depends on whether the commitment has changed.</li> <li>- LA contribution in 2014/15 was £2.1 million. If LA funds are not used, they go back to the LA.</li> </ul> <p>Concerns raised:</p> <ul style="list-style-type: none"> <li>- Clarification needed on the current situation in order to have clear idea of what funding should be spent on.</li> <li>- Cannot use funds to benefit from individually and possibly not be kept centrally.</li> <li>- Schools may face major cuts in the future.</li> <li>- Have to consider year on year budget.</li> <li>- Use of funds needs to be robust and those requesting funds and BEICB to be held accountable.</li> </ul> <p>Possible recommendations:</p> <ul style="list-style-type: none"> <li>- Schools operate within a partnership so funds go to the partnerships</li> <li>- Smaller rates be kept centrally</li> <li>- Need to set benchmark - if over a certain amount, shouldn't go back to schools?</li> <li>- Be invested in EYs – importance of working with families (closing the gap)</li> </ul> <p>It was agreed by all that further discussion was needed and it was suggested that some members of BEICB meet with the de-delegated group. SF to make decision based on recommendations and then accountability would come through the BEICB.</p> <p>The 2 issues raised that need further discussion by the steering group:</p> <ol style="list-style-type: none"> <li>1. Recommendations for money this year (coming from certain teams such as the £442k)</li> <li>2. Discussion as to what happens to other funding in the system</li> </ol> <p><b>Actions:</b></p> <ul style="list-style-type: none"> <li>- For the SF Working Group to meet, with an invitation for BEICB members to be included, including a Special School representative</li> </ul>		
<p><b>6</b></p>	<p><b>Commissioning of further spend and mechanisms for holding or distributing funds</b></p> <p>There was a brief discussion as to how bids should be managed:</p> <ul style="list-style-type: none"> <li>- Have 5 TS across the board – should it go through the colleges?</li> <li>- TSA need to consider what is core business? If a proposal is core business, then should it be funded via the BEICB? This is to be addressed at the TSA meeting on 13 November 2015</li> <li>- Need to consider revenue income needed to make bids sustainable</li> <li>- The board needs to identify what problems are and the solution</li> <li>- Procurement is needed for complete transparency and value for money</li> </ul>	<p>CS/CB</p>	

## Department of Children's Services

	<ul style="list-style-type: none"> <li>- There should be competitive tender programmes. Funds already allocated to partnerships should also go to procurement?</li> </ul> <p><b>Actions:</b></p> <ul style="list-style-type: none"> <li>- Review BEICB TOR</li> <li>- Guidance on strategic boards (within children services) to be sent to the board</li> </ul>	<b>MG</b>	
<b>7</b>	<p><b>Any Other Business</b></p> <p>There was no other business and JK closed the meeting.</p>		
<b>8</b>	<p><b>Dates of Future Meetings</b></p> <p>Thursday 7 January 2016, 16:00 (MMT, Room 105)  Wednesday 9 March 2016, 16:00 (MMT, Room 105)  Tuesday 3 May 2016, 16:00 (MMT, Room 105)  Tuesday 5 July 2016, 16:00 (venue TBC)</p>		



## Response to questions asked by Forum Members regarding BEICB Matters

Please note that no additional questions have been submitted since the Schools Forum meeting on 21 October.

The minutes of the 21 October meeting record, “that further information be provided on the New Qualified Teachers strategy as recorded in the minutes of the BEICB’s 14 September 2015 meeting”.

This was summarised into 2 questions:

- 1) Whether the sum allocated to NQTs by the BEICB is funding ‘new activity’
- 2) Whether we have seen a significant increase in the number of NQTs in the District this year, and whether this programme designed to support this increase

In response:

- This funding (£32,400; a £200 allocation to every primary school and academy) is allocated to develop new activity as part of the ‘NQT deal’. Previously NQTs in primary schools in Bradford have had only sporadic access to training. In the establishment of the ‘NQT deal’, the Authority is seeking to ensure that all NQTs have access to good quality consistent training. The funding has been allocated with the expectation that schools will pool this at locality level to develop sustainable ‘enrichment and development’ workshops. All LAPs have developed their NQT programmes and are sharing the details of these with the Authority’s Recruitment and Retention Manager. These training programmes will be evaluated by the Recruitment and Retention Manager and by the NQTs themselves at the end of this academic year.
- There hasn’t been a significant increase in NQT numbers in the District this academic year. There is a marginal increase, which is directly proportionate to the expansion of schools throughout the District to meet the rising number of children.
  - The total number of NQTs on register at the end of the first half term in the 2014/15 academic year, who had undertaken some form of induction training so far over that term, was **483** (275 primary; 191 secondary; 17 special; 0 nursery)
  - The total number of NQTs on register at the end of the 2014/15 academic year, who had undertaken some form of induction training over the academic year, was **566** (329 primary; 216 secondary; 20 special; 1 nursery)
  - The total number of NQTs on register at the end of the first half term in this current academic year, who have undertaken some form of induction training so far over the autumn term (figure collected on 22 October), is **493** (312 primary; 166 secondary; 14 special; 1 nursery)

## 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 members with an update on the forecasted spending positions of centrally managed and de-delegated funds held within the DSG in 2015/16. This document gives members a view of the estimated value of one off monies that will be available to add to the 2016/17 DSG Headroom and a view of the uses of this funding.

### **Date (s) of any Previous Discussion at the Forum**

The 2015/16 funds were agreed by the Schools Forum as part of the recommendations on the allocation of the DSG in the meetings of January 2015. An interim update of the spending position in this year was provided in July, where the Forum was notified of an expected £2.141m of available 'uncommitted' one off monies resulting from the reconciliation of the 2014/15 closedown position.

### **Background / Context**

It is usual for underspends to be created within the DSG allocation process. This is because certain expenditure is estimated at the start of the year and the Forum has always taken a prudent approach to managing cost pressures. A normal part of the DSG allocation process then in previous years has been a reconciliation of planned vs. actual spending. Any balance from the net position of over / under spends has been added to the DSG headroom, to be spent on a one off basis in the following year.

This funding is available on a one off basis only. When previously considering such funds, the Forum has sought to avoid allocating this to meet ongoing expenditure. This paper now provides an updated view on the value of balances available by individual expenditure line.

### **Details of the Item for Consideration**

#### 2015/16 DSG Activities Spending Positions

Appendix 1 shows spend to date and forecasted further spend and estimated position at the end of the 2015/16 financial year of DSG centrally managed funds. Further explanation of some of the key lines will be given verbally at the meeting. We estimate that at 31 March 2016 the DSG will have underspent in total by **£9.940m. Please note that the £9.940m figure is estimated at this stage. The reconciliation of funds, as part of the year end closedown process in April / May 2016, will confirm the value of balances and this will be reported to the Forum. £9.940m is a figure we are confident is available.**

As shown at the bottom of Appendix 1 and then listed in Appendix 2, against this £9.940m balance:

- £0.304m of under spending has occurred in funds, where the balances should be recycled back to the DSG (Growth Fund) or should be retained for the same purpose in 2016/17 (de-delegated funds). This sum is not available for re-allocation more generally within the DSG. The removal of this £0.304m produces the final figures of £9.637m shown at the bottom of Appendix 1 and at the top of Appendix 2.
- £2.418m has already been committed by the Forum in previous recommendations for spending from 1 April 2016. This is the sum of the items listed in paragraph 1 of Appendix 2, but excluding the £0.773m of 2 year old budget, where the Schools Forum has still to make a final decision. This includes a balance of £1.175m partial provision for the cost of financial support to Belle Vue Boys (now Beckfoot Upper Heaton Academy). Forum members will be asked to consider during the 2016/17 budget setting round how further provision is made from the DSG for the full cost.
- £0.773m is recommended by the EYWG to be carried-over into 2016/17 in support of the continued development of the 2 year old free entitlement. This recommendation was previously presented to the Forum on 23 September.
- £0.766m is the value of un-committed balance within the Joint Improvement Investment Fund, which is being managed by the BEICB. We would anticipate that the Schools Forum will wish to retain any unspent sums at the end of this financial year for use from April 2016 for the purposes for which this Fund was originally established.
- £0.085m is an under spending in the total £0.105m one off monies that was allocated by the Forum to primary-aged behaviour support in 2013/14. Members will be asked to take a view on whether this £0.85m continues to be held or is released back to the DSG.

### Details of the Item for Consideration

- £0.600m is the value of secondary one off monies that were allocated by the Forum in 2014/15 in support of secondary-aged behaviour support. The Forum has received updates on the intended spending of this sum during 2015 and has asked to consider a more detailed action plan. It is proposed that this is used to help relieve the pressure on places, especially at District PRU (this was considered by the BACs Strategic Group on 30 November).
- £0.150m is the value of earmarked funding for the development of admissions processes and support, the allocation of which is to be determined. The Forum's Working Group will be considering the position of this balance at its meeting on 9 December, with a recommendation regarding retention or release to be presented to the Schools Forum on 6 January.
- The Forum should continue to set aside £1.000m of the under spending in the DSG to finance the capital loans scheme. There are currently 2 live school loans, with an outstanding value of repayment at 31 March 2016 of £31,842.
- The Forum should also continue to set aside the DSG Resilience Reserve of £2.000m. This is a completely uncommitted value of DSG. Given the amount of uncertainty currently within the school funding system, including the impact of the national funding formula, we feel that it is prudent to retain a reserve that could be used, for example, to help transition to a new system or to soften the immediate impact of change.

**In total then, and with the understanding that some of the items listed above must still be further considered by the Forum (on 6 January), we anticipate that £7.762m of the total £9.637m under spending will either be committed or specifically held in reserve to provide contingency in 2016/17. On this basis, a sum of £1.875m has not been specifically committed at this stage by the Schools Forum.**

However, this being said, the Schools Forum has made commitments previously for the following:

- To fund post opening diseconomies of scale support to Bradford Forster Academy (opened September 2015). The Forum made £1.017m of provision from the one off monies held at the end of 2014/15 to meet the cost of the first 2 years (of 5) of this support funding. The total remaining cost for the final 3 years, using the initially agreed funding model, is £0.752m; the cost for year 3 is £0.428m. **We recommend that the Forum makes provision from the one off balances available now for the year 3 cost (£0.428m).** This will leave a sum of £0.324m to fund in the future. The Local Authority has had a number of conversations with Bradford Forster Academy during 2015 about the sufficiency of the funding support model, which was agreed by the Schools Forum on 7 January 2015 and subject to review. Having reviewed the model, and having compared this with the diverse range of models used in other local authorities and by the Education Funding Agency in the establishment of new free schools, we take the view that our currently agreed financial support model strongly supports the successful establishment of this new academy.
- To provide additional financial support to Belle Vue Boys School (now Beckfoot Upper Heaton Academy). Members will recall that the financial support was made up of a number of elements, with a commitment for funding over the period 2015-2021 calculated using an agreed 'ratchet model', which will allocate additional funding according to the pupil numbers recorded at the academy in the annual October censuses. Members will understand then that the total cost to the DSG 2015-2021 will depend on the position of pupil numbers. We initially estimated that the range of cost will be between an 'upside' model, at £2.076m, and a 'downside' model, at £3.111m. The Schools Forum made provision in 2015/16 for £0.323m of additional costs associated with the maintained school, £0.110m for a lump sum support payment to the new academy and then £1.608m to support meeting the cost of payments calculated using the ratchet model (£1.608m roughly meets 80% of the cost of the upside model). Members were aware then, back in January 2015, that further sums will need to be allocated from the DSG in future years to meet the full cost. As reported in Appendix 2, we expect that £1.175m of the Forum's provision this year will be carried forward. This is the sum after the first year's payment using the ratchet model has been made (a payment of £0.547m). **We recommend that the Schools Forum makes now as much additional provision for the cost of the agreed support model as possible**, given the uncertainties around national funding formula and implications that this may have for the DSG and restrictions on the ability for us to 'top slice' the DSG, or retain under spendings, locally to meet such local agreements. **Appendix 2 shows an additional sum of £0.931m allocated to finance the support model, which would create a total available budget of £2.105m.** In effect, the £0.931m is the balancing figure of what one off funding is available after all other allocations have been made.

In addition, we have previously reported to the Forum that the transfer of 'non-recoupment' academies into the DSG has added additional cost pressure into our Schools Block, because our Schools Block is now responsible for meeting the cost of expansion in these settings. Our indicative modelling indicates an additional cost to our DSG in 2016/17 of £1.340m. We have also previously reported that we have the option to reduce the impact of this in 2016/17 to £0.827m by using one off monies to fund the expansions that cease at September 2016. **We recommend that the Forum does this, at a cost of £0.513m.** The alternative is to reduce rates of formula funding. Given that a reduction is likely to be necessary to balance the overall DSG in 2016/17, we would advise the Forum to use one off funding to minimise the impact on delegated budgets.

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

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

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

Although recognising the restrictions that the Regulations place on how the DSG can be allocated, there is a real opportunity to use these DSG balances to support the District's key educational priorities.

