

Central Bedfordshire  
Council  
Priory House  
Monks Walk  
Chicksands,  
Shefford SG17 5TQ



**please ask for** Martha Clampitt  
**direct line** 0300 300 4032  
**date** 12 October 2012

## NOTICE OF MEETING

### CENTRAL BEDFORDSHIRE SCHOOLS FORUM

Date & Time

**Monday, 22 October 2012 at 6.00 p.m.**

Venue at

**Council Chamber, Priory House, Monks Walk, Shefford**

Richard Carr  
**Chief Executive**

To: The Chairman and Members of the CENTRAL BEDFORDSHIRE SCHOOLS FORUM:

School Members:

Anne Bell, Headteacher, Willow Nursery School  
David Brandon-Bravo, Headteacher, Parkfields Middle School  
Paul Burrett, Headteacher, Studham CofE Lower School and Pre-School  
Shirley-Anne Crosbie, Headteacher, Glenwood Special School  
Angie Hardy, Headteacher, Clipstone Brook Lower School  
Richard Holland, Governor, Harlington Upper School  
Sue Howley MBE, Governor, Greenleas Lower School  
Sharon Ingham, Headteacher, Hadrian Lower School  
Jim Parker, Headteacher, Manshead Upper School  
Stephen Tikin, Governor, Linslade Lower School

Non School Members

Mr M Foster, GMB representative  
Caroll Leggatt, PVI Early Years Providers Representative  
J Reynolds, Church of England Diocesan Representative  
Robert Shore, Local Authority 14-19 partnership representative - UTC

Observer: Cllr M A G Versallion, Executive Member for Children's Services

Please note that there will be a pre-meeting starting **half an hour before** the Forum meeting to enable technical aspects of the reports to be discussed with officers before the Forum meeting begins.

# AGENDA

1. **Apologies for absence**

To receive apologies for absence and notification of substitute members.

2. **Minutes of the previous meeting and matters arising**

To approve the minutes of the meetings of the Central Bedfordshire Schools Forum held on 25 June 2012 and 3 September 2012 and to receive an update on any matters arising from these.

## Proposals

<b>Item</b>	<b>Subject</b>	<b>Page Nos.</b>
3.	<b>School Funding Reform: Arrangements for 2013/14</b>	* 7 - 26

To note the update on the Funding Consultation with Schools and propose the formula factors for distribution of the DSG for 2013/14.

## Information

<b>Item</b>	<b>Subject</b>	<b>Page Nos.</b>
4.	<b>Schools Forum Constitution and Terms of Reference</b>	* 27 - 34

To note a proposed change in the membership provision for the Schools Forum.

**CENTRAL BEDFORDSHIRE COUNCIL**

At a meeting of the **CENTRAL BEDFORDSHIRE SCHOOLS FORUM** held at Committee Room 2, Watling House, High Street North, Dunstable on Monday, 25 June 2012

**PRESENT**

School Members:	Anne Bell	Headteacher, Willow Nursery School
	David Brandon-Bravo	Headteacher, Parkfields Middle School
	Paul Burrett	Headteacher, Studham CofE Lower School and Pre-School
	Shirley-Anne Crosbie	Headteacher, Glenwood Special School
	James Davis	Governor, Leighton Middle School
	Angie Hardy	Headteacher, Clipstone Brook Lower School
	Richard Holland	Governor, Harlington Upper School
	Sue Howley MBE	Governor, Greenleas Lower School
	Sharon Ingham	Headteacher, Hadrian Lower School
	Jim Parker	Headteacher, Manshead Upper School
	John Street	Academy Middle School Representative
	Stephen Tiktin	Governor, Linslade Lower School
Non-School Members:	Mr M Foster	GMB representative
	Ian Greenley	Church of England Diocese Representative
	Caroll Leggatt	PVI Early Years Providers Representative
	Robert Shore	Local Authority 14-19 partnership representative - UTC
Observer:	Cllr M A G Versallion	Executive Member for Children's Services
Apologies for Absence:	Mrs E Grant	
	Bill Hamilton	
Officers in Attendance:	Mrs M Clampitt	Committee Services Officer
	Mrs S Dakin	Commissioning and Partnerships Manager / School Improvement Adviser
	Mr P Dudley	Assistant Director Children's Services (Learning & Strategic Commissioning)
	Ms D Hill	Senior Finance Manager - Children's Services
	Mrs H Redding	Head of Learning and School Support

**CBSF/12/50 Election of Chairman and Vice-Chairman 2012/13**

The Forum were invited to make nominations for the Chairman and Vice-Chairman of the Central Bedfordshire Schools Forum.

Richard Holland was the only candidate nominated and seconded. He was therefore appointed Chairman.

Jim Parker was the only candidate nominated and seconded. He was therefore appointed Vice-Chairman.

**RESOLVED**

- 1. that Richard Holland be elected Chairman of the Central Bedfordshire Schools Forum 2012/13.**
- 2. that Jim Parker be elected Vice-Chairman of the Central Bedfordshire Schools Forum 2012/13.**

**CBSF/12/51 Minutes of the previous meeting and matters arising**

**RESOLVED**

**that the minutes of the meeting of the Central Bedfordshire Schools Forum held on 5 March 2012 be confirmed and signed by the Chairman as a correct record.**

The Forum asked for clarification on 3 items:-

- support for vulnerable pupils in Key Stage 2 - clarification was sought of the timeframe and which schools would be involved.  
Officers confirmed that the project was from last year 2011/12 and would continue into 2012/13 and involved nine middle schools. It was noted that a report would be taken to the Council's Children's Services Management Team (CSMT) and the Assistant Director agreed to bring report to the Forum also.
- a request was made for details of the groups who met and when. Officers agreed to provide this information.
- did the School Asset Management Sub-group still meet? Officers confirmed that it still met and a report was scheduled on the Forward Programme for a future meeting.

**CBSF/12/52 Use of Dedicated Schools Grant (DSG) to support activities aimed at closing the gap for Ethnic Minority (EM) and English as an Additional Language (EAL) pupils**

The Forum considered a report which provided the feedback from the Headteachers and partners reference group of consideration of alternative models of distribution of the now discontinued Ethnic Minority Achievement Grant (EMAG) in 2012/13.

At the 5 March 2012 meeting, the Forum requested that alternative funding be sought for the EMAG (see minute ref CBSF/11/43).

The Headteacher and partners reference group requested that the funds be paid from the top-slice DSG for 2012/13 and that this would be reviewed as part of the Funding Reforms for 2013/14.

It was also noted that any surplus would be allocated to support groups and projects for vulnerable kids.

**RESOLVED**

**that the £118,104, to close the gap for EM and EAL pupils, be allocated as proposed (as per previous years) for 2012/13 only.**

**CBSF/12/53 Outline Forward Programme**

The Forum considered a report which provided an update on the likely programme for the next year and requested a technical funding sub-group be established.

The Forum noted that the programme would be flexible to take account of both national and local policy issues.

The Senior Finance Officer advised the Forum that the dates of two meetings would need to be altered to allow consultation on the Schools Funding Reform. The timescales for consultation ignored the six-week school holidays.

A technical funding sub-group would be established and include representatives for each level of schools including academies. There would be meetings in July. A report would be brought to the September Forum meeting, which would now be held on 3 September 2012. The change of date would allow for an additional meeting to be held on 22 October before submission of the consultation response. The November meeting would also be moved back to the 26 November.

The technical funding sub-group membership would be as follows:-

Stephen Tiktin - lower school rep  
Sue Howley MBE - lower school rep  
David Brandon Bravo - middle school rep  
Martin Foster - trade union rep  
Shirley Anne Crosbie - special needs rep  
John Street - academy middle rep  
Anne Bell – nursery  
Richard Holland – academy upper rep

## **RESOLVED**

- 1. the forward programme be noted;**
- 2. that a technical funding sub-group be established**

### **CBSF/12/54 Revision to the Scheme for Financing Schools**

The Forum received a report which detailed the directed revisions to the Scheme for Financing Schools.

The Forum noted that if the Local Authority wanted to make alterations to the Scheme for Financing Schools, the Local Authority would need to consult. However, if the Department for Education (DfE) issued directed revisions, no consultation would be required as Local Authorities must incorporate in or remove from, their schemes the specified wording.

On 19 March 2012, the DfE notified LAs that with immediate effect the following changes were required:-

- removal of requirement for schools to submit a Best Value Statement
- removal of all requirements relating to the Financial Management Standard in Schools (FMSiS)
- removal of requirements relating to payments of General Teaching Council (GTC) fees
- inclusion of the requirement on schools to achieve efficiencies and value for money, to optimise their resources
- inclusion of the requirements of the Schools Financial Value Standard
- inclusion of a fraud provision which requires schools to have a robust system of controls to safeguard themselves against fraudulent or improper use of public money and assets
- revisions have also been made to the scheme to take into account the DfE's amended Guide and Regulations to the Consistent Financial Reporting (CFR) Framework.

## **RESOLVED**

**that the amendments to the Central Bedfordshire Scheme for Financing Schools in line with the DfE's directed revisions, be noted.**

**CBSF/12/55 School Forum Budget**

The Forum considered a report which provided an update on the use of the Schools Forum Budget for end of year 2011/12 and to confirm the level for 2012/13. The Forum noted that the £284 balance for 2011/12 had been absorbed into the DSG as it was not allowed to be carried over to the next financial year due to its size.

The Forum agreed at its meeting on 5 March 2012 (see minute ref CBSF/11/46) that a budget of £3,000 of which £1,000 would be used to pay for our continuing membership in the F40 group.

The Forum asked for clarification to be provided as to why parent/governors who sat on the Children's Services Overview and Scrutiny Committee received payment for their time yet members of the Schools Forum did not. Officers agreed to find out the reason and provide it outside of the meeting to all members. It was felt that it was not right to receive payment for volunteering to sit on the panels or committees.

The Governors were thanked for their time.

**RESOLVED**

- 1. that the School Forum position statement as at March 2012 be noted**
- 2. that the School Forum spend to 31 March 2012 be noted.**

**CBSF/12/56 Schools Specific Contingency Budget**

The Forum received and considered a report which provided an update on the Schools Specific Contingency Budget for 2011/12 and to propose the level for 2012/13.

The Forum approved a budget for 2011/12 of £1,775,670. The 2011/12 budget was £500,000 for General Contingency, £1,000,000 in anticipation of the cost of redundancies in schools during 2011/12 and £275,670 for SEN Contingency.

The Forum considered the General Contingency to be set at £500,000 and the SEN Contingency be £275,670 for the 2012/13 financial year. The SEN contingency was

**RESOLVED**

- 1. that the School Contingency position statement as at March 2012 be noted;**
- 2. that the School Contingency spend to 31 March 2012 be noted;**

3. **that the 2012/13 General Contingency be set at £500,000 and SEN Contingency £275,670 be proposed.**

**CBSF/12/57 School Finance Update**

The Forum considered a report which provided an update on the Schools out-turn position and approach to Surplus Balances for 2011/12.

Central Bedfordshire had 112 schools (excluding Academies) in 2011/12.

The Forum, at its meeting held on 7 March 2011, had resolved that there would be no balance control mechanism from 2011/12 onwards (minute no. CBSF/10/122 refers).

The Forum noted that the 2011/12 Earmarked Reserves would not be known until after the CFR returns had been filed by schools. However it was agreed that the £1.2m distributed from School Contingency during the year and awaiting the outcome of the National Consultation and associated funding uncertainties had increased balances.

Six schools had an agreed licensed deficit with a value of £509,670, with no school exceeding their agreed limit. One Lower School held an unlicensed deficit.

The categorisation of schools in the risk register would be reported to the next meeting of the Forum in September 2012. It was noted that no Notice of Concern had been issued during 2011/12.

**RESOLVED**

**that the Schools out-turn position for 2011/12 be noted.**

**CBSF/12/58 Dedicated Schools Grant (DSG)**

The Forum considered a report which provided an update on the Dedicated Schools Grant (DSG) arrangements and the Funding Reform Consultation.

**Dedicated Schools Grant (DSG)**

The final DSG for 2012/13 is £174.210m. This is based on 37.333 (fte number of pupils at January 2012) multiplied by £4,658 (Guaranteed Unit of Funding (GUF)). The figure was based on 30 schools converting to Academy status as at May 2012 and \$465k LACSEG transfer.