**Recommendations**

**The Forum is asked to consider & to note the information provided, in advance of making final recommendations on 6 January 2016. Members are also asked to consider whether any further information is needed in order for recommendations to be made.**

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

Appendix 1 – Update on DSG Funds 2015/16

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

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

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FUND NAME	2015/16 DSG Value (including any one off sums)	Spend to Date (to end October 2015)	Further Committed Spend before 31 March 2016	Further Forecasted Spend to 31 March 2016	Adjustment for in Year Changes to Academy Recoupment	Total Forecasted Spend up to 31 March 2016	Forecasted Balance at 31 March 2016	Comments
<b>Centrally Managed Funds</b>								
Schools Forum Costs	10,000	5,000	0	5,000		10,000	0	May have a small underspend, subject to cost of meetings December - March
Admissions	577,586		426,586			426,586	151,000	Showing the £151,000 as unspent; Schools Forum to consider further
Copyright Licences (actual cost confirmed by the DfE February 2015)	259,606	395,356	0	0		395,356	-135,750	DfE's Invoice now paid - actual cost £135k above estimate (balance from DSG resilience reserve below)
DSG Matched Contribution to School Improvement	1,976,403		1,976,403			1,976,403	0	Showing fully spent; some further reconciliation required following restructures; Schools Forum to consider
<b>Maintained De-Delegated Funds</b>								
ESBD School Support Team (Primary)	426,361	248,711	177,650	0	0	426,361	0	Balance to be held into 2016/17 (separate decisions on 2016/17 funds in January)
Minority Ethnic School Support Team (New to English Support)	275,151	160,505	114,646	0	-1,001	276,152	-1,001	Balance to be held into 2016/17 (separate decisions on 2016/17 funds in January)
FSM Eligibility Assessment	120,975	70,569	50,406	0	-456	121,431	-456	Balance to be held into 2016/17 (separate decisions on 2016/17 funds in January)
Fischer Family Trust Licences	33,560	33,560	0	0	-122	33,682	-122	Actual cost from FFT (invoice now paid)
School Maternity / Paternity 'insurance' fund	1,352,443	572,000	1,040,443	0	-3,404	1,615,847	-263,404	Balance to be held into 2016/17 (separate decisions on 2016/17 funds in January)
Trade Union Facilities Time	307,573	179,417	128,155	0	-1,054	308,627	-1,054	Balance to be held into 2016/17 (separate decisions on 2016/17 funds in January)
Trade Union Health & Safety Representative Time	47,000	27,417	19,583	0	-217	47,217	-217	Balance to be held into 2016/17 (separate decisions on 2016/17 funds in January)
School Staff Public Duties and Suspensions Fund	63,238	2,080	0	61,158	-161	63,399	-161	Balance to be held into 2016/17 (separate decisions on 2016/17 funds in January)
Balance of De-delegated Funds held from March 2015	328,361	0	0	0	0	0	328,361	Balance held across 2014/15 financial year end close - allocated to balance overspending above
<b>Contingencies</b>								
Growth Fund - existing permanent expansions	1,059,583	1,073,377	0	0		1,073,377	-13,794	Expenditure was known in January 2015
Growth Fund - in year permanent expansions	350,000	80,465	0	0		80,465	269,535	Underspend / Overspend is returned to ISB in 2016/17
Growth Fund - Bradford Forster Academy Pre and Post Opening	1,411,138	1,431,138	0	0		1,431,138	-20,000	Additional £20,000 pre opening budget for new DSP
Growth Fund - known bulge classes	515,802	515,802	0	0		515,802	0	Expenditure was known in January 2015
Exceptional Unforeseen Costs "Exceptional Circumstances" - Schools in Financial Difficulty	200,000	158,540	0	35,000	-673	194,213	5,787	Balance to be held into 2016/17 (separate decisions on 2016/17 funds in January)
Additional Costs Associated with New, Re-Org & Closing Schools - Safeguarded Salaries	131,721	131,721	0	0	-27	131,748	-27	Balance to be held into 2016/17 (separate decisions on 2016/17 funds in January)
Deficit of Closing School (converting Academy)	650,000	0	0	0		0	650,000	Timing of conversion and financial close is TBC (this sum is unlikely to be physically spent before 31 March 2016)
Early Years Single Funding Formula Adjustments	200,000	0	0	0		0	200,000	We won't know actual spend until the collection of the January 2016 census
<b>HNB Variable Funds</b>								
Place Plus - Special Schools	17,297,840		17,869,318			17,869,318	-571,477	Final 2015/16 Cost TBC - estimate is based on profile up to November 2015
Place-Plus - PRUs	6,103,321		5,963,414			5,963,414	139,907	Final 2015/16 Cost TBC - estimate is based on profile up to November 2015
Place-Plus - Primary Behaviour Centres	1,070,332		758,053			758,053	312,280	Final 2015/16 Cost TBC - estimate is based on profile up to November 2015
Place-Plus - DSPs	2,784,664		2,697,674			2,697,674	86,990	Final 2015/16 Cost TBC - estimate is based on profile up to November 2015
Place-Plus - Further Education (Post 16 )	1,920,000		2,387,634			2,387,634	-467,634	Final 2015/16 Cost TBC - estimate is based on profile up to November 2015
Place-Plus - Early Years Childrens Centre Plus	1,068,919		1,068,919			1,068,919	0	Final 2015/16 Cost TBC - estimate is based on profile up to November 2015
Place-Plus - Mainstream Schools & Academies	3,322,328		3,333,032			3,333,032	-10,703	Final 2015/16 Cost TBC - estimate is based on profile up to November 2015
Place-Plus - Hearing / Visually Impaired Services (ARCs and Central)	4,090,599		3,818,897			3,818,897	271,702	Final 2015/16 Cost TBC - estimate is based on profile up to November 2015
Place-Plus - Education in Hospital, Tracks and Home Tuition	1,228,368		1,228,368			1,228,368	0	Further work is to be done on possible additional pressure in home tuition provision
Discrete HNB Contingency Provision (including RCCO for new establishments)	245,198	142,670	0	0		142,670	102,528	£141k RCCOs agreed by Schools Forum March 2015
Secondary one off funds for District PRU Places (one off monies)	600,000	0	0	0		0	600,000	To be used to relieve current places pressure
Primary one off funds for additional behaviour centre places (one off monies)	105,000	20,000	0	0		20,000	85,000	Agreed funding of cash budget protection £20k; balance to be used to support transition and development
Specialist Equipment	175,000		175,000			175,000	0	Expect full spend
Early Years Inclusion	400,000		300,000			300,000	100,000	Expect £300,000 spending based on current profile & forecast
Cost of OLA, Independent & Non Maintained Provision	4,650,000		5,235,000			5,235,000	-585,000	Pressure - Final 2015/16 Cost TBC - estimate is based on profile up to November 2015 (this is a volatile budget)
<b>Other Funds / Costs / Savings</b>								
RCCO Outdoor Education Centres (one off monies)	500,000		500,000			500,000	0	Agreed by Schools Forum January 2015
2 YO underspending (including RCCO provisions - one off monies)	2,950,000	1,405,524	0	0		1,405,524	1,544,476	£300k release agreed by Forum March 2015; £773k retained / remainder proposed to be released by EYWG (reported to Forum 23.9.15)
Joint Improvement Investment Fund (one off monies) BEICB	1,245,904	0	0	480,000		480,000	765,904	See BEICB minutes 23.9.15; £400k committed to Partnerships; £80k committed to NtoE hubs. May not be spent before 31.3.16
Health and Wellbeing Service (one off monies)	80,000		80,000			80,000	0	This was a contribution to the Service; fully spent
DSG 2015/16 Allocation Adjustment			4,098,405			4,098,405	-4,098,405	July 2015 confirmed value (with EY estimates for January 2016); reductions for drop in Early Years numbers (see net underspends below)
3/4 Year Old DSG Resources	30,230,637		29,237,050			29,237,050	993,587	estimated cost of the EYSFF allocations; still based on a forecast of actual cost in spring 2016; saving due to lower numbers
2 Year Old DSG Resources	12,786,550		9,696,640			9,696,640	3,089,910	estimated cost of the EYSFF allocations; still based on a forecast of actual cost in autumn 2015 and spring 2016; saving due to lower numbers
Early Years Pupil Premium	756,558	154,513	0	602,045		756,558	0	Any underspending will need to be returned to the EFA
Bingley Grammar Exceptional Premises Factor 2015/16 (one off monies)	130,600	130,600	0	0		130,600	0	Allocated to the school in S251 budgets confirmed in March 2015, as agreed with the Schools Forum January 2015
Support for Outdoor Education Centres (revenue budgets) (one off monies)	456,000	228,000	0	0		228,000	228,000	2015/16 is the 2nd of 3 years of financial support agreed by the Schools Forum; at £228,000 per year
Financial Support for Belle Vue Boys (Beckfoot Heaton Academy)	2,041,475	866,972	0	0		866,972	1,174,503	2015/16 is the first year of support as agreed with the Schools Forum; the unspent balance is committed to future years
DSG Resilience Reserve	3,000,000	31,842	0	0		31,842	2,968,158	Originally established by the Forum January 2013 from one off funds; retained January 2015
Building Schools For the Future (DSG Affordability Gap)	6,289,922	6,289,922	0	0		6,289,922	0	Final cost may vary slightly from this (RPIX reconciliation)
Position of Rates Account 2015/16 (incorporating adjustments for academy conversions)		80,000	0	20,000		100,000	-100,000	Position to be confirmed following year end reconciliation
<b>Total of Funds 2015/16</b>							<b>7,798,422</b>	
<b>VALUE OF BALANCES THAT SHOULD BE RECYCLED INTO DELEGATED BUDGETS / DE-DELEGATED FUNDS IN 2016/17</b>							<b>303,448</b>	
<b>ADDITIONAL UNALLOCATED BALANCE AVAILABLE FROM 31 MARCH 2015 RECONCILIATION</b>							<b>2,141,875</b>	
<b>ESTIMATED TOTAL DSG UNDERSPEND "AVAILABLE" AT THE END OF THE 2015/16 FINANCIAL YEAR</b>							<b>9,636,849</b>	

Total Estimated Value of underspend in the DSG at 31 March 2016

£9,636,849

<b>1) Schools Forum has previously committed to spending these items after April 2016</b>	Value	Phase	Comments
Financial Support for Belle Vue Boys School (Beckfoot Upper Heaton Academy)	£1,174,503	Secondary	Agreed by the Schools Forum 7 January 2015
Post Opening (Dis-economies of Scale) Funding for Bradford Forster Academy - protection15/16 at 210 for 1 year	£165,500	Secondary	Agreed by the Schools Forum 7 January 2015
Revenue support for the developing business model for the Outdoor Education Centres (£228,000 for 1 further financial year)	£228,000	All	Agreed by the Schools Forum 7 January 2015 (continuing previous agreement)
Funds from underspending on 2 Year Old DSG Budget allocated to EYIP (SEND) in 2016/17	£200,000	Early Years	Agreed by the Schools Forum 7 January 2015
Retention of 2 Year Old DSG funding for places capacity building and impact evaluation work after April 2016	£773,400	Early Years	Recommended by the EYWG and tabled at the Schools Forum 23 Sept 2015; decision still to be taken
Deficit of a Secondary School converting to Academy Status (to be used at the point the school converts)	£650,000	Secondary	Agreed by the Schools Forum 7 January 2015 (continuing previous agreement)
<b>Total of Previous Commitments</b>	<b>£3,191,403</b>		
<b>2) Schools Forum Committed / Earmarked to spend on these items in this current year, but full spend has not taken place</b>	Value	Phase	Comments
Joint Improvement Investment Fund (balance remaining after £480,000 commitment); not all spend is expected in 2015/16	£765,904	All	Agreed by the Schools Forum 7 January 2015
Primary Behaviour Support (Primary Behaviour Centres)	£85,000	Primary	Balance net of £20,000 budget protection for the Centres. To be available to support further development and transition
Secondary Behaviour Support	£600,000	Secondary	To be used to relieve current places pressure
Admissions (additional support activities)	£151,000	Primary & Secondary	To be further considered by the Schools Forum
<b>Total of Earmarked Funding not yet spent</b>	<b>£1,601,904</b>		
<b>3) Loans Provision (£1m earmarked within the total £3m DSG resilience reserve; Agreed with the Forum 7 Jan 2015)</b>	Value	Phase	Comments
	£968,158	All	2 loans currently live with £31,842 balance to repay at 31 March 2016
<b>4) Retention of the DSG Reserve (the element not committed to loans)</b>	Value	Phase	Comments
	£2,000,000	All	
<b>Total Value of One-Off Monies Committed or held in Reserve *</b>	<b>£7,761,465</b>		
<b>Total Value of Uncommitted One-Off Monies available for re-allocation *</b>	<b>£1,875,384</b>		

\* These figures are subject to change where the Forum reviews the status of the commitments especially in sections 2, 3 and 4 above

**If the TOTAL value of uncommitted One-Off Monies above was allocated on a phase specific basis, the breakdown would be:**

based on pupil numbers with a weighting in recognition of the total Primary:Secondary ratio (as per previous Schools Forum reports)

Early Years (weighting 1.02)	£107,464
Primary (weighting 3.25)	£1,403,002
Secondary (weighting 1.00)	£242,763
High Needs (weighting 4.50)	£122,155
<b>Total</b>	<b>£1,875,384</b>

<b>Possible / Proposed Immediate Use of Uncommitted One-Off Monies</b>	Value	Phase	Comments
Post opening dis-economies of scale funding for Bradford Forster Academy	£427,598	Secondary	The value of allocation for the 3rd year (of 5) as agreed; to be paid in advance; leaves £324k to fund the final 2 years
Financial Support for Belle Vue Boys (Beckfoot Heaton Academy) - further provision for the agreed ratchet model	£930,737	Secondary	Provision for future year cost (total provision of £2.10m would be made); total cost TBC on pupil numbers
Meet the cost of expansion in the non-recoupment academies transferred into the DSG, where expansion ceases at September 2016	£517,049	Primary & Secondary	Limits the impact of this additional cost on formula funding (reduces the value of toplice required to formula rates)
<b>Total of Possible / Proposed Use of One-Off Monies</b>	<b>£1,875,384</b>		

VALUE UNALLOCATED

£0

## 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 Forum with an update on the 2016/17 DSG, in advance of the formal announcement by the Government expected later in December and the Forum being asked to make final recommendations on its allocation on 6 January 2016.

### **Date (s) of any Previous Discussion at the Forum**

The Forum has been made aware of possible cost pressures on the DSG in 2016/17 within recent meetings (especially 23 September 2015 Document EZ). The Forum has not yet discussed in detail the 2016/17 DSG.

### **Background / Context**

As in 2015/16, our DSG allocation in 2016/17 will be split into 3 'notional' blocks:

- Schools Block – Primary & Secondary school budgets and School Block de-delegated items, central items and contingencies
- Early Years Block – the Early Years Single Funding Formula and centrally managed items and contingencies relating to early years provision
- High Needs Block – funding provision for children with needs valued at greater than £10,000 per annum, including Special schools, PRUs and Post 16 students in FE Colleges.