The Forum noted that a further 22 schools are expected to convert to Academy status by the end of the financial year.



The unallocated DSG from 2011/12 of £26,878 had been transferred to the School Contingency for redistribution in 2012/13.

### **School Budgets 2012/13**

The Forum noted that the School budgets were distributed during the week ending 9 March 2012 ahead of the 19 March 2012 deadline.

The Forum were reminded that a link was on the Schools portal which detailed the calculation of the pupil premium using Ever6.

### **Consultation on School Funding Reform**

The DfE launched an eight-week consultation 'Next steps towards a fairer system' which ran between 26 March and 21 May 2012. Full details could be found on the DfE website: <http://www.education.gov.uk/>.

No additional funding would be available prior to the CSR in 2015. The 2013/14 settlement would be based on 2012/13.

The DSG would be split into three notional un-ringfenced blocks: Schools, Early Years and High Needs. The School Block would be delegated to schools with the following three exceptions:-

- Maintained schools agreed a service should be provided centrally
- Historic commitment
- Statutory function

Funding would be based on the October census except for Early Years which will be based on the January count.

### **School Blocks**

The Forum noted that there were currently 37 factors in the formula and that this would be reducing to 10 different factors with effect from April 2013 as follows:-

- Basic per-pupil entitlement – AWPU (single unit rate for Primary/Secondary, although the department are asking should a separate KS3 and KS4 be permitted)
- Deprivation (based on FSM and/or IDACI – a single rate or a form of banding)
- Looked After Children
- Low cost, high incidence SEN (prescribing Early Years Foundation Stage Profile for Primary and KS2 data for Secondary)
- English as an additional language (for only three years after entry into compulsory school system)
- Lump Sum (requesting a response on what the upper limit should be in the range £100 - £150k with the same lump sum applicable to Primary/Secondary)
- Split site (to encourage schools who adopt efficient solutions, such as merging and federating)

- Rates
- PFI contracts
- Only applicable to five LA's London fringe area

The formula to be submitted with EFA by October 2012. The response to the consultation had been attached to the agenda.

The Technical Sub Group (minute no. CBSF/12/53 refers) would be considering the funding options.

The DfE confirmed that it wanted to move to a National consistency for basic entitlement and had suggested a fixed range for the Primary and Secondary funding ratio (1 for Primary and 1.25 for Secondary). Restrictions would be considered from 2014/15 onwards.

The Minimum Funding Guarantee (MFG) would be simplified and continue at negative 1.5% for both 2013/14 and 2014/15. Schools Forums will need to determine as part of their formula modelling, whether and how to limit gains.

The Forum noted that Special Schools would no longer have a delegated budget on the same basis as Primary and Secondary.

The Early Years Block would continue to be estimated on January counts but the funding floor would be phased out entirely by 2014/15 whilst 2013/14 is a transition year reducing the protection to 85%.

### **Modelling**

The Forum noted that a sub group meeting had been held on 26 April 2012 to discuss the consultation response.

The Technical sub group will meet to determine the new formula and will report to early September meeting to update the Forum.

### **RESOLVED**

- 1. that the deployment of the 2012/13 Dedicated Schools Grant (DSG) be noted**
- 2. that the update on the School Funding Reform Consultation be noted**
- 3. that the creation of a Technical Funding sub group to work with LA officers following the outcome of the Consultation be agreed.**

(Note: The meeting commenced at 9.30 a.m. and concluded at 11.30 a.m.)

Chairman .....

Dated .....

**CENTRAL BEDFORDSHIRE COUNCIL**

At a meeting of the **CENTRAL BEDFORDSHIRE SCHOOLS FORUM** held at Committee Room 2, Watling House, High Street North, Dunstable on Monday, 3 September 2012

**PRESENT**

Richard Holland (Chairman)

School Members:	Anne Bell	Headteacher, Willow Nursery School
	David Brandon-Bravo	Headteacher, Parkfields Middle School
	Paul Burrett	Headteacher, Studham CofE Lower School and Pre-School
	Shirley-Anne Crosbie	Headteacher, Chiltern School
	James Davis	Governor, Leighton Middle School
	Richard Holland	Governor, Harlington Upper School
	Sharon Ingham	Headteacher, Hadrian Academy
	John Street	Academy Middle School Representative
	Stephen Tiktin	Governor, Linslade Lower School
Non-School Members:	Martin Foster	Trade Union representative
	Bill Hamilton	Roman Catholic Diocese representative
Observer:	Cllr Mark Versallion	Executive Member for Children's Services
Apologies for Absence:	Jim Parker	
	Jon Reynolds	
Officers in Attendance:	Mr P Dudley	Acting Director of Children's Services/Assistant Director Children's Services (Learning & Strategic Commissioning)
	Ms D Hill	Senior Finance Manager - Children's Services
	Mr L Manning	Committee Services Officer
	Mrs H Redding	Head of Learning and School Support

**CBSF/12/59 Dedicated Schools Grant (DSG)**

The Chairman opened the meeting by expressing thanks, on behalf of the Forum, to the members of the Technical Funding Group and the Council's officers for their efforts in preparing the consultation on the revised school funding formula for 2013/14 in Central Bedfordshire.

Consideration was first given to the background to the requirement for the consultation exercise. The meeting was reminded that the Department for Education (DfE) had launched its own consultation on school funding reform,

entitled 'Next Steps Towards a Fairer System', in March 2012. That consultation had ended in May 2012 and the final funding arrangements for 2013/14 announced on 28 June 2012. The meeting noted how, under the new arrangements, the Dedicated Schools Grant (DSG) would be split into three notional blocks: Schools, High Needs and Early Years. Local authorities would be free to move funding between the blocks subject to compliance with the requirements of the Minimum Funding Guarantee and central expenditure. The entire Schools Block had to be delegated to schools with a few exceptions. The meeting noted the arrangements for the High Needs and Early Years funding blocks. The arrangements for these blocks did not form part of the consultation process.

The meeting further noted that the DfE had announced that it would introduce a national funding formula in the next Spending Review period. To support the movement towards this all local authorities were required to simplify their arrangements for distributing funding to schools and other providers. The current School Funding Regulations allowed for up to 37 funding factors in an authority's formulae; Central Bedfordshire Council operated with 27 but from 2013/14 only 12 factors would be allowed, two of which did not apply to Central Bedfordshire.

Members were aware that, as a result of the DfE's announcement, a Technical Funding Group had been formed at the Schools Forum meeting on 25 June 2012 to consider the factors in the Council's current formula which were not compliant under the new system. The minutes of two of the three Group meetings which had been held were attached at Appendices A and B to the report (the third meeting having not been minuted due to the nature of its workload). Arising from the Group meetings a draft 'School Funding Consultation 2013/14' document had been prepared. A copy of the document, attached at Appendix C to the report, included proposals for allocating all funding through the factors which were permissible under the new system. Also arising from the Group meetings had been the preparation of a Frequently Asked Questions document to help with initial questions. A copy of the document was attached at Appendix D to the report.

With regard to the timescale for the consultation it was noted that the consultation document and the Frequently Asked Questions sheet would be issued to schools on 4 September and surgeries for specific school queries would be held at the Council's offices in both Chicksands and Dunstable on 20 September 2012. There would no presentations on the basis that all schools were fully aware of the background to the funding reform measures. The collation and analysis of responses would follow and the outcome submitted to the Forum meeting on 22 October 2012.

A copy of the questionnaire that would accompany the consultation document was circulated to all Members for comment. The meeting was advised that an example of the responses received to the questionnaire would be used to inform the surgeries. In addition the information received would be used to periodically update the FAQ sheet because of the possible impact it could have on later questions.

There were no queries on the content of the FAQ sheet, the minutes of the Group meetings or on the questionnaire to be circulated with the consultation document.

Reference was made to the tight deadline between the close of the consultation on 28 September and the collation and analysis of the responses to enable consideration by the Forum on 22 October. In response the Head of Learning and School Support explained that responders would be encouraged to return the on-line consultation as this would assist in the collation and analysis process. The Senior Finance Manager, Children's Services added that the start of the consultation had been set for 4 September to ensure that schools had returned from the summer break and staff were present. With regard to ensuring that the views of school governing bodies were also submitted she stated that governors had been briefed over the previous 18 months and were fully aware of the DSG arrangements and funding reform consultation. A Member suggested that governing bodies would, in any case, be almost certain to be scheduled to meet within the first half of the first term.

The Senior Finance Manager, Children's Services referred Members to the draft consultation document. She explained that the document to be circulated would comply with the corporate format and so would appear different to that of the draft. The Senior Finance Manager, Children's Services stated that there would be slight changes to grammar to the draft consultation document but not to the context of the document itself.

The meeting then worked through the draft consultation document, Members raising various comments and suggestions. In particular the Forum acknowledged that it should be made clear in the covering letter accompanying the consultation document that the revised funding formula would initially be applied for one year only and would subsequently be revised in the light of further changes. It was also felt that the need to revisit the allocation of an additional lump sum to those schools meeting the definition of split site as, possibly, more schools merged and worked across two sites, should be made clear.

At this point in the meeting the Detailed Financial Model (Appendix E to the report) was circulated for Members consideration. The Senior Finance Manager, Children's Services worked through the Model which was to be circulated, as supplied, with the consultation document. Comment was passed on the need to include a clear indication as to the financial impact on individual schools. Due to the constraints on the existing format it was felt that a separate summary of the Model presenting the most essential data should be circulated as well.

There being no further comments the Senior Finance Manager, Children's Services stated that the proposed amendments would be incorporated in the consultation document, together with any additional information required, and circulated to all head teachers and governing bodies the next day.

**NOTED**

the deployment of the Dedicated Schools Grant for 2012/13.

**RESOLVED**

- 1 that, subject to the incorporation of the required amendments, the consultation document on the proposed school funding for 2013/14 be approved and circulated to all head teachers and governing bodies for comment;
- 2 that the list of Frequently Asked Questions be approved and circulated with the consultation document and that the list be amended in response to those questions received from schools;
- 3 that the questionnaire be approved and circulated with the consultation document;
- 4 that, subject to the incorporation of the required amendments, the Detailed Financial Model be approved and circulated with the consultation document;
- 5 that a summary of the Financial Model be prepared and circulated with the consultation document;
- 6 that the cover letter issued with the consultation document include a reference stating that the revised funding formula will apply for one year (2013/14) and will subsequently be revised.

(Note: The meeting commenced at 4.30 p.m. and concluded at 5.51 p.m.)

Chairman.....

Dated .....

**Meeting:** Schools Forum  
**Date:** 22 October 2012  
**Subject:** School Funding Reform: Arrangements for 2013/14  
**Report of:** Deputy Chief Executive and Director of Children’s Services  
**Summary:** To note the update on the Funding Consultation with Schools and propose the formula factors for distribution of the DSG for 2013/14

Contact Officer: Dawn Hill, Technology House

Public/Exempt: Public

Wards Affected: All

Function of: Council

Reason for urgency  
(if appropriate)

**RECOMMENDATIONS:**

- |           |  |
|-----------|--|
| <b>1.</b> | <b>To note the School Funding Reform Consultation process.</b>   |
| <b>2.</b> | <p><b>To propose the following factors are included for distributing the Dedicated School Grant School Block for the 2013/14 financial year:</b></p> <ul style="list-style-type: none"> <li><b>i) Basic Entitlement for Primary, Key Stage 3 and Key Stage 4</b></li> <li><b>ii) Deprivation based on weighted banded IDACI data</b></li> <li><b>iii) Lump Sum £120,000</b></li> <li><b>iv) Split Site £120,000</b></li> <li><b>v) Rates based on actual cost</b></li> </ul> |
| <b>3.</b> | <b>To propose that those schools that gain due to the change in formula factors are capped at a sufficient rate to fund the Minimum Funding Guarantee.</b>   |
| <b>4.</b> | <p><b>To propose to de-delegate Facilities Time for the following phases:</b></p> <ul style="list-style-type: none"> <li><b>i) Lower Schools</b></li> <li><b>ii) Upper Schools</b></li> </ul>  |
| <b>5.</b> | <p><b>To propose to de-delegate School Specific Contingency for the following phases:</b></p> <ul style="list-style-type: none"> <li><b>i) Lower Schools</b></li> <li><b>ii) Middle Schools</b></li> <li><b>iii) Upper Schools</b></li> </ul>  |