In the allocation of the DSG this financial year, Forum Members will recall that the total of planned expenditure on high needs exceeds the notional High Needs Block allocation from the DfE by £3.97m. This 'overspend' is afforded by contributions from the Early Years and, primarily, from the Schools Block. The reconciliation of the 2015/16 position can be found in the separate Document FM. 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. This paper concentrates on cost pressures at DSG level, rather than pressures on individual school and academy delegated budgets. The 2016/17 DSG has not yet been fully announced in detail. We expect this later in December. Members will be aware, however, of the anticipated move to a National Funding Formula in 2017, with 2016/17 having been announced as 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%.

### **Details of the Item for Consideration**

#### The 3 Notional DSG Blocks

The current 2015/16 financial year DSG allocations (prior to mainstream academy recoupment) are as follows:

- |                     |                  |
|---------------------|------------------|
| • Schools Block     | £410.646m        |
| • Early Years Block | £40.786m         |
| • High Needs Block  | £45.849m         |
| <b>Total</b>        | <b>£497.281m</b> |

Our value of per FTE pupil funding for the Schools Block is £4,869 and this will remain at the same value in 2016/17. We receive this for every child recorded in the October 2015 Census in Primary & Secondary schools and academies. We anticipate being funded for an additional 860 pupils in 2016/17, subject to confirmation, from the growth in numbers in this academic year. We estimate then that we will receive at least an additional £4.20m in Schools Block funding in 2016/17. The first call on this funding increase will be the additional cost of delegated budgets for schools and academies with increased numbers. We do not anticipate much available headroom remaining after meeting this cost.

### Details of the Item for Consideration

Our per FTE pupil funding value for the Early Years Block is £4,928. We receive this for every FTE 3 / 4 year old child in nursery provision that will be recorded in the January 2016 (5/12th) and January 2017 (7/12ths) Censuses. The DfE has **not yet** confirmed that this value will remain the same in 2016/17. The DfE has also **not yet** confirmed that the DSG funding rate for the 2 year old entitlement will remain at least as 2015/16, at £4.85 per hour. It is more difficult at this stage to predict the total value of funding that will be available. As we have done in previous years, it is safer not to assume a significant increase in funding from the growth in 3 / 4 year old numbers. Where numbers grow, we will receive additional DSG funding to allocate in year to providers. Generally speaking, we would expect cost pressures within the Early Years Single Funding Formula to be met from the Early Years Block, including any pressures from the 2 year old offer.

We are not yet fully certain of the value of our High Needs Block in 2016/17. However, as stated in the background section of this paper we have been told that we cannot expect any 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. We forecast and have calculated new pressures within this Block in 2016/17, further details of which were discussed in the High Needs funding consultation paper and are shown below. Our current model indicates a growth in pressure of £2.63m. This position would mean that our High Needs Block is expected to continue to exceed our notional DSG allocation in 2015/16; by approximately £6.60m; increased from £3.97m in 2015/16.

### List of Cost Pressures & Considerations for 2016/17

**In summary, our INDICATIVE forecast currently identifies a funding gap of around £2.77m in the 2016/17 DSG. However, there is much that still needs to be confirmed.** At this stage, it is useful for Forum members to be aware of how the position is expected to change from 2015/16, following our estimates of likely expenditure. Our indicative model currently shows the following changes in the overall spending vs. notional allocation position by Block (negative = underspend; positive = overspend):

<b>DSG Block</b>	<b>2016/17</b>	<b>2015/16</b>	<b>Diff</b>
Schools Block	- £3.55m	- £3.63m	+ £0.08m
High Needs Block	+ £6.60m	+ £3.97m	+ £2.63m
Early Years Block	- £0.28m	- £0.34m	+ £0.06m
<b>Total</b>	<b>+ £2.77m</b>	<b>+ £0.00m</b>	<b>+ £2.77m</b>

These figures have been calculated based on maintaining a 'cash flat' position for formula funding (the values of formula variables remain as 2015/16, but with the removal of any one off monies and also with a small number of technical adjustments).

**The DfE's announcement of our DSG allocation, plus the re-calculation of delegated budgets using the full October 2015 confirmed dataset, both of which will be available later in December, will allow us to finalise this position. The final position will be presented to the Forum on 6 January and it is on this basis that members will make final recommendations on the 2016/17 Schools Budget.**

**If the final position is as estimated above, the Forum will need to take steps to reduce spending in the DSG by £2.77m in order for the 2016/17 Schools Budget to balance. This is likely to include consideration of reductions in formula funding rates across all phases and blocks.**

The following gives an overview of the main additional costs within the DSG in 2016/17. These are pressures that would not be automatically supported by an increase in DSG funding from the DfE nor that are expected to be met through the allocation of one off monies. Please note that there aren't any specific significant additional pressures within the Early Years Block to consider here.

#### **Schools Block**

- The cost of expansion in former non-recoupment academies now transferred into the DSG (£0.826m, which is £1.34m minus £0.517m of one off monies).
- Increase in the cost of rates (£0.39m).
- Increase in split site formula costs (£0.205m).
- Inflation on the DSG's Building Schools for the Future affordability gap contribution (£0.034m TBC).
- Expected increased cost of central copyright licences charge (£0.02m TBC).

#### **High Needs Block**

- Cost of growth in high needs post 16 places in Further Education that are funded on a lagged basis (£1.19m).
- Cost of growth in high needs places in special school and academies, including currently unallocated places (£1.08m).



**Details of the Item for Consideration**

- Growth in cost (estimated) of OLA & Independent behaviour placements (£0.50m TBC). Proposal to reduce this cost by £0.384m by adjusting places in Bradford located behaviour provisions.
- Cost of growth in DSPs and resourced provisions (£0.23m).
- Inflation on the DSG's Building Schools for the Future affordability gap contribution (£0.007m TBC).

Much of the pressure comes from an increased number of funded places to meet current demand, as reported in Document FP, the Authority forecasts that 1,986 SEN and Alternative Provision places will be purchased in the 2016/17 academic year. The planned 2016/17 DSG budget currently also includes provision for a further 10 places at April 2016 and a further 20 places at September 2016; these places are not yet specifically allocated to an individual setting.

The current 2016/17 DSG calculations include no further provision (as yet) for an increase in the number of funded places at alternative provision settings, other than an increase in 10 places at Oastler School for the establishment of Post 16 provision.

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

As outlined in this paper.

**Recommendations**

**Members are asked to consider the information presented in the report, in advance of making final recommendations on 6 January 2016**

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

None

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## SCHOOLS FORUM AGENDA ITEM

For Action



For Information



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

**This report asks Members to consider the outcomes of the consultation on the 2016/17 High Needs Funding Model and the planned number of high needs places to be commissioned by the Authority. This report also gives an update on the position of other strategic high needs funding matters. These updates are provided in advance of asking Members to make recommendations on 6 January 2016.**

### **Date (s) of any Previous Discussion at the Forum**

The Forum considered and agreed the consultation on the 2016/17 high needs funding model at the last meeting. High needs funding is regularly discussed by Members.

### **Background / Context**

Members are reminded that the DfE has announced that 2016/17 is a 'stand-still' year and no major technical changes are being made to the funding framework in so far as this affects high needs providers. 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 high needs 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 2015/16 levels.
- The Minimum Funding Guarantee, including for special school funding, is set again at minus 1.5%.

Members are also reminded that the total of planned expenditure on high needs in 2015/16 exceeds the notional High Needs Block allocation from the DfE by £3.97m. The size and growth of the cost pressure within the High Needs Block remains one of the key issues the Forum must continue to manage. This pressure is related to the growth in the number of places required in specialist provisions and the need to increase the capacity of support / outreach services for mainstream settings. The challenging aspect of the 2016/17 funding position will be managing the additional financial pressure from a cash flat funding settlement. This will dominate the Schools Forum's discussions on the 2016/17 DSG allocation.

A report was presented to the Forum in September 2015, which identified that there is an approximate £0.92m growth in pressure in the High Needs Block in 2016/17, before any additional places are provided for. As the separate DSG update report at this meeting shows, we now identify a £2.6m growth in pressure, inclusive of an estimated number of additional places.

As explained at the last meeting, further work has been undertaken to look at the options that are available to manage the additional cost pressures within the High Needs Block in 2016/17. The Authority has met with the SEN Reference Group and also with the District Achievement Partnership and the BACs Strategic Group. The SEN Reference Group has also begun to discuss the possible implications and risks associated with funding changes (national funding formula) and other key strategic matters, including the sufficiency of places. Information on these is presented in brief in this report under items of further action.

The Council's 2015/16 budget document, currently out for consultation, proposes the re-commissioning of SEND teaching services and the development of SEND centres of excellence based in schools. We would expect then the allocation of the High Needs Block to re-align alongside this during 2016/17.

### **Details of the Item for Consideration**

The consultation on the structure of our High Needs Funding Model for the 2016/17 financial year has now been completed. As reported under matters arising, the specific issue relating to the funding of the Further Education sector, that was raised at the last meeting, has been resolved.

It is helpful to begin this report with a summary of the proposals, as they currently stand, for the 2016/17 DSG allocation and a summary of the further actions that have been identified, looking towards the development of our high needs provision and funding strategies in the context of a growth in pupil need, tighter financial times and the possible implications of a national funding formula from April 2017. Further detail behind these proposal and actions are included later in this report.

### Details of the Item for Consideration

**Following consultation, and further work that has been undertaken, the following initial proposals for the 2016/17 High Needs Block (HNB) are put forward for the Forum's consideration:**

- To retain all current budget allocations within the High Needs Block in the 2016/17 financial year unless otherwise specifically stated. This is done on the understanding that the proposed re-commissioning of SEND teaching support services (proposed in the Council's budget consultation for 2016/17) may mean that centrally managed budgets are re-allocated (to schools) during the financial year.
- To retain the existing structure of the High Needs Funding Model (Place-Plus) to calculate delegated allocations for the 2016/17 financial year but with the following amendments\*:
  - To remove the Bradford-Specific Minimum Funding Guarantee factor for Special Schools and Academies and DSPs (as proposed in the consultation document) from 1 April 2016.
  - To only calculate additional place-led funding (where settings may admit children above their planned place number) at the end of the financial year on a composite monthly occupancy figure. Settings will continue to be funded for all additional places at the £10,000 value.
- To calculate the initial planned cost of High Needs Block spending in 2016/17 on the allocation of places for Bradford-located settings outlined in Appendix 1; a total of 1,986 for the 2016/17 academic year. To add to this cost additional, currently unallocated, provision for a further 10 places at April 2016 and 20 places at September 2016 (calculated at £20,000 per place).
- Responding to the changing distribution of children with hearing and visual impairment, the funding released from the reduction in places in the ARCs (see Appendix 1 – reduced by 18) is transferred to be available a) to meet the cost of placements in other delegated settings and b) to ensure that the centrally managed service has sufficient capacity to support children in mainstream settings.
- Subject to further discussion currently taking place on the sufficiency of places, to retain as a minimum the 370 secondary-aged alternative provision places currently funded by the DSG and to continue to apply the established principle that the distribution of these places can move flexibly with the needs of students as identified by the Local Authority and the BACs and that the total number of places can be exceeded where a clear mechanism is in place for the DSG to be reimbursed for the cost of these from the BACs. See action points below and Appendix 2.
- To allocate the £600,000 of secondary one off monies to help resolve the immediate pressure for places, especially at District PRU.
- To meet the other cost pressures within the High Needs Block outlined in Document FN (DSG summary). This includes the cost of non-maintained and independent placements.
- To control the growth in cost pressure / to help support meeting the funding gap in the overall DSG that is the result of the growth in pressure in the High Needs Block by making the following adjustments:
  - To reduce the rates of Top Up in the HNB Funding Model for all Place-Plus calculated budgets by the same % that Early Years, Primary and Secondary variables are reduced by in order specifically to meet the funding gap, up to a maximum of 1.5%. That the values of Top Up for each Range are reduced by the same %. The % reduction will be further considered by the Schools Forum on 6 January 2016.
  - That the same % reduction (up to a maximum of 1.5%) is made to all centrally managed / non-Place-Plus HNB budgets.
  - That the specialist equipment budget for special schools and academies is reduced by 50% at 1 April 2016, to £37,500.
- To meet the remaining cost of the increase in spending in the HNB that cannot be managed within the HNB in 2016/17 by taking an increased contribution from the Early Years and Schools Blocks. This will require a reduction in formulae rates in these blocks.

\* There is a specific matter that has been raised by Central PRU regarding the use of the 10<sup>th</sup> of the month as a census point in the months following school holidays. The Authority is currently working with Central PRU to assess / determine whether an adjustment is needed to our Place-Plus calculation.

**The following bullet points summarise the key further actions that have been identified. These actions will influence HNB spending in 2016/17, but also, perhaps more importantly, spending in future years:**

- The impact of the National Funding Formula (including on our Ranges Model and descriptors of need)
- The development of the sector-led delivery model for High Needs Block activities. The Council's 2015/16 budget proposals, that are currently out for consultation, propose the re-commissioning of SEND teaching services and the development of SEND centres of excellence based in schools.
- The development of the review of ASD provision.
- The implementation of the review of Early Years SEND provision.
- The development of Education in Hospital / medical home tuition provision and funding.
- The development of provision for students aged 16-25 and the implications of the Post 16 reviews.
- Completion of the review of primary-aged behaviour support.
- Reviewing the sufficiency of secondary-aged behaviour support provisions, including what additional provision should look like and how this could be afforded. In the very short term, there is a need to ensure that the financial relationships for the funding of alternative provision between schools, the Authority, the DSG, the BACs and the PRUs are clear and fully established and that immediate pressures and blockages are resolved.