<p><b>Background</b></p>
<p>1. Since the beginning of the financial year 2006/07 local authorities have received allocations of Dedicated Schools Grant (DSG) to finance the Schools Budget in each authority. The DSG is a specific ring-fenced grant based on historical spending levels. The allocation is the full time equivalent number of pupils as at January census multiplied by the Guaranteed Unit of Funding (GUF) applicable to each local authority. The GUF for Central Bedfordshire is £4,658 for 2012/13.</p>
<p>2. The Department for Education (DfE) held 2 Consultations in 2011; 'Rationale and Principles' and 'Proposals for a fairer system'. The second Consultation proposed replacing the current schools funding distribution mechanism. The aim for a transparent, fairer and less complex system.</p>
<p>3. On the 26<sup>th</sup> March 2012, the Department for Education (DfE) launched a third Consultation 'Next steps towards a fairer system' which ended on the 21<sup>st</sup> May 2012. This consultation built on how a fairer system may be implemented and operated. The final arrangements for 2013/14 were announced on the 28<sup>th</sup> June 2012.</p>
<p><b>Funding Arrangements 2013/14</b></p>
<p>4. From 2013/14 the DSG will be split into three notional blocks; Schools (£142.5M), Early Years (£10.5M) and High Needs (£20.9M). Authorities are free to move funding between the blocks provided that they comply with the requirements of the Minimum Funding Guarantee (MFG) and central expenditure. The entire Schools block must be delegated to Schools with a few exceptions.</p>
<p>5. There will be no additional funding before at least 2015. The DfE have confirmed they will introduce a national funding formula in the next Spending Review period. The 2013/14 settlement will be based on 2012/13.</p>
<p>6. In order to support the movement towards a national funding formula, all local authorities are required to simplify local arrangements for distributing funding to schools and other providers. The current School Funding Regulations allow authorities to use up to 37 funding factors within their formulae. Central Bedfordshire's local arrangements operate with 27. From 2013/14 only 12 factors will be permitted, two of which are not applicable to Central Bedfordshire.</p>
<p>7. Funding will be now based on October pupil census, uplifted to reflect the difference between October and January counts. Early Years will be calculated based on three January counts e.g. 13/14 estimates based on Jan 12, updated for Jan13 in the summer 2013 and adjusted at year end for Jan 14 count.</p>
<p>8. The Minimum Funding Guarantee (MFG) is set at negative 1.5% per pupil for both 2013/14 and 2014/15. There will be a separate Early Education MFG for all providers for the first time but only for the base rates.</p>



**Consultation with Schools**

9. Following extensive discussions between the LA and the Technical Funding sub group of the School Forum, modelling work was carried out during the summer break and well considered before proposed formula were put forward. The draft School Funding Consultation Document was presented to the full School Forum on the 3<sup>rd</sup> September 2012. Following full agreement the Consultation document was launched on the 4<sup>th</sup> September 2012 with an end date of 28<sup>th</sup> September 2012. A Frequently Asked Question (FAQ) document was also provided to help with initial questions. Schools and Governors were advised in July 2012 that the Consultation responses would need consideration during September 2012.

10. Articles were placed in both Central and Governor Essentials highlighting the consultation and reminders posted. Finance surgeries were held at both Dunstable and Shefford to allow schools to discuss their own individual circumstances. Forty three people attended which represented twenty eight schools. The FAQ's were updated and made available through Central Essentials following those discussions. A revised Financial Summary was also provided as requested to show the increase in Pupil Premium in 2013/14.

**Consultation Responses**

11. The Technical Funding sub group met with LA officers on the 3<sup>rd</sup> October to discuss the analysis of the consultation responses.

12. Seventy responses were received, including two late submissions. This represented 58 schools; 50 Maintained schools and 8 Academies. Some schools sent in multiple responses and it was agreed for the purpose of the analysis has been counted as one per school. The table below shows the response per phase:

Phase	Number of School responses	Schools in phase	Response per phase
Nursery	1	4	25%
Lower	41	95	42%
Middle	9	24	38%
Upper	5	10	50%
Special	2	3	67%
<b>Total</b>	<b>58</b>	<b>136</b>	<b>43%</b>
<b>Maintained</b>	50	100	50%
<b>Academy</b>	8	36	22%

13. The following table shows each question asked and grouped the number of responses that either strongly agreed or agreed together and compared to those that strongly disagreed or disagreed. The percentage column shows the number of responses in favour of the proposals compared to those against, as a percentage of the overall responses.

Question	Number of responses that Strongly Agreed + Agreed	Number of responses that Strongly Disagreed + Disagreed	Agree	Against
Separate unit values for KS 3 and KS 4	28	3	48%	5%
Banded IDACI to direct Deprivation funding	41	8	71%	14%
Exclude LAC as a factor	33	13	57%	22%
Exclude HILLN as a separate factor and distribute through basic entitlement	34	18	59%	31%
Exclude EAL as a factor	27	18	47%	31%
Lump Sum of £120,000	38	15	66%	26%
Rates funded on actual	52	0	89%	0%
Exclude PFI as a factor	32	0	56%	0%
Cap schools that gain to fund MFG	41	11	71%	19%
<p>14. It was agreed that the FAQ would be further updated to cover some confusion that is still evident from the general comments provided in the consultation responses. This has been distributed through Central Essentials week ended 5<sup>th</sup> October 2012 (Appendix A).</p>				
<p>15. EAL was also further discussed; there are 55 pupils across Central Bedfordshire schools that are registered as EAL in year one of entering compulsory school age. The numbers are low across Central Bedfordshire schools and the amount provided per school would be small.</p>				
<p>16. A definition had also been provided for split site and has been updated following the consultation responses. Eligibility for the factor is focused on single schools, based on two or more sites, each separated such that they do not share a common boundary and where use of a public highway is necessary to travel between each distinct site. Each site must be centres of class teaching and learning.</p>				
<p>17. It was confirmed that the exclusion of PFI as a factor would be revisited in 2014/15.</p>				
<p><b>De-Delegation</b></p>				
<p>18. The entire School Block must be delegated to schools with a few exceptions, one of which is where Schools Forum agrees that a service should be provided centrally. Funds are allocated through the Schools Individual Formula in the first instance. De-delegation only applies to the Maintained sector and has therefore removed the need for the DSG Local Authority Central Spend Equivalent Grant (LACSEG) for Academies.</p>				

19. Where a service is to be provided centrally, School Forum approval must be given for each individual phase.

20. The two services that were included in the consultation were Facilities Time (Union representation at meetings etc) and School Contingency (Closing and re-organising schools, schools in financial difficulty etc).