### Details of the Item for Consideration

- A strategic review of our distribution of children with SEND and our number of HNB places in comparison with those in other local authorities. This was initially considered at the last Schools Forum meeting, in the context of the imperative to accelerate outcomes for children across the Bradford District, tighter financial times, the possible impact of a national funding formula, the review of Post 16 provision, the requirement to increase places to meet demographic growth and the lack of capital resource to build new schools. Do we have a sufficient number of places in specialist provisions? Recognising that a greater proportion of children with SEND are educated in mainstream settings in Bradford than in other authorities, what is the impact of this and what are the implications as budgets become tighter? What are the options if a national funding formula from April 2017 begins to significantly reduce the delegated budgets of our early years settings, primary and secondary schools and academies?

### Feedback to the Consultation

The Forum agreed to the publication of the consultation document at its meeting on 21 October. The document was published on Bradford Schools Online and was also shared with the convener of the District Achievement Partnership (DAP) and the Business Advisor (Schools) has met with the DAP during the consultation period. The DAP's specific feedback has been incorporated into the proposals for 2016/17 that are outlined on the previous page. The Business Advisor (Schools) met with the BACs Strategic Group on 30 November and their specific feedback is recorded in the 'behaviour support' section below.

In addition, 2 written responses to the consultation have been received, one from a special school, agreeing generally with the proposals on the structure of the formula but asking that the time frame for the assessment of children with SEND to be shortened, and one from Education in Hospital provision, asking for a specific review of the number of Education in Hospital places and expressing concern that the current Ranges Model does not appropriately fund support for children with mental health difficulties and asking for this to be reviewed. In response, the review of Education in Hospital provision and funding is identified as an area for further work.

As referred to on the previous page, a specific matter that has been raised by Central PRU regarding the use of the 10<sup>th</sup> of the month as a census point in the months following school holidays is currently being investigated.

### Initial Planned Places to be funded from the High Needs Block 2016/17

The consultation document included a table of provisional planned places for the 2016/17 financial and academic years. These places have been revised, following further work, and an updated table is shown in Appendix 1. In total on this basis, including the provision for an additional 20 places currently unallocated, the DSG is financing 103 more SEND places for the 2016/17 academic year than was originally planned for the 2015/16 academic year in Bradford-located settings. In addition, the DSG is currently funding 70 additional places in non-maintained special schools and independent schools, which is 14 more in total than the initial 2015/16 number.

A return to the Education Funding Agency, for further education settings and academies, was submitted mid-November on the basis of these numbers. Appendix 1 clearly shows the growth in places in the further education sector.

The current 2016/17 DSG calculations include no further provision (as yet) for an increase in the number of funded places at alternative provision settings, other than an increase in 10 places at Oastler School for the establishment of Post 16 provision. The 103 additional places are expected to be distributed across SEND provisions. As identified at the bottom of Appendix 1:

- Discussion is continuing on the allocation / distribution of places between PRU settings. District PRU's places have (notionally) been reduced by 14 to compensate for the increase in OLA / independent placements (to maintain the overall number of DSG funded places to 370). How the 14 places are actually to be adjusted for across PRU settings is currently being discussed alongside the sufficiency of the total 370.
- Early Years SEN / Children's Centre Plus is currently under review / transition. The places numbers by setting are as 2015/16, to provide for an equivalent DSG planned budget for Early Years SEN in 2016/17, understanding that the actual distribution of these places, between settings and between delegated and centrally managed services, is still to be determined.

### Cost Saving Measures in High Needs Block for 2016/17

The proposals for 2016/17 listed on the previous page incorporate a number of areas of 'saving' or contribution from the High Needs Block to the overall DSG affordability gap that is generated from increasing the number of SEND funded places in 2016/17 by 103. The SEN Reference Group has considered a number of wider possible options; those being put forward are ones that are achievable for 2016/17 but also are considered reasonable in the context of growing financial pressure across all parts of the school funding system. The table of wider possible options has also been shared with the DAP. These options include reviewing provision and funding of Post 16 students in special schools and academies, which would require more significant change and more strategic considerations in the context of the overarching post 16 review.

### Details of the Item for Consideration

For reference, the estimated total 'saving' from the proposals that are put forward are £641,500, as follows:

- |   |          |
|---|----------|
| • Removal of the Bradford-Specific Minimum Funding Guarantee factor | £320,000 |
| • Reduce all Place-Plus Top Up rates e.g. by 1.5%                   | £197,000 |
| • Reduce all HNB centrally managed / non Place-Plus budgets         | £87,000  |
| • Reduce the special school's specialist equipment budget by 50%    | £37,500  |

### Behaviour Support

Please see Appendix 2 for an update on behaviour support provision. This separate report outlines the key issues, challenges and developments. The main point of feedback from the BACs Strategy Group (secondary-aged provision), from the meeting held on 30 November, is that the current 370 alternative provision places for secondary-aged pupils, funded by the HNB, is not sufficient to meet demand. There is a need to provide and fund greater capacity, especially for long-term pupil placements at Key Stage 3. That a significant number of the 370 places are increasingly already occupied year on year is exacerbating pressure for places. It is recognised that the landscape in Bradford is changing and that the District's behaviour strategy and alternative provision must take account of this in the medium term. Whilst a structural solution is developed (including consideration to how this would be funded) the £600,000 of one off monies should be allocated to help relieve current places pressure.

To repeat, for the sake of clarity, the current 2016/17 DSG calculations (the £2.77m funding gap) include no further provision for an increase in the number of funded places at alternative provision settings, other than an increase in 10 places at Oastler School for the establishment of Post 16 provision.

### ASD Review Update

The existing SEN Strategy runs until the end of 2015. At the request of the SEND Strategic Partnership, the Interim SEN Strategy Managers have been commissioned to develop a new SEND Strategic Plan. This will cover the period 2016 to 2018. An early draft document has been presented to the SEND Strategic Partnership and comments have been invited from all key partners. Further development work is scheduled to take place in early December. A final draft will be presented to the SEND Strategic Partnership on 17 December. There will be an agreed communication framework to share the new strategy with a wide range of stakeholders across the District.

The strategy will be underpinned by an action plan, which will be governed by the principles of co-production, multi-agency working and quality control. The action plan will have a number of work streams. These include a) data and planning, b) joint commissioning, c) statutory EHC assessment, d) raising achievement, e) funding and personal budgets, f) information, communication and the local offer, g) post 16 and preparation for adulthood.

A lead officer will be identified to take forward each work stream and through a task and finish group model will develop the detailed action plan for each work stream. The data and planning work stream will cover robust data and a clear understanding of what it is saying, it will address the sufficiency of specialist places in Bradford and the implications for out of district placements and it will consider a review of current specialist provision through an options appraisal. The work undertaken so far in relation to the additional specialist places for 2018 will therefore be incorporated into this work stream as part of the overall strategic plan for the District.

It is anticipated that the SEND Strategy will be reviewed on an annual basis. The work streams will report to the SEND Strategic Partnership on a monthly basis. The SEND Strategic Partnership will report to the Health and Well Being Board, Children's DMT and the Children's Trust Board.

### Early Years SEND Review

An interim structure has been established for the 0-7 SEND Service, which is in place from the 1 December 2015. This includes the movement of staff from Early Childhood Services and the associated budgets into the SEN Team.

The total value of DSG SEND planned budgets allocated in support of early years in 2015/16 is £2.31m, which includes the budgets for Children's Centre Plus provision, Portage, Early Years Inclusion Panel and Pre-5 Learning Support Services.

The Council's 2015/16 budget proposals, that are currently out for consultation, propose the re-commissioning of SEND teaching services and the development of SEND centres of excellence based in schools. The detail of how this change will be delivered (if agreed) for Early Years SEND is under development.

### **Details of the Item for Consideration**

#### **Strategic Review of SEND Provision in the context of Outcomes, Tighter Financial Times and National Funding Formula**

This was referred to and initially briefly discussed by the Schools Forum at the last meeting, when it was reported to Members that the SEN Reference Group has been presented with some simple benchmarking data on our High Needs Block spending and our number of places in specialist settings compared against the position in other local authorities. A summary of a sequential view of this data is as follows:

- The F40 Group's modelling suggest that, under a fairer national funding formula, Bradford's per pupil funding in primary and secondary schools would be £175 lower than currently. Our modelling (presented to the Schools Forum on October) clearly demonstrates that our values of funding to schools for children with multiple additional educational needs are substantially higher than the national average. These pieces of data, together, indicate that we currently allocate more DSG into primary and secondary school budgets than in other authorities. This is confirmed when we benchmark our total values of Schools Block and High Needs Block in 2015/16; our Schools Block is £19.0m higher than the national average and our High Needs Block is £12.3m lower than the national average. This £12.3m is the stand out figure. It indicates that, although we are funded at a rate in total that is higher than the national average (what we would expect given the levels of need of our pupils), our HNB spending is much lower. The reason for this must not be because we have a lower level of need; it must be because we are meeting need in a different way and our funding distribution reflects this. This boils down to inclusion.
- Rough benchmarking the number of specialist places funded by our High Needs Block evidences that we have significantly fewer funded places in discrete specialist settings than found in other authorities:
  - In relation to 0-19 population, Bradford's DSG funds 1 SEND place in Bradford-located settings for every 116 young people. The national average is 1 for every 83; on this basis Bradford has 518 fewer places proportionately than the national average.
  - Alongside this, Bradford's DSG spends £27 per young person on SEND / alternative provision placements in independent / non maintained settings. The national average is £70; on this basis Bradford spends £6.2m less on such places in cash terms than the national average.
  - For alternative provision, for reference, Bradford's DSG funds 1 place in Bradford-located settings for every 429 young people. The national average is 1 for every 512 young people.
- This data helps us better understand our distribution of DSG funding and also helps us identify risks (both financial and to education outcomes) associated with tighter financial times and a national funding formula. The SEN Reference Group has agreed that this data helps us attain a clearer understanding of the pressures that are currently and increasingly being felt by mainstream and specialist settings in meeting the needs of young people.
- Recognising that a greater proportion of children with SEND are educated in mainstream settings in Bradford than in other authorities, key line of inquiry are, what is the impact of this and what are the implications as budgets become tighter? What are the options / how do we need to respond if a national funding formula from April 2017 begins to significantly reduce the delegated budgets of our early years settings, primary and secondary schools and academies?

Forum Members should consider this in their interpretation of impending announcements around national funding formula and in thinking about how the DSG continues to fund support for high needs pupils. This will be a critical area of review over the next 12 months.

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

Yes – as presented above.

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

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

#### **Recommendations**

**The Forum is asked to agree the structure of the High Needs Funding Model for the 2016/17 financial year.**

**Members are asked to consider whether sufficient information has been provided to enable final recommendations on the 2016/17 High Needs Block to be taken on 6 January 2016.**

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

Appendix 1 - Consultation on Funding High Needs Provision 2016/17  
Appendix 2 – Update on Behaviour Support Provision

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**Initial Allocated Planned Places to be funded from the High Needs Block 2016/17 Academic Year  
(Bradford Located Provisions)**

<b>Setting</b>	<b>Type (AP or SEN)</b>	<b>October 2015 Occupan cy (FTE)</b>	<b>15/16 Initial AY Funded Places (FTE)</b>	<b>16/17 FY April – Aug Updated Planned Places (FTE)</b>	<b>16/17 AY Sept - Mar Initial Planned Places (FTE)</b>
Primary PRU	AP	33	42	42	42
Central PRU *	AP	47	50	50	50
Ellar Carr PRU *	AP	49	45	45	45
District PRU *	AP	120	160	146	146
Acorn Centre	AP	6	10	10	10
Horizons Centre	AP	8	10	10	10
Long View Centre	AP	7	10	10	10
Phoenix Centre	AP & SEN	12	20	20	20
Early Years Canterbury Nursery School **	SEN	1	12	12	12
Early Years Hirst Wood Nursery School **	SEN	1	12	12	12
Early Years St Edmund's Nursery School **	SEN	10	12	12	12
Early Years Strong Close Nursery School **	SEN	6	12	12	12
Early Years Barkerend (Children's Place) **	SEN	7	10	10	10
Early Years Woodroyd Children's Centre **	SEN	3	10	10	10
ARC - Girdlington Primary School	SEN	15	20	17	17
ARC - Swain House Primary School	SEN	16	25	20	20
ARC - Grove House Primary School	SEN	10	12	12	12
ARC – Hanson School	SEN	53	65	55	55
Special – Beechcliffe School	SEN	107	99	103	103
Special – Chellow Heights School	SEN	183	165	180	180
Special – Delius School	SEN	100	110	110	110
Special – Hazelbeck Academy	SEN	125	125	125	125
Special – High Park School	SEN	93	96	96	95
Special – Phoenix School	SEN	77	80	80	78
Special – Southfield Academy	SEN	226	225	225	222
Special – Oastler School	SEN	76	80	90	90
DSP – Carrwood Primary School	SEN	4	8	8	4
DSP – Denholme Primary School	SEN	6	8	8	8
DSP – Green Lane Primary School	SEN	13	10	13	10
DSP – High Craggs Primary School	SEN	2	6	6	6
DSP – Crossflatts Primary School	SEN	7	6	6	12
DSP – Beckfoot Academy	SEN	8	12	12	10
DSP – Oasis Academy (Lister Park)	SEN	2	9	9	4
DSP – Southfield Grange Campus	SEN	22	21	22	22
DSP – Parkside School	SEN	14	16	16	12
DSP – The Holy Family Catholic School	SEN	14	14	14	12
DSP – Thornton Grammar School	SEN	11	17	17	14
DSP – Titus Salt School	SEN	16	17	17	15
DSP – Bradford Academy	SEN	23	22	22	22
DSP – Haworth Primary School	SEN	3	6	6	6



DSP – Bradford Forster Academy	SEN	2	6	6	6
DSP – High Park Learn and Play	SEN	16	16	16	16
Education in Hospital – Airedale	SEN	6	22	22	22
Education in Hospital – BRI	SEN	15	11	11	11
Tracks	SEN	8	16	16	16
Post 16 in mainstream Bradford settings (schools and academies)	SEN	38	38	38	38
Further Education – Bradford College	SEN	85	78	78	105
Further Education – Shipley College	SEN	88	80	80	93
Further Education – Aspire-Igen (Bradford)	SEN	6	6	6	14
<b>Total Initial Allocated Planned Places</b>		<b>1,800</b>	<b>1,962</b>	<b>1,963</b>	<b>1,986</b>

\* Please note that discussion is continuing on the allocation / distribution of these places between settings. District PRU's places have (notionally) been reduced by 14 to compensate for the increase in OLA / independent placements (to maintain the overall number of DSG funded places to 370). How the 14 places are actually to be adjusted for across PRU settings is currently being discussed alongside the sufficiency of the total 370.

\*\* Early Years SEN / Children's Centre Plus is currently under review / transition. The places numbers by setting are as 2015/16, to provide for an equivalent DSG planned budget for Early Years SEN in 2016/17, understanding that the actual distribution of these places, between settings and between delegated and centrally managed services, is still to be determined. The management of Children's Centre Plus provision transferred from Early Childhood Services to SEN on 1 December 2015. The low October occupancy is reflective of the significant staffing challenges, which are being addressed.

### Schools Forum

#### Behaviour Strategy Update 9 December 2015

A Behaviour Strategy Steering Group has been meeting and as a result a draft Behaviour Strategy will be presented to the group on Monday 7 December 2015. A recommendation to the group will be the establishment of a Behaviour Strategy Strategic Partnership (BSSP) which will include partners across Children's Services including Education, Social Care, Health, Police, Youth Offending Team and the voluntary and community sector. It will also include other partners within the Council for example, Youth Services. The BSSP will replace the previous Steering Group. Terms of reference, governance and an action plan, with associated task and finish groups, will be finalised on 7 December. The purpose of the BSSP will be to determine the future requirements matching needs to provision and commissioning new provision if required, in order to meet the needs of young people presenting with social, emotional and mental health (SEMH) issues.

Key work that has been identified relates to the continuum of provision which is available for children who present with SEMH issues. It is recognised that the current provision has significant pressures related to a lack of specialist places.

The continuum of provision includes:  
(number of current places in brackets)

- School based behaviour support programmes
- Behaviour and Achievement Collaboratives (BACs)
  - Central
  - South
  - Three Valleys  
including managed moves between schools
- Day 6 provision at The Junction (for those excluded from school for 6 days or more)
- School based commissioned alternative provision for KS4 pupils
- LA support through the Behaviour Support Service including the specialist teaching service
- School based Primary Behaviour Centres
  - Acorn (10) Horizons (10) Silver Birch (10) Phoenix (15)
- Park Primary Pupil Referral Unit (PRU) (42)
- Central KS3 PRU (Aireview and Jesse Street) (50)
- Ellar Carr KS3/4 PRU (45) \*
- District PRU (146) \*
- Oastler SEMH Special School (90)
- Out of District (varies)

Other areas that impact on this area include in-year admissions, including Fair Access, and the level of in-year turbulence.

#### Key Workstreams will include:

##### 1 Early Years

The 0-7 Early Years Integrated Pathway will be considered to ensure that we have sufficient support for children with SEMH particularly in the Early Years.

We also need to consider the way placements are funded. We want to ensure value for money but we also want to establish a stable, secure and highly skilled workforce. Our children deserve the best teachers and continuity of provision which should be able to respond flexibly to the needs of the District.

## **2 KS1/2**

We currently have 87 places for primary aged children with SEMH.

An initial analysis of children placed at Park Primary PRU indicates that many of the children remain on roll and do not return to a primary school due the level of SEMH needs. A significant number of these children have a Statement of SEN or Education and Health Care Plan (EHCP).

A review of this area is required to establish whether we have sufficient places to meet the needs of the children with SEMH in the District and whether the needs of the children are being met in the correct type of placement. Based on this needs analysis, does the District require a Primary SEMH Special School and does our current provision for children with SEMH meet the needs of the children and are there sufficient places?.

This task and finish group will consider the existing range model for SEMH and use this to inform future plans.

We also need to consider the way placements are funded. We want to ensure value for money but we also want to establish a stable, secure and highly skilled workforce. Our children deserve the best teachers and continuity of provision which should be able to respond flexibly to the needs of the District.

## **3 KS3/4 provision**

We currently have 370 places for secondary aged pupils, this includes the places identified above and includes a number of out of authority placements.

An initial analysis of children placed at Ellar Carr (KS3/4) PRU indicates that many of the children remain on roll and do not return to a secondary school due the level of SEMH needs, some transfer to District PRU and others to Oastler. A significant number of these children have Statement of SEN or Education and Health care Plan (EHCP). Some children remain until they are of school leaving age.

Central PRU provides a short term 8 week placement with an expected return to mainstream school. Does this provision meet the needs of KS3 pupils? Does it need to provide 1 and 2 term placements with a return to mainstream school? Does it have sufficient places? What is the interface between primary aged provision and KS4 provision?

A review of this area is required to establish whether we have sufficient places to meet the needs of the children with SEMH in the District and whether the needs of the children are being met in the correct type of placement.

Based on this needs analysis does the District require an additional SEMH Secondary Special School, does our current provision for children with SEMH, meet the needs of the children and are there sufficient places. It is already acknowledged that we have insufficient KS4 places at District PRU. They are already close to capacity in term 1 of the current academic year.

We also need to consider post 16 provision.

This task and finish group will consider the existing range model for SEMH and use this to inform future plans.

We also need to consider the way placements are funded. We want to ensure value for money but we also want to establish a stable, secure and highly skilled workforce. Our

children deserve the best teachers and continuity of provision which should be able to respond flexibly to the needs of the District.

#### **4 Alternative provision**

An analysis of current providers used by schools and the PRUS will be carried out. This will include revisiting the existing Alternative Providers Framework. We need to ensure that we have sufficient providers and that they match the needs of the young people and that we have robust quality assurance processes in place.

#### **5 Fair Access**

Current policy and process will be reviewed. A Fair Access Officer will be established and a Fair Access Panel will be convened on a regular basis. This work needs to consider its relationship to the existing BACs process, the development of the Centres of Good Practice for EAL and proposed development of a Virtual School for Vulnerable Children.

#### **6 In year Admissions**

Bradford has a significant in-year admissions challenge of approximately 7000 per year. Many of these admissions are due to families moving in to Bradford some of whom are new to the UK. Some families arrive at a time when national examination programmes of study are underway for example year 6 and year 10 and 11. Together with schools we need to ensure that admissions are done as quickly as possible and that we can ensure the best outcomes for the children and young people

#### **7 Transitions**

This group will review current transition processes related to children with SEND including those with SEMH to ensure a smooth transition between schools. This will include meetings between key staff and parents and or carers. Records will be exchanged and staff in the receiving school being made aware of a child's needs.

#### **8 Timeline**

Establish Behaviour Strategy Strategic Partnership Group - 7 December 2015

Establish Task and Finish Groups all to have presented their findings and recommendations by Easter 2015:

Early Years

KS1/2

KS3/4

Post 16

Alternative Providers

Fair Access

In-Year Admissions

Transitions

## SCHOOLS FORUM AGENDA ITEM

For Action

For Information



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

**This report provides Forum members with updated indicative modelling of Primary and Secondary delegated budgets for 2016/17, using the pupil numbers taken from the October 2015 Census. This is tabled for information at this stage, prior to asking members to make final recommendations in the meeting to be held on 6 January 2016.**

**This report also further considers the possible implications of a National Fair Funding Formula.**

### **Date(s) of any Previous Discussion at the Forum**

The outcomes of the consultation on Primary and Secondary funding arrangements for 2016/17 were discussed, and the indicative pro-forma detailing the structure of the 2016/17 Primary and Secondary funding formulae was approved, at the last Forum meeting held on 21 October 2015.

### **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).

The Government has then set out further changes to funding arrangements since 2013/14, with the aim that these minor changes would continue progress towards a national fair funding formula.

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.

Following discussion of the outcomes of the consultation on primary and secondary formula funding at the last meeting, the Indicative Primary and Secondary Pro-forma for 2016/17 was agreed and submitted to the Education Funding Agency (EFA) before the deadline of 30 October 2015, and we have since received written notification that this has passed the EFA's compliance and reasonableness checks. At the last meeting, the Forum also agreed the criteria for the allocation of primary and secondary 'contingency' funds, including the Growth Fund, for 2016/17. Concerns were also raised regarding the low response rate to the consultation it was suggested that both the Authority and Forum members should consider how the two-way communication between the Schools Forum and schools / academies could be improved; members are asked to discuss this further under Matters Arising. Members also received a report from the Formula Funding Working Group (FFWG) on matters relating to the values of factors within the primary and secondary funding formulae, in particular how the values of the Bradford Districts funding formulae compare with national averages.

The Government published a joint [Spending Review and Autumn Statement for 2015](#) on 25 November 2015. The publication confirms that a National Fair Funding Formula for all of the DSG blocks will be implemented from 2017/18 and we expect consultation to start in the spring.

### **Details of the Item for Consideration**

At the meeting on 23 September 2015, Forum members considered the likely allocations in formula funding for individual schools and academies in 2016/17. This early modelling was based on maintaining a 'cash flat' position overall and using our own estimate of October 2015 pupil numbers on roll. We stated that this modelling would be updated for the December meeting, as was the case last year, using actual October 2015 Census numbers. Please note that the October 2015 Census data for a small number of academies is not yet available to the Authority, and so pupil numbers for these academies are still as estimated in the September modelling.

### **Details of the Item for Consideration**

The modelling, shown in Appendices 1 and 2, provides members with an updated view of Primary and Secondary school and academy budgets in 2016/17, using the pupil numbers taken from the October 2015 Census. However, the indicative allocations for individual schools and academies have not yet been updated for other data changes (e.g. Ever 6 FSM %, IDACI, EAL, etc.) as the October 2015 Census Dataset will not be made available by the EFA until later in December. For clarity, the 2 key differences from the modelling presented at the September meeting are:

- Pupil numbers have been updated from our estimate of October 2015 Census numbers used in September to the latest version of the actual October 2015 Census pupil numbers for Reception to Year 11. Final checking of the October 2015 Census data is currently underway by the DfE so there may be some further changes to the final pupil numbers provided in the dataset.
- Pupil Premium allocations are still based on the Ever 6 FSM % data that was used to calculate the final Pupil Premium allocations for 2015/16; this Ever 6 FSM % has been multiplied by the October 2015 Census numbers on roll to give an estimate for 2016/17.

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

As the modelling is currently based on maintaining factor values at 2015/16 levels, there are 2 main factors behind the variances shown for individual schools and academies:

- Changes in pupil numbers between the October 2014 and October 2015 Censuses
- Reductions in the values of Minimum Funding Guarantee (MFG) protections, or Transitional Ceiling contributions, as the MFG, set at minus 1.5%, allows for further reductions in funding for schools and academies currently on the MFG. As the total cost of the MFG decreases, the value of ceiling required also reduces.

There are other factors that will influence the variances for individual schools and academies that are either not yet available or not yet decided so are not yet built into the modelling:

- Changes in individual setting data, such as Ever 6 FSM, EAL, SEN attainment, as recorded in the October 2015 Census. For example, a school or academy that has an increase in its Ever 6 FSM % in October 2015, compared against October 2014, would see an increase in funding per pupil in 2016/17 (all other aspects remaining the same). It is very likely, however, that factor values will have to be reduced so that any increases in pupil data are cost neutral. The October 2015 Census Dataset will be made available on 10 December 2015.
- Changes in the levels of de-delegated / centrally managed funds that may be recommended by Forum members. For example, reductions in these funds will increase delegated budgets, but any costs associated with replacing services that can no longer be accessed will also fall to delegated budgets.
- The overall affordability position of the DSG in 2016/17; it is likely that factor values will be reduced in order to afford cost pressures in the overall DSG, and to deal with any increase in formula funding data recorded in the October 2015 Census Dataset. Please see update from the FFWG section below and Document FN for further information.
- Pupil Premium allocations will be based on January 2016 Census pupil numbers and so will be estimated only in the budget modelling (and in Section 251 Budgets).

Appendices 1 and 2 are provided for information at this stage, prior to asking members to make final recommendations on the values of funding allocated via each factor on 6 January 2016. At this meeting, the indicative allocations for schools and academies will be updated using the final October 2015 Census Dataset. Members will then be asked to make recommendations on our Final Pro-forma, which must be submitted to the EFA by 21 January 2016.

### **Update from the Formula Funding Working Group**

The Formula Funding Working Group (FFWG) met on 30 November 2015 to consider the possible implications of a National Fair Funding Formula (NFFF) for schools in the Bradford District. The group discussed many aspects of the future funding position for schools and academies, including the following:

- **Summary of key points from the 2015 Spending Review**
  - A NFFF will be introduced from 2017/18, and will include the Early Years, Schools and High Needs Blocks of the DSG. There will be a period of transitional protection for settings that lose as a result of formula change, but there is currently no information on the level of protection. We are expecting further details to be announced and a consultation process to take place early in 2016. Although we predict that a national formula may not likely to be favourable for Bradford schools, the announcement on 25 November does not give us sufficient information to carry out individual school modelling on what a NFFF may look like.
  - The Pupil Premium Grant will be protected at current rates for the rest of the Parliament.
  - Funding for Universal Infant Free School Meals will be maintained. Average childcare funding rates will be increased from 2017/18 alongside the extension to 30 hours for eligible working parents. An Early Years National Funding Formula (EYNFF) will be introduced from April 2017.