21. The table below shows the number of responses for both Academy and Maintained schools for each central service. The proposal will be made based on Maintained schools only; Academy responses have been included for information only.

Academies	Number of responses that Strongly Agreed + Agreed			Number of responses that Strongly Disagreed + Disagreed		
	Lower	Middle	Upper	Lower	Middle	Upper
Facilities Time	0	1	2	0	1	1
School Contingency	0	1	2	0	1	1

Maintained	Number of responses that Strongly Agreed + Agreed			Number of responses that Strongly Disagreed + Disagreed		
	Lower	Middle	Upper	Lower	Middle	Upper
Facilities Time	22	1	1	5	3	0
School Contingency	24	2	2	3	2	0

22. A query is still outstanding from the Department as to the treatment of de-delegation for Nursery and Special Schools as these schools are funded from outside of the Schools Block.

23. The proposals for de-delegation will be based on the consultation responses and subject to School Forum agreement per phase. Middle school de-delegation for Facilities Time will therefore not be recommended as a proposal for 2013/14 due to 3 out of the 5 responses being against the proposal.

### Growth Funds

24. Funds can be retained from the Schools Block before allocating formula, with agreement of School Forum, for funding significant pre-16 pupil growth and expenditure incurred in order to make provision for extra classes (to comply with School Admissions (Infant Class Sizes) Regulations). Funds must be used on the same basis for the benefit of both maintained schools and Academies.

25. Any funds remaining at the end of the financial year must be added to the following year's DSG and reallocated to maintained schools and Academies through the local formula.

<p>26. Local Authorities are required to produce criteria on which any growth funding is to be allocated, and set out the circumstances in which a payment could be made and a basis for calculating the sum. The criteria will need to be proposed to the Schools Forum and again its agreement before growth funding is allocated. The LA will also need to consult on the total sum to be top-sliced from each phase and must regularly update the Schools Forum on the use of the funding.</p>
<p>27. Criteria and details for payment are currently being drafted and will be brought to a future meeting of the School Forum.</p>
<p><b>Pupil Premium</b></p>
<p>28. Pupil Premium is in addition to the Schools Block and will remain a separate grant in 2013/14, although the Departments long term intention is to merge with the DSG. The Premium for 2013/14 has increased to £900 and will continue to be based on Ever 6 (Free School Meals). The summary Financial Model has been updated to include a memorandum column to show the increase in Pupil Premium for 2013/14 (Appendix B).</p>
<p><b>Recommendations of the Technical Funding Group</b></p>
<p>29. The sub group agreed that the proposals in the Consultation would be put forward to School Forum for agreement.</p>

**Appendix A:** Frequently Asked Questions updated 2<sup>nd</sup> October 2012

**Appendix B:** Summary Financial Model updated for memorandum Pupil Premium

## School Funding Consultation 2013/14 - Frequently Asked Questions

### Basic per- pupil entitlement

1. Q Is AWPU now the Basic Entitlement as in various parts of the document it talks of AWPU and Basic Entitlement?  
A These are the same thing

### Deprivation

2. Q Can the indices FSM, Ever 6 FSM and IDACI be mixed?  
A No. Local decision making is to be much simpler, more transparent and efficient. Under the new arrangements the LA will be able to use a free school meals (FSM) indicator and/or an IDACI rating when distributing funding for deprived pupil.
3. Q Please can you confirm what is IDACI?  
A It is the Income Deprivation Affecting Children Index and is part of the indices of Multiple Deprivation (IMD). It is an area based measure defined at the level of Lower Super Output Area. It takes the form of a score between 0 and 1, which can be interpreted as the proportion of families in the LSOA, with children aged under 16, which are income deprived.
4. Q Is there any choice on the index used, can we stay with our current ACORN index of deprivation?  
A No. The DfE have restricted the deprivation factor to FSM, Ever 6 and IDACI.
5. Q How will the LA know which of our pupils are categorised into these various indices?  
A Data will be provided by the DfE. LAs are required to use only the DfE data. IDACI and FSM will be as at Autumn 2011 Census and Ever 6 Spring 2011.
6. Q Why IDACI?  
A The DfE are enabling LAs to use IDACI as it is the only national index of deprivation that is focused on children, using individual post code information. IDACI is calculated as Lower Super Output Area (LSOA) level. An IDACI score is the measure of probability that a child living in the LSOA will be deprived. In other words, a child with an IDACI score of 0.2 has a 20% chance of coming from a deprived family.

This means that whilst FSM can be used to target funding at specific pupils who come from deprived families, IDACI allows LAs to ensure that funding can also be distributed to schools

that have pupil living in the most deprived areas who might not be eligible for, or take up FSM.

### Lump sums

7. Q Why have these particular lump sums been identified?  
A The aim of the lump sum is to meet unavoidable fixed costs incurred by a school – that is a headteacher, a caretaker and some administrative support. Analysis carried out by the DfE showed that, for a primary school, the average lump sum required for this purpose is around £95,000. Because a number of other factors are being removed and it is required that a single lump sum be applied for both primary and secondary schools, it was agreed that this might need to be higher.
8. Q Can a different lump sum be set for primary and secondary?  
A No the same lump sum must be applied to both phases. The lump sum is predominantly aimed at supporting small schools that will not attract enough funding through their per-pupil funding. It is the DfE's view that the majority of funding should be distributed through the basic per-pupil entitlement or the remaining pupil characteristics factors so that funding can genuinely follow the pupil.
9. Q Is the protection for federated schools with a single budget share likely to continue i.e. will they get one lump sum or two?  
A LAs will still be able to issue a single budget share but this will be at least as great as if the schools had still been separate. In practice under the new system this will mean calculating the budgets separately and adding them together before issuing the budgets.
- 10.Q What is the impact on the AWPU value for primary schools of raising the lump sum?  
A The lump sums must be the same for all phases. The LA and School Forum agreed at the beginning of this process to ensure the same amount of funding that was directed to each phase, remained at 12/13 levels. The AWPU values for primary schools, after allowing for those factors that are no longer permitted, would be higher if the lump sum was lowered. Lower Schools were funded £95,000 in 2012/13 for lump sum.