### Details of the Item for Consideration

- The 16-19 base funding rate is protected in cash terms in 2016/17, but other non-base rate funding is expected to be reduced e.g. the deprivation funding in the post-16 funding formula.
- There continues to be a focus on efficiency and procurement; the DfE will be providing detailed actions and guidance in 2016 to support schools to make savings, including using economies of scale. The FFWG discussed the formation of Multi-Academy Trusts (MATs) as a way of using economies of scale and providing more flexibility to target funds where they are most needed.
- Savings of around £600 million will be made on the Education Services Grant (ESG), which is paid to Authorities and to academies (to represent the average cost of services that local authorities provide centrally to maintained schools). This represents a reduction of around 75%.
- DSG Guaranteed Unit of Funding (GUF) Analysis
  - The F40 Group's modelling suggests that, under a NFFF, the Bradford District's Schools Block per pupil funding would be £175 lower than currently.
  - The FFWG considered modelling based on 2012/13 DSG funding rates (as this was the final year of receiving a single DSG GUF, prior to the DSG being split into the three blocks) and on January 2015 statistics. This modelling shows that we have the 17<sup>th</sup> highest DSG funding rate, excluding inner London authorities. In comparison, we have the 18<sup>th</sup> highest FSM %, and the 5<sup>th</sup> highest EAL %, which suggests that our ranking of 17<sup>th</sup> highest in DSG funding rates is not unreasonable.
  - The F40 model only looks at Schools Block funding and does not take into consideration how different Authorities have split the DSG into the three blocks. It is clear, from the modelling presented in Document FK Appendix 1 in the October meeting, and from national benchmarking of the total values of the Schools Block and the High Needs Block, that we have chosen to fund a level of additional need from the Schools Block, where, in other local authorities, the High Needs Block may be funding this level of additional need.
  - The Schools Block GUF, therefore, cannot be considered in isolation; all three of the blocks of the DSG need to be taken into account when looking at a NFFF. As such, the £175 loss figure from the F40 Group's modelling must be considered in this context.
- The impact on individual schools of reducing the factor variables
  - As presented in Document FN, there is currently an estimated affordability gap of £2.77 million in the 2016/17 DSG. If the final position, which will be confirmed in the meeting to be held on 6 January 2016, is as estimated, then the Forum will need to make recommendations on reducing spending in order to balance the 2016/17 DSG. This is likely to include reductions to formula factor values across all 3 DSG blocks.
  - The FFWG considered three models of reducing factor values in the Schools Block:
    - A. Model A reduced all of the pupil-led factors by 1%, including core funding and funding for additionality. This resulted in reductions of between £25 and £46 per pupil for primary, and between £44 and £68 per pupil for secondary.
    - B. Model B reduced the Base Amount Per Pupil by 0.5% and the AEN factors by 3%. This resulted in reductions of between £16 and £67 per pupil for primary, and between £25 and £96 per pupil for secondary.
    - C. Model C reduced only the AEN factors by 6%, so the Base Amount Per Pupil was maintained at the same value as in 2015/16. This resulted in reductions of between £5 and £106 per pupil for primary, and between £10 and £149 per pupil for secondary.
  - After consideration of the overall distribution of variances for each phase, the steer given by the FFWG members was that, where an affordability reduction is needed, this should be used the Model A methodology; to reduce all of the pupil-led factors (including the Base Amount Per Pupil) by the same percentage, indicatively set at 1%. The FFWG took the view that a flat topslice would provide for the least re-distribution and would be the fairest way to reduce formula funding allocations (rather than choosing to reduce a specific type of factor, which would target greater reductions at a smaller number of schools).
  - This is the same principle that is recommended to be applied to reductions in Top Up rates in the High Needs Block (see document FO). Applying the same principle to the Early Years Block will mean reducing both the base setting rates and the deprivation rates by a flat %.

### Information on Post-16 Funding

- Post-16 funding has decreased significantly in recent years and the protections put in place for previous funding changes will all have ceased by the end of the 2015/16 academic year. The transitional protection ceased at the end of the last academic year and the formula protection funding will cease at the end of the current academic year. Indicative data from the October 2015 Census suggests that the numbers of students in total in secondary sixth forms has reduced, which will also mean a reduction in funding for individual schools.
- The Authority is currently conducting a review of post-16 provision across the District. The review is due to conclude in February 2016 and will be used to inform the post-16 area review. Further information will be provided as the review progresses.
- The Government has confirmed that the base funding rate is protected in cash terms in 2016/17, but other non-base rate funding is expected to be reduced. A reduction in the deprivation element of funding would have quite a significant impact on Bradford's sixth forms.

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

The available DSG for Primary and Secondary schools and academies, or the Schools Block, will be confirmed in the week commencing 14 December 2015. This will be based on the outcomes of the October 2015 Census that schools and academies submitted on 1 October 2015.

**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 Forum is asked to note the Primary and Secondary indicative modelling at this stage. The modelling will be updated using the final October 2015 Census Dataset once it is made available by the DfE, and a further update will be provided in the meeting to be held on 6 January, when Forum Members will be asked to make final recommendations on the values of funding allocated via each of the formulae factors. It is likely that Forum Members will need to consider the reduction of formula funding variables to meet overall DSG affordability pressures.**

**Members are asked to consider whether sufficient information has been provided to enable final recommendations to be taken on 6 January 2016 on the matters presented in this report.**

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

- Appendix 1 - Indicative Variances Analysis 2016/17 - Individual Primary School / Academy Modelling
- Appendix 2 - Indicative Variances Analysis 2016/17 - Individual Secondary School / Academy Modelling

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

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		2015/16 Actuals				2016/17 Estimated - see notes below				Variances				Adjustments		Formula Funding & Cont (Inc. MFG & Ceiling)					2016/17 No.s
Phase	School	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	Reception Uplift	
PRIMARY	Addingham Primary School	799,998	631	22,120	822,749	790,409	631	22,192	813,232	-9,588	0	72	-9,517	466	0	3,906	3,859	-47	0	205	
PRIMARY	Aire View Infant School	947,920	12,071	43,080	1,003,071	967,525	30,848	44,004	1,042,377	19,605	18,777	924	39,306	31,910	0	4,017	4,042	25	8	247	
PRIMARY	All Saints' CE Primary School (Bradford)	2,487,466	38,895	293,040	2,819,401	2,644,416	34,871	306,848	2,986,135	156,950	-4,024	13,808	166,734	0	0	4,464	4,436	-28	38	604	
PRIMARY	All Saints' CE Primary School (Ilkley)	1,132,903	0	42,760	1,175,663	1,147,744	0	42,539	1,190,283	14,841	0	-221	14,620	0	0	3,563	3,564	2	4	322	
PRIMARY	Allerton Primary School	1,767,274	0	232,760	2,000,034	1,758,055	0	231,675	1,989,730	-9,219	0	-1,085	-10,304	0	0	4,178	4,196	18	-4	419	
RECOUPMENT ACADEMY	Appleton Academy	1,415,667	0	225,720	1,641,387	1,526,915	0	243,460	1,770,374	111,247	0	17,740	128,987	0	0	3,826	3,827	1	29	399	
PRIMARY	Ashlands Primary School	1,487,127	74,284	63,940	1,625,351	1,556,242	51,655	67,129	1,675,026	69,115	-22,629	3,189	49,675	0	0	3,640	3,565	-74	22	451	
PRIMARY	Atlas Community Primary School	1,029,716	0	116,160	1,145,876	1,017,487	0	114,508	1,131,995	-12,230	0	-1,652	-13,881	0	0	4,880	4,892	12	-3	208	
PRIMARY	Baildon CE Primary School	1,449,035	1,024	44,740	1,494,799	1,444,595	1,024	45,151	1,490,770	-4,440	0	411	-4,028	18,273	0	3,528	3,483	-45	4	415	
PRIMARY	Bankfoot Primary School	1,196,374	0	113,520	1,309,894	1,183,462	0	111,025	1,294,487	-12,912	0	-2,495	-15,407	0	-9,915	4,335	4,432	98	-9	267	
PRIMARY	Barkerend Primary School	1,898,863	0	237,600	2,136,463	1,897,253	0	235,348	2,132,600	-1,610	0	-2,252	-3,862	0	0	4,521	4,528	7	-1	419	
PRIMARY	Ben Rhydding Primary School	835,361	2,048	24,760	862,168	811,080	2,048	24,055	837,182	-24,281	0	-705	-24,986	0	0	3,824	3,872	48	-9	210	
PRIMARY	Blakehill Primary School	1,539,184	5,500	108,660	1,653,344	1,539,339	5,500	108,904	1,653,743	155	0	244	399	0	0	3,643	3,652	9	-1	423	
PRIMARY	Bowling Park Primary School	2,852,856	0	406,820	3,259,676	2,890,145	0	423,428	3,313,573	37,289	0	16,608	53,897	0	0	4,458	4,460	3	8	648	
PRIMARY	Brackenhill Primary School	1,707,656	38,895	216,480	1,963,032	1,828,494	0	234,140	2,062,634	120,838	-38,895	17,660	99,603	0	0	4,560	4,427	-133	30	413	
RECOUPMENT ACADEMY	Bradford Academy	1,334,273	0	143,880	1,478,153	1,565,016	0	170,974	1,735,990	230,743	0	27,094	257,837	0	0	3,901	3,903	1	59	401	
RECOUPMENT FREE SCH	Bradford Girls Grammar (Free School)	1,191,638	0	65,340	1,256,978	1,172,494	0	65,146	1,237,639	-19,145	0	-194	-19,339	0	0	3,500	3,500	0	-6	335	
PRIMARY	Burley & Woodhead CE Primary School	830,436	0	21,100	851,536	820,277	0	21,039	841,316	-10,159	0	-61	-10,220	0	0	3,775	3,798	23	-4	216	
PRIMARY	Burley Oaks Primary School	1,445,617	35,944	50,580	1,532,141	1,469,799	17,167	51,644	1,538,610	24,182	-18,777	1,064	6,469	0	0	3,528	3,442	-85	12	432	
PRIMARY	Byron Primary School	2,764,465	1,400	286,440	3,052,305	2,675,811	0	278,295	2,954,106	-88,653	-1,400	-8,145	-98,199	0	0	4,328	4,351	22	-24	615	
PRIMARY	Carrwood Primary School	1,587,020	44,966	289,680	1,921,666	1,791,710	20,824	313,168	2,125,703	204,691	-24,142	23,488	204,037	0	0	5,422	5,254	-168	44	345	
PRIMARY	Cavendish Primary School	1,806,185	26,436	284,100	2,116,721	1,839,868	9,941	290,026	2,139,835	33,683	-16,495	5,926	23,114	0	-19,818	4,213	4,204	-9	5	440	
RECOUPMENT ACADEMY	Christ Church Primary Academy	946,640	0	128,040	1,074,680	899,921	0	133,075	1,032,996	-46,719	0	5,035	-41,684	0	0	4,805	4,864	59	-12	185	
PRIMARY	Clayton CE Primary School	1,532,958	2,048	134,640	1,669,645	1,549,172	0	135,616	1,684,788	16,214	-2,048	976	15,142	0	0	3,717	3,715	-2	4	417	
PRIMARY	Clayton Village Primary School	919,611	0	108,820	1,028,431	916,151	0	108,820	1,024,971	-3,460	0	0	-3,460	0	-178	4,530	4,604	74	-4	199	
PRIMARY	Cotthorne Primary School	1,832,410	0	155,760	1,988,170	1,799,190	0	154,671	1,953,861	-33,220	0	-1,089	-34,309	0	0	4,203	4,223	21	-10	426	
PRIMARY	Cottingley Village Primary School	1,546,666	0	147,380	1,694,046	1,546,214	0	146,399	1,692,614	-452	0	-981	-1,433	0	0	3,700	3,708	8	-1	417	
PRIMARY	Crossflatts Primary School	1,462,142	27,667	70,840	1,560,649	1,467,341	6,992	70,987	1,545,319	5,199	-20,675	147	-15,329	0	0	3,573	3,527	-46	1	418	
PRIMARY	Crossley Hall Primary School	2,363,966	26,824	281,740	2,672,530	2,458,418	0	291,960	2,750,378	94,452	-26,824	10,220	77,848	0	0	4,180	4,125	-55	24	596	
PRIMARY	Cullingworth Village Primary School	909,540	10,730	63,200	983,470	943,775	24,142	65,293	1,033,210	34,234	13,412	2,093	49,740	0	0	4,090	4,119	29	10	235	
PRIMARY	Denholme Primary School	811,455	0	95,620	907,075	825,931	0	96,084	922,015	14,476	0	464	14,940	0	0	4,248	4,236	-13	4	195	
RECOUPMENT ACADEMY	Dixons Allerton Academy	604,031	110,415	26,400	740,846	841,359	85,415	39,489	966,263	237,328	-25,000	13,089	225,418	0	0	4,639	4,311	-329	61	215	
RECOUPMENT ACADEMY	Dixons Marchbank Academy	1,933,992	0	288,180	2,222,172	1,948,135	0	290,858	2,238,992	14,142	0	2,678	16,820	0	-13,577	4,540	4,573	33	0	426	
RECOUPMENT FREE SCH	Dixons Music Primary	846,228	0	34,320	880,548	1,051,836	0	47,910	1,099,746	205,607	0	13,590	219,197	5,917	0	4,550	4,329	-221	57	243	
PRIMARY	East Morton CE Primary School	813,396	0	29,880	843,276	805,661	0	29,618	835,279	-7,735	0	-262	-7,997	0	0	3,837	3,855	18	-3	209	
PRIMARY	Eastburn Junior and Infant School	788,766	0	29,920	818,686	796,468	0	30,480	826,948	7,702	0	560	8,262	0	0	3,944	3,943	-1	2	202	
PRIMARY	Eastwood Primary School	1,768,561	0	204,600	1,973,161	1,765,841	0	206,656	1,972,497	-2,720	0	2,056	-664	0	0	4,378	4,360	-18	1	405	
PRIMARY	Eldwick Primary School	1,508,797	26,888	31,520	1,567,206	1,550,017	24,206	32,208	1,606,431	41,219	-2,682	688	39,225	0	0	3,474	3,460	-15	13	455	
PRIMARY	Fagley Primary School	1,049,977	26,102	143,160	1,219,238	1,046,088	9,199	143,160	1,198,447	-3,889	-16,902	0	-20,791	0	-14,595	5,076	5,073	-2	-4	208	
PRIMARY	Farfield Primary	1,727,401	0	310,620	2,038,021	1,814,177	0	317,657	2,131,833	86,776	0	7,037	93,812	0	0	4,534	4,513	-21	21	402	
PRIMARY	Farnham Primary School	1,843,614	13,533	191,400	2,048,547	1,841,771	2,048	190,065	2,033,883	-1,844	-11,485	-1,335	-14,664	0	0	4,359	4,318	-41	1	427	
PRIMARY	Fearnville Primary School	1,639,900	0	280,140	1,920,040	1,714,000	0	292,272	2,006,272	74,100	0	12,132	86,232	0	0	4,767	4,748	-19	17	361	
RECOUPMENT ACADEMY	Feversham Primary Academy	1,837,051	0	167,640	2,004,691	1,830,745	0	164,806	1,995,550	-6,306	0	-2,834	-9,140	0	0	4,481	4,498	18	-3	407	
PRIMARY	Foxhill Primary School	799,928	29,087	39,160	868,175	824,683	12,120	40,791	877,593	24,755	-16,967	1,631	9,418	0	0	4,044	3,929	-115	8	213	
PRIMARY	Frizinghall Primary School	1,706,904	0	179,520	1,886,424	1,697,752	0	181,775	1,879,528	-9,152	0	2,255	-6,897	0	0	4,235	4,213	-23	0	403	
PRIMARY	Girlington Primary School	1,787,992	0	200,640	1,988,632	1,804,871	0	200,169	2,005,040	16,879	0	-471	16,408	0	0	4,420	4,424	3	4	408	
PRIMARY	Glenaire Primary School	911,299	0	118,480	1,029,779	927,361	0	120,731	1,048,093	16,062	0	2,251	18,314	0	0	4,626	4,614	-12	4	201	
PRIMARY	Green Lane Primary School	2,726,970	18,812	283,800	3,029,582	2,711,671	18,812	286,130	3,016,612	-15,299	0	2,330	-12,969	90,956	0	4,561	4,521	-40	2	604	
PRIMARY	Greengates Primary School	919,482	0	88,700	1,008,182	917,264	0	88,321	1,005,585	-2,218	0	-379	-2,597	0	-1,623	4,358	4,410	52	-3	208	
PRIMARY	Grove House Primary School	1,596,669	0	141,240	1,737,909	1,600,560	0	140,903	1,741,463	3,892	0	-337	3,555	0	-340	3,904	3,942	38	-3	406	
RECOUPMENT ACADEMY	Harden Primary Academy	810,136	0	34,300	844,436	810,355	0	34,300	844,655	219	0	0	219	0	0	3,895	3,896	1	0	208	
PRIMARY	Haworth Primary School	867,624	40,573	67,180	975,377	913,059	13,412	71,630	998,102	45,435	-27,161	4,450	22,725	0	0	4,185	4,011	-175	14	231	
PRIMARY	Heaton Primary School	2,700,972	0	363,000	3,063,972	2,667,457	0	360,721	3,028,178	-33,515	0	-2,279	-35,794	0	0	4,201	4,214	13	-10	633	
PRIMARY	Heaton St Barnabas' CE Primary School	1,668,465	0	150,480	1,818,945	1,675,256	0	149,360	1,824,616	6,791	0	-1,120	5,671	0	0	4,156	4,188	33	-2	400	
PRIMARY	High Craggs Primary School	1,686,024	43,088	267,040	1,996,152	1,683,710	19,171	270,298	1,973,179	-2,314	-23,916	3,258	-22,973	0	0	4,456	4,389	-68	0	388	
PRIMARY	Hill Top CE Primary School	837,990	0	61,720	899,710	848,060	0	62,512	910,572	10,071	0	792	10,863	0	0	4,088	4,077	-11	3	208	
PRIMARY	Hollingwood Primary School	1,668,689	2,048	164,580	1,835,317	1,655,743	2,048	164,191	1,821,982	-12,947	0	-389	-13,335	0	0	3,940	3,947	7	-4	420	
PRIMARY	Holybrook Primary School	1,092,996	3,168	187,440	1,283,604	1,098,874															