### Exceptional Items

- 11.Q A number of schools pay for rent for curriculum classes. As this is no longer permitted as a factor, can this be applied for under exceptional items.  
A No. The LA are able to ask the Secretary of State for permission to include such items but they must affect no more

than 5% of schools and account for at least 1% of the budget. Rent does not meet this criterion.

### Central provision of services

- 12.Q If one or both phases of schools express a wish to de-delegate an element of their budget share does the LA have the option to refuse? Can the LA charge an administration fee for managing such budgets?
- A Either primary or secondary schools within the Schools Forum might take the initiative in requesting that a permissible item should be de-delegated, but there would be no obligation on the LA to accept the de-delegation, including charging any necessary administrative costs.
- 13.Q Can any of the newly delegated funding be de-delegated for Academies?
- A De-delegation does not apply to Academies but they can still buy into services from their delegated budgets
- 14.Q There are only three exceptions to the general rule that Schools Block funding is delegated to schools in the first instance. Does that mean the LA may not de-delegate funding even if there was a clear mandate from schools to do so or there are protocols in place based on continued central funding? The specific example is union facilities time?
- A That is correct. The DfE are limiting central services to those listed in Exception 1. Union Facilities does come under staff cover which means maintained schools can vote to de-delegate.
- 15.Q It has been confirmed that Trade Union time is included within Exception 1 so funding would be delegated to all schools and Academies in the first instance and maintained schools within a phase could agree for this funding to be de-delegated for this purpose. There are a number of trade union representatives that are currently employed by Academies and are unclear how this would operate under the proposed changes. Currently, Academies reclaim these costs from the LA. It is our understanding that under the proposed changes Academies would receive their 'share' of the budget and it is only maintained schools in a phase that can agree to de-delegate funding.
- A Yes, that is correct. De-delegation applies only to maintained schools and so funding is in Academies' budgets to start with.
- 16.Q Within Exception 1, contingencies can be retained for maintained schools for a limited range of circumstances, one being amounts for schools in financial difficulty. Can you clarify

how parity of treatment is ensured between maintained schools and Academies?

- A Academies will be responsible for managing their own budgets and are principally responsible for their own contingency. In the case of an Academy falling into serious financial difficulty, the Education Funding Agency will review the case and determine whether to provide support, and what form of support should be provided.

### **General**

17.Q Can you confirm that the pupil numbers collected in the Autumn School Census 2012 will be used to calculate the funding for 2013/14.

- A Yes, the Autumn 2012 census will be used to allocate funding for 2013/14.

### **Minimum Funding Guarantee**

18.Q How will the MFG be afforded?

- A LAs will be able to limit gains in order to make the MFG affordable.

19.Q Re a cap on gains, can a different cap be applied to primary and secondary sectors?

- A No. The proposal is to have a single percentage cap.

20.Q The level of the MFG has been set for two years, why only two years?

- A The funding parameters beyond 2014/15 are subject to the next Spending Review and decisions on the future level of protection will be made following that.

### **Early Years**

21.Q Does the lump sum applied to Nursery need to be the same as Primary and Secondary?

- A No

22.Q Does the Deprivation factor in the EYSFF need to change in line with the Primary and Secondary?

- A No. LA's can have a deprivation factor in the EYSFF which is different.

### **Updated 20<sup>th</sup> September 2012**

### **Rates**

23.Q What would an alternative be for funding rates on an actual basis?



- A The total amount of rates funded for all schools would be added together and converted into a per pupil rate and added to the basic entitlement (AWPU). The disadvantage of this would be those school with a high rateable value may not receive sufficient in the basic entitlement to cover the actual cost of the rates payable. Rates have previously been funded on an actual basis and so it was deemed to be fair and cause less turbulence to remain funding in the same way.

### **PFI**

- 24.Q Please clarify that a PFI factor is to fund the 'funding gap' for those schools.
- A No the factor permitted to be used is designed to deal with the additional costs incurred by the school as a result of their PFI status. The PFI factor should only cover net additional costs incurred by the school and should not result in a profit. The funding gap is not paid from DSG.

### **MFG**

- 25.Q How is the MFG being applied, we do not understand why the percentage loss in the first year varies for different schools and yet the rate of negative 1.5% has been applied?
- A The calculation for MFG has been substantially simplified and is clearly specified in Schedule 4 of 'The School and Early Years Finance (England) Regulations'. This applies to pupils in age ranges 5-16 and excludes funding for early years children and young people over 16.

### **Lump Sum**

- 26.Q Why are small upper schools having the same lump sum as large upper schools?
- A The 'Lump sum' is an optional factor and is provided to all mainstream schools (including Academies) irrespective of size and is aimed as a contribution to the basic costs of operating a school. The regulations do not allow different lump sums to be set.
- 27.Q The question on lump sum cannot be answered as it is not indicated where the extra funding will come from and which area of the formula will lose out?
- A There is no additional funding. Those factors that are no longer permissible have been converted into a per pupil amount per phase. If a higher lump sum is applied this would result in a lower basic entitlement per pupil.

## Rent

- 28.Q The school pays rent for the right to exist in the school building as there are no other possible school premises. The proposal is to exclude any consideration for rent. Please investigate some way around this.
- A The regulations only allow an exceptional item to be applied for when it affects less than 5% of the LA schools (including Academies) and amounts to more than 1% of the School Budget Share. Rent did not meet this criteria. However, the LA has requested that the Department consider this particular circumstance.

## Deprivation

- 29.Q The change in methodology for 'Deprivation' will mean a significant loss in funding. Were any other alternative calculation methods considered?
- A Yes, Free School Meals and Ever 6 (those pupils eligible in the past 6 years). Modelling showed that those schools currently receiving funding for 'Deprivation' would be affected greater than the use of IDACI. The current system of funding uses ACORN data and is no longer permitted.