		2015/16 Actuals				2016/17 Estimated - see notes below				Variances				Adjustments		Formula Funding & Cont (Inc. MFG & Ceiling)				2016/17 No.s (October 2015 Census + Reception Uplift)	
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 figures to the left)	Ceiling figures to the left)	2015/16 £app	2016/17 £app	£app Variance	Pupil Number Difference		
		Block	Safeguarded	Premium		Funding	Safeguarded	Premium		Funding	Safeguarded	Premium									
PRIMARY	Lidget Green Primary School	2,270,047	0	267,960	2,538,007	2,267,905	0	266,452	2,534,357	-2,142	0	-1,508	-3,650	0	0	4,267	4,255	-12	1		533
PRIMARY	Lilycroft Primary School	1,919,087	0	231,580	2,150,667	1,952,548	0	235,169	2,187,717	33,462	0	3,589	37,050	0	0	4,274	4,273	-2	8		457
PRIMARY	Lister Primary School	1,762,199	0	153,120	1,915,319	1,724,430	0	149,367	1,873,797	-37,769	0	-3,753	-41,522	0	0	4,298	4,322	24	-11		399
PRIMARY	Long Lee Primary School	1,275,817	40,236	94,020	1,410,074	1,355,786	36,213	100,463	1,492,462	79,969	-4,024	6,443	82,389	0	0	4,113	4,058	-54	23		343
PRIMARY	Low Ash Primary School	1,587,557	0	149,440	1,736,997	1,577,625	0	148,092	1,725,717	-9,932	0	-1,348	-11,280	0	0	3,789	3,802	13	-4		415
PRIMARY	Low Moor CE Primary School	1,556,271	0	133,260	1,689,531	1,542,035	0	131,572	1,673,608	-14,236	0	-1,688	-15,923	0	0	3,777	3,789	11	-5		407
PRIMARY	Lower Fields Primary School	1,813,609	3,987	255,060	2,072,657	1,837,521	3,987	260,792	2,102,301	23,912	0	5,732	29,644	0	0	4,499	4,502	3	5		409
PRIMARY	Margaret McMillan Primary School	2,344,301	25,483	220,440	2,590,224	2,426,060	37,554	229,575	2,693,189	81,759	12,071	9,135	102,965	0	0	4,232	4,248	16	20		580
PRIMARY	Marshfield Primary School	1,738,145	0	150,480	1,888,625	1,740,394	0	149,760	1,890,154	2,249	0	-720	1,529	0	0	4,178	4,184	5	0		416
PRIMARY	Menston Primary School	1,337,538	45,215	26,400	1,409,152	1,416,193	35,830	28,092	1,480,115	78,656	-9,385	1,692	70,963	0	0	3,601	3,482	-119	33		417
RECOUPMENT ACADEMY	Merlin Top Primary Academy	1,516,203	0	282,480	1,798,683	1,589,909	0	295,075	1,884,984	73,706	0	12,595	86,301	0	0	4,875	4,847	-28	17		328
PRIMARY	Miriam Lord Community Primary School	1,649,649	0	150,480	1,800,129	1,661,829	0	150,480	1,812,309	12,180	0	0	12,180	0	0	4,285	4,283	-2	3		388
PRIMARY	Myrtle Park Primary School	841,992	0	26,700	868,692	824,258	0	25,977	850,234	-17,734	0	-723	-18,457	0	0	3,845	3,870	25	-6		213
PRIMARY	Nessfield Primary School	1,595,046	0	124,080	1,719,126	1,609,360	0	123,187	1,732,548	14,315	0	-893	13,422	0	-3,534	3,853	3,887	35	0		414
PRIMARY	Newby Primary School	1,810,118	0	165,000	1,975,118	1,817,553	0	166,579	1,984,132	7,435	0	1,579	9,014	0	0	4,300	4,307	7	1		422
PRIMARY	Newhall Park Primary School	1,622,981	16,095	173,500	1,812,576	1,652,572	12,071	174,380	1,839,023	29,590	-4,024	880	26,447	0	0	4,246	4,236	-11	7		393
PRIMARY	Oakworth Primary School	1,448,149	0	81,980	1,530,129	1,427,756	0	80,130	1,507,887	-20,393	0	-1,850	-22,243	0	0	3,464	3,474	9	-7		411
PRIMARY	Oldfield Primary School	350,868	0	10,560	361,428	362,691	0	10,763	373,454	11,823	0	203	12,026	12,617	0	7,161	6,843	-317	4		53
PRIMARY	Our Lady & St Brendan's Catholic Primary School	870,069	0	128,620	998,689	896,845	0	128,011	1,024,856	26,776	0	-609	26,167	0	-69,178	4,329	4,333	4	6		207
RECOUPMENT ACADEMY	Our Lady of Victories Catholic Primary Academy	984,985	0	80,820	1,065,805	987,778	0	80,452	1,068,230	2,793	0	-368	2,425	0	-17,882	4,498	4,531	33	-1		218
PRIMARY	Oxenhope CE Primary School	791,191	0	30,940	822,131	786,343	0	31,082	817,425	-4,848	0	142	-4,706	647	0	3,804	3,817	13	-2		206
PRIMARY	Parkland Primary School	1,088,222	0	175,820	1,264,042	1,152,757	0	183,346	1,336,103	64,535	0	7,526	72,060	0	0	5,085	4,969	-116	18		232
PRIMARY	Parkwood Primary School	1,104,388	0	134,640	1,239,028	1,052,376	0	129,308	1,181,684	-52,012	0	-5,332	-57,344	74,045	0	5,440	5,425	-16	-9		194
PRIMARY	Peel Park Primary School	2,500,135	26,261	347,160	2,873,555	2,558,623	2,048	350,789	2,911,459	58,488	-24,213	3,629	37,904	0	0	4,432	4,392	-40	13		583
PRIMARY	Poplars Farm Primary School	895,436	0	64,680	960,116	923,369	0	65,293	988,662	27,932	0	613	28,545	0	-19,554	4,305	4,315	10	6		214
PRIMARY	Priestthorpe Primary School	817,952	0	70,680	888,632	782,664	0	66,152	848,817	-35,288	0	-4,528	-39,815	0	-12,057	4,110	4,163	53	-11		188
PRIMARY	Princeville Primary School and Children's Centre	2,364,538	41,578	260,040	2,666,156	2,427,835	24,142	270,171	2,722,149	63,297	-17,436	10,131	55,993	0	0	4,415	4,379	-36	15		560
RECOUPMENT FREE SCH	Rainbow Primary Free School	1,234,749	0	112,200	1,346,949	1,372,308	0	121,091	1,493,399	137,559	0	8,891	146,450	0	0	4,880	4,798	-82	33		286
PRIMARY	Reevy Hill Primary School	979,464	0	184,800	1,164,264	994,024	0	183,847	1,177,871	14,559	0	-953	13,607	0	0	5,128	5,124	-4	3		194
PRIMARY	Riddlesden St Mary's CE Primary	1,544,718	30,162	133,620	1,708,499	1,538,036	0	133,267	1,671,303	-6,682	-30,162	-353	-37,196	0	0	4,144	4,069	-76	-2		378
PRIMARY	Russell Hall Primary School	857,370	0	88,720	946,090	857,826	0	88,337	946,163	456	0	-383	73	0	0	4,102	4,104	2	0		209
RECOUPMENT ACADEMY	Ryecroft Primary Academy	1,358,442	34,508	223,080	1,616,030	1,522,130	50,583	254,033	1,826,776	163,688	16,075	30,983	210,746	0	-14,791	5,484	5,461	-23	34		288
PRIMARY	Saltaire Primary School	1,562,318	0	114,100	1,676,418	1,564,188	0	113,573	1,677,761	1,870	0	-527	1,343	0	0	3,685	3,689	4	0		424
PRIMARY	Sandal Primary School and Nursery	1,436,870	0	78,600	1,515,470	1,438,903	0	78,600	1,517,503	2,034	0	0	2,034	0	0	3,539	3,544	5	0		406
PRIMARY	Sandy Lane Primary School	1,266,645	0	108,240	1,374,885	1,281,072	0	109,641	1,390,714	14,428	0	1,401	15,829	0	-8,603	4,047	4,093	46	0		313
RECOUPMENT ACADEMY	Shibden Head Primary Academy	1,504,929	9,570	84,900	1,599,399	1,480,500	0	83,041	1,563,541	-24,429	-9,570	-1,859	-35,858	0	0	3,564	3,550	-13	-8		417
PRIMARY	Shipleigh CE Primary School	917,038	0	75,820	992,858	903,674	0	74,779	978,453	-13,365	0	-1,041	-14,406	0	0	4,285	4,303	18	-4		210
RECOUPMENT ACADEMY	Shirley Manor Primary Academy	883,848	0	120,120	1,003,968	924,434	0	124,146	1,048,580	40,586	0	4,026	44,613	0	0	4,993	4,943	-50	10		187
RECOUPMENT ACADEMY	Southmere Primary Academy	1,587,469	28,165	216,480	1,832,115	1,673,481	52,307	230,912	1,956,700	86,012	24,141	14,432	124,585	0	0	4,656	4,690	34	21		368
RECOUPMENT ACADEMY	Dixons Manningham Primary Academy	1,757,439	0	209,880	1,967,319	1,786,471	0	212,027	1,998,498	29,031	0	2,147	31,178	0	0	4,529	4,523	-7	7		395
RECOUPMENT ACADEMY	St Anne's Catholic Primary Academy	1,232,141	0	73,920	1,306,061	1,170,388	0	69,254	1,239,642	-61,753	0	-4,666	-66,419	0	-31,966	4,080	4,136	56	-19		283
PRIMARY	St Anthony's Catholic Primary School (Clayton)	866,162	0	71,700	937,862	879,911	0	71,700	951,611	13,749	0	0	13,749	0	0	4,184	4,170	-14	4		211
PRIMARY	St Anthony's Catholic Primary School (Shipleigh)	600,794	0	38,860	639,654	597,150	0	37,994	635,144	-3,644	0	-866	-4,510	0	0	4,731	4,777	47	-2		125
PRIMARY	St Clare's Catholic Primary School	762,967	14,753	87,120	864,840	884,937	5,365	98,141	988,443	121,970	-9,388	11,021	123,603	0	0	4,922	4,761	-161	29		187
PRIMARY	St Columba's Catholic Primary School	1,624,586	4,024	177,480	1,806,089	1,648,776	0	182,796	1,831,572	24,190	-4,024	5,316	25,483	0	0	4,390	4,373	-16	6		377
PRIMARY	St Cuthbert & the First Martyrs' Catholic Primary	890,459	0	43,400	933,859	879,781	0	42,295	922,076	-10,678	0	-1,105	-11,783	0	-20,879	4,161	4,209	48	-5		209
PRIMARY	St Francis' Catholic Primary School	831,073	0	60,820	891,893	837,879	0	60,363	898,242	6,806	0	-457	6,349	0	0	4,074	4,067	-7	2		206
PRIMARY	St James' Church Primary School	1,504,176	39,763	258,360	1,802,299	1,613,498	27,110	275,190	1,915,799	109,322	-12,653	16,830	113,500	0	0	4,840	4,755	-85	26		345
PRIMARY	St John The Evangelist Catholic Primary School	840,565	0	53,700	894,265	830,397	0	53,959	884,356	-10,167	0	259	-9,908	0	-21,874	4,003	4,051	48	-5		205
PRIMARY	St John's CE Primary School	1,733,781	0	190,980	1,924,761	1,743,149	0	190,529	1,933,677	9,367	0	-451	8,916	0	0	4,108	4,150	42	-2		420
PRIMARY	St Joseph's Catholic Primary School (Bingley)	789,848	34,674</																		

		2015/16 Actuals				2016/17 Estimated - see notes below				Variances				Adjustments		Formula Funding & Cont (Inc. MFG & Ceiling)				
Schools		Block	Growth Fund /	Pupil	Total 2015/16	Formula Funding (including MFG & Ceiling)	Growth Fund /	Pupil	Total 2016/17	Formula Funding (including MFG & Ceiling)	Growth Fund /	Pupil	Total	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	2016/17 No.s (October 2015 Census + Reception Uplift)
Phase	School	Formula Funding	Safeguarded Salaries	Premium (July 2015)	Actual	MFG & Ceiling	Salaries	Premium	Estimated	MFG & Ceiling	Salaries	Premium	Variances							
PRIMARY	Westminster CE Primary School	2,433,312	24,142	317,460	2,774,914	2,572,435	20,118	330,616	2,923,169	139,123	-4,024	13,156	148,255	0	-11,257	4,476	4,432	-45	36	585
RECOUPMENT ACADEMY	Whetley Primary Academy	2,712,442	0	352,440	3,064,882	2,608,834	0	346,556	2,955,390	-103,608	0	-5,884	-109,492	0	-2,318	4,382	4,392	10	-25	594
PRIMARY	Wibsey Primary School	2,405,392	0	289,180	2,694,572	2,409,248	0	290,951	2,700,200	3,857	0	1,771	5,628	0	0	3,836	3,843	6	0	627
PRIMARY	Wilsden Primary School	1,448,456	0	66,000	1,514,456	1,451,157	0	64,892	1,516,049	2,701	0	-1,108	1,593	0	0	3,524	3,531	7	0	411
PRIMARY	Woodlands CE Primary School	503,840	0	19,060	522,900	494,267	0	19,060	513,327	-9,573	0	0	-9,573	2,702	0	4,845	4,894	49	-3	101
RECOUPMENT ACADEMY	Woodside Academy	1,741,155	41,260	299,480	2,081,894	1,711,812	48,587	268,940	2,029,339	-29,342	7,327	-30,540	-52,555	2,726	0	4,642	4,608	-33	-2	382
PRIMARY	Worth Valley Primary School	886,329	0	129,940	1,016,269	923,456	0	133,364	1,056,820	37,127	0	3,424	40,551	0	0	4,843	4,785	-59	10	193
PRIMARY	Worthinghead Primary School	855,234	0	101,480	956,714	871,937	0	101,480	973,417	16,703	0	0	16,703	0	-1,748	4,363	4,404	40	2	198
PRIMARY	Wycliffe CE Primary School	1,026,471	54,603	96,780	1,177,854	1,132,157	63,992	106,103	1,302,252	105,686	9,388	9,323	124,397	0	0	4,324	4,257	-68	31	281
<b>PRIMARY TOTALS</b>		<b>227,175,787</b>	<b>1,684,030</b>	<b>23,616,360</b>	<b>252,476,177</b>	<b>230,496,248</b>	<b>1,278,088</b>	<b>23,952,886</b>	<b>255,727,222</b>	<b>3,320,461</b>	<b>-405,941</b>	<b>336,526</b>	<b>3,251,045</b>	<b>308,862</b>	<b>-416,187</b>	<b>4,237</b>	<b>4,231</b>	<b>-6</b>	<b>771</b>	<b>54,785</b>

**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 DiE

2016/17 Estimated figures are based on the October 2015 Census pupil numbers (with no changes in other Census data e.g. FSM% from October 2014 Dataset). The Census data for some academies has not yet been made available to the LA (we have used our own estimate of October 2015 pupil numbers in the modelling for these academies).

2016/17 Estimated Formula Funding figures are based on maintaining the same factor values in 2016/17 as in 2015/16 (cash flat). The figures do not take into account any possible reductions for overall affordability issues

Pupil Premium ESTIMATED allocations 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 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 Difference from 15/16 to 16/17	2016/17 Funded No.s (Estimate of October 2015)
RECOUPMENT ACADEMY	Appleton Academy	4,202,378	0	362,560	4,564,938	4,285,470	0	364,415	4,649,885	83,092	0	1,855	84,947	0	0	5,633	5,624	-9	16	762
RECOUPMENT ACADEMY	Beckfoot Academy	7,320,830	0	274,885	7,595,715	7,367,894	0	275,644	7,643,538	47,064	0	759	47,823	0	0	5,529	5,536	6	7	1,331
RECOUPMENT ACADEMY	Beckfoot Upper Heaton Academy	2,639,846	0	141,185	2,781,031	2,454,274	0	136,841	2,591,115	-185,572	0	-4,344	-189,917	148,312	0	6,666	6,493	-173	-18	378
RECOUPMENT ACADEMY	Belle Vue Girls' Academy	5,139,799	0	343,145	5,482,944	5,097,560	0	338,600	5,436,160	-42,240	0	-4,545	-46,785	0	0	5,698	5,702	4	-8	894
SECONDARY	Bingley Grammar School	7,193,849	2,048	295,425	7,491,321	7,208,524	2,048	293,850	7,504,421	14,675	0	-1,575	13,100	0	0	4,826	4,846	20	-3	1,488
RECOUPMENT ACADEMY	Bradford Academy	6,007,226	0	476,708	6,483,934	5,982,303	0	472,780	6,455,083	-24,923	0	-3,927	-28,850	0	0	5,683	5,687	3	-5	1,052
RECOUPMENT FREE SCH	Bradford Girls Grammar (Free School)	2,343,494	0	116,935	2,460,429	2,569,266	0	129,810	2,699,076	225,772	0	12,875	238,647	0	-919	5,620	5,585	-35	43	460
SECONDARY	Buttershaw Business & Enterprise College	7,844,556	0	552,683	8,397,238	7,873,870	0	546,937	8,420,807	29,314	0	-5,746	23,569	0	0	5,920	5,925	4	4	1,329
SECONDARY	Carlton Bolling College	7,155,468	0	588,415	7,743,883	7,022,209	0	575,555	7,597,763	-133,259	0	-12,860	-146,119	0	0	6,023	6,038	15	-25	1,163
RECOUPMENT ACADEMY	Dixons Allerton Academy	6,680,147	0	527,173	7,207,319	6,640,627	0	522,261	7,162,888	-39,520	0	-4,912	-44,431	0	0	5,710	5,681	-29	-1	1,169
RECOUPMENT ACADEMY	Dixons City Academy	4,462,926	0	254,710	4,717,636	4,462,926	0	254,434	4,717,360	4,520	0	-276	4,244	0	0	5,358	5,363	5	0	833
RECOUPMENT FREE SCH	Dixons McMillan Academy	1,072,894	0	41,140	1,114,034	1,636,143	0	81,552	1,717,695	563,250	0	40,412	603,662	0	0	6,050	5,655	-395	112	289
RECOUPMENT FREE SCH	Dixons Trinity Academy	2,272,954	0	126,345	2,399,299	2,873,857	0	165,341	3,039,198	600,903	0	38,996	639,899	0	0	5,649	5,588	-62	112	514
RECOUPMENT ACADEMY	Bradford Forster Academy	801,910	0	0	801,910	1,808,244	0	33,124	1,841,368	1,006,334	0	33,124	1,039,458	0	0	6,546	6,262	-284	166	289
RECOUPMENT ACADEMY	Feversham College	3,121,753	0	213,210	3,334,963	3,275,641	0	226,065	3,501,707	153,888	0	12,855	166,743	28,480	0	5,969	5,870	-99	35	558
RECOUPMENT ACADEMY	Grange Technology College	9,641,288	0	689,563	10,330,850	9,652,562	0	695,563	10,348,125	11,275	0	6,000	17,275	0	0	6,479	6,491	12	-1	1,487
SECONDARY	Hanson School	8,112,329	0	557,723	8,670,051	7,947,407	0	534,633	8,482,040	-164,921	0	-23,090	-188,011	0	-213,557	5,908	5,958	49	-39	1,334
RECOUPMENT ACADEMY	Ilkley Grammar School	5,517,706	0	121,180	5,638,886	5,562,546	0	121,015	5,683,561	44,840	0	-165	44,675	0	0	4,523	4,552	29	2	1,222
SECONDARY	Immanuel College	5,958,832	992	321,635	6,281,459	5,996,615	992	325,980	6,323,588	37,784	0	4,345	42,129	0	0	5,042	5,040	-2	8	1,190
RECOUPMENT FREE SCH	International Food & Travel Studio	266,543	0	3,273	269,815	89,169	0	689	89,858	-177,374	0	-2,584	-179,958	0	0	22,212	22,292	80	-8	4
RECOUPMENT FREE SCH	Dixons Kings Academy	4,569,961	0	288,280	4,858,241	4,980,258	0	364,993	5,345,251	410,297	0	76,713	487,010	0	0	5,614	5,602	-12	75	889
SECONDARY	Laisterdyke Business and Enterprise College	5,315,114	0	428,230	5,743,344	5,241,862	0	413,221	5,655,083	-73,252	0	-15,009	-88,261	0	0	5,945	5,950	5	-13	881
SECONDARY	Oakbank School	7,098,899	0	485,998	7,584,897	6,968,822	0	476,743	7,445,565	-130,077	0	-9,255	-139,332	0	0	5,216	5,216	0	-25	1,336
RECOUPMENT ACADEMY	Oasis Academy Lister Park	4,680,074	0	386,683	5,066,756	4,734,584	0	387,166	5,121,750	54,511	0	483	54,994	0	0	6,000	6,001	1	9	789
RECOUPMENT FREE SCH	One In A Million (Free School)	1,011,063	0	65,450	1,076,513	1,363,774	0	99,284	1,463,058	352,710	0	33,834	386,545	0	0	6,696	6,373	-323	63	214
SECONDARY	Parkside School	4,243,911	0	202,560	4,446,471	4,222,295	0	202,102	4,424,397	-21,617	0	-458	-22,074	0	0	4,861	4,864	3	-5	868
SECONDARY	Queensbury School	4,812,497	0	309,750	5,122,247	4,715,680	0	299,476	5,015,157	-96,817	0	-10,274	-107,091	0	-4,932	5,353	5,414	61	-28	871
RECOUPMENT ACADEMY	Samuel Lister Academy	3,581,591	0	292,188	3,873,778	3,571,680	0	287,342	3,859,022	-9,911	0	-4,846	-14,757	0	0	6,030	6,023	-7	-1	593
SECONDARY	St Bede's & St Joseph's Catholic College	8,823,225	0	462,420	9,285,645	8,595,194	0	443,149	9,038,343	-228,032	0	-19,271	-247,302	0	0	5,347	5,369	21	-49	1,601
SECONDARY	The Holy Family Catholic School	3,937,711	0	186,965	4,124,676	3,937,915	0	186,720	4,124,635	205	0	-245	-41	0	0	5,278	5,279	0	0	746
SECONDARY	Thornton Grammar School	6,725,428	0	467,243	7,192,670	6,481,468	0	448,686	6,930,154	-243,960	0	-18,556	-262,516	0	0	5,169	5,173	3	-48	1,253
SECONDARY	Titus Salt School	7,252,897	1,024	400,398	7,654,318	7,237,368	1,024	395,357	7,633,748	-15,529	0	-5,041	-20,570	0	0	5,936	5,967	31	-9	1,213
SECONDARY	Tong High School	8,165,572	0	727,725	8,893,297	7,713,774	0	678,617	8,392,391	-451,797	0	-49,108	-500,905	0	-72,187	6,460	6,521	60	-81	1,183
RECOUPMENT ACADEMY	University Academy Keighley	4,218,892	0	246,840	4,465,732	4,501,059	0	267,374	4,768,434	282,167	0	20,534	302,702	222,126	0	7,324	7,202	-123	49	625
<b>SECONDARY TOTALS</b>		<b>172,193,562</b>	<b>4,064</b>	<b>10,958,618</b>	<b>183,156,243</b>	<b>174,077,361</b>	<b>4,064</b>	<b>11,045,319</b>	<b>185,126,744</b>	<b>1,883,799</b>	<b>0</b>	<b>86,701</b>	<b>1,970,501</b>	<b>398,919</b>	<b>-291,594</b>	<b>5,651</b>	<b>5,650</b>	<b>0</b>	<b>334</b>	<b>30,808</b>

## 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 the October 2015 Census pupil numbers (with no changes in other Census data e.g. FSM% from October 2014 Dataset). The Census data for some academies has not yet been made available to the LA (we have used our own estimate of October 2015 pupil numbers in the modelling for these academies).

2016/17 Estimated Formula Funding figures are based on maintaining the same factor values in 2016/17 as in 2015/16 (cash flat). The figures do not take into account any possible reductions for overall affordability issues

Pupil Premium ESTIMATED allocations 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 or for the Summer Schools programme