## Looked After Children

- 30.Q A school with long term LAC has significant workload and provision costs. LAC also have difficulties that prevent them from maintaining good progress. What funding is being made available for these additional costs?
- A There is no factor currently in the Individual School Budgets for LAC. LAC pupils receive Pupil Premium and this remains unchanged. The LA and School Forum considered introducing a LAC factor but data showed this applied to few schools and authority wide was few in number. Funding also would not follow the child should they move after the pupil census date.

## Early Years

- 31.Q Will Early Years also be based on the October Census.
- A No. Early Years will be based on 3 January counts, e.g 13/14 estimates based on January 12, updated for January 13 in the summer 2013 and adjusted at year end for January 14 count.

## General

- 32.Q Why are schools only being presented with a one year budget?
- A The Department are not prescribing a minimum percentage to be allocated through the age-weighted funding or through the pupil-led factors for 2013/14. However, they have stated that

this may change in the future once the 2013/14 data has been reviewed.

- 33.Q How will schools access/apply to the Growth Fund?  
A A criteria will be set and agreed with the School Forum. Further information will be provided once it is agreed.
- 34.Q It is unclear what will happen to statemented pupil funding, will this be unidentified in most cases, or will the funding still follow the pupil?  
A Funding for Statemented children will remain unchanged. Schools already fund the first 11 hours from their notional SEN budget and the LA provides the top up against the level of need which is linked to the Statementing funding bands.
- 35.Q What is the current amount received from Central Government for each pupil in Central Bedfordshire and how does this compare with the national average.  
A The Central Bedfordshire Unit of Funding for 2012/13, and will remain unchanged for 2013/14 is £4,658. Central Bedfordshire is ranked the 14<sup>th</sup> lowest funded authority out of 151 (including the City of London). Leicestershire is the lowest funded authority with £4,429 and the City of London the highest with £9,373. The national average is £5,247.

**Updated 2<sup>nd</sup> October 2012 following analysis of Consultation responses**

- 36.Q Where does the LAC funding currently go? Can it be shown separately?  
A Funding is sent direct to schools on a termly basis (1/3 of £600) on the number of LAC children. This is in addition to the schools individual budget.
- 37.Q Why cant Key Stage one results be used for HILLN?  
A The Government has determined that the only data that can be used for funding HILLN is Early Years Foundation Stage and Key Stage 2.
- 38.Q Why are the most deprived schools being penalised in this model, additional review needs to be undertaken?  
A The LA modelled the impact of using Free School Meals as this is the only other choice that was given to IDACI. The impact on the schools in the most deprived areas was significantly greater. There is no choice on the use of IDACI as opposed to ACORN. The current system used by Central Bedfordshire directs the funding only to those schools with 15% or more pupils in the most deprived categories. This disadvantaged schools that fell just beneath the 15% threshold (this could be 1 pupil). The Government are imposing a system of a unit rate per deprived pupil.

39.Q How can schools with a larger number of traveller pupils on role be supported to meet their specific needs?

A The new system does not allow a separate factor to be used for Traveller pupils, only EAL. The Forum reviewed the number of pupils with EAL across the council and the maintained sector. The current amount that was agreed by School Forum in 2012/13 to be retained, would be significantly reduced with the increase in the number of Academies who receive their proportion in their budgets. Data showed number of EAL pupils to be low across Central Bedfordshire Schools.

40.Q The school has an old building with significant maintenance costs. Can this be reflected in a different lump sum?

A The regulations only allow one lump sum. There is not currently a factor specifically for this requirement and the LA are not permitted to introduce new factors.

Summary - Financial Model

School	12/13 Budget	Proposed New Formula (based on 12/13 Pupil Numbers)	Difference (before Protection / Capping)	New MFG at (-1.5%)	Capping at 4.2%	Revised New Formula (after Protection / Capping)	Difference after Protection / Capping	% Difference after Protection / Capping	Number of Pupils eligible for PPG	Increase in PPG per FSM
Arlesey	264,496	247,406	(17,090)	14,818	0	262,224	(2,272)	(0.9%)	0	0
The Lawns	400,075	327,677	(72,398)	63,577	0	391,254	(8,821)	(2.2%)	0	0
Westfield	390,636	322,575	(68,061)	63,820	0	386,394	(4,242)	(1.1%)	0	0
Willow	299,948	273,633	(26,315)	23,370	0	297,003	(2,945)	(1.0%)	0	0
<b>Sub Total</b>	<b>1,355,156</b>	<b>1,171,291</b>	<b>(183,865)</b>	<b>165,585</b>	<b>0</b>	<b>1,336,875</b>	<b>(18,280)</b>		<b>0</b>	<b>0</b>
<b>Loweres</b>										
All Saints	501,131	531,660	30,529	0	(9,482)	522,178	21,047	4.2%	17	5,100
Ardley Hill	782,487	794,305	11,818	0	0	794,305	11,818	1.5%	46	13,800
Ashton St Peters (va)	602,317	633,820	31,503	0	(6,206)	627,614	25,297	4.2%	18	5,400
Aspley Guise	503,545	528,462	24,916	0	(3,767)	524,694	21,149	4.2%	9	2,700
Beaudesert	859,822	857,517	(2,306)	0	0	857,517	(2,306)	(0.3%)	44	13,200
Beecroft	999,651	968,688	(30,962)	7,594	0	976,282	(23,369)	(2.3%)	110	33,000
Caldecote	358,215	356,136	(2,079)	0	0	356,136	(2,080)	(0.6%)	6	1,800
Campton	499,508	508,091	8,582	0	0	508,091	8,582	1.7%	6	1,800
Chalton	313,922	290,514	(23,408)	0	0	290,514	(23,408)	(7.5%)	4	1,200
Church End	887,448	952,140	64,692	0	(27,419)	924,721	37,273	4.2%	38	11,400
Clipstone Brook	682,814	702,103	19,289	0	0	702,102	19,289	2.8%	49	14,700
Cranfield	883,843	916,088	32,244	0	0	916,088	32,245	3.6%	36	10,800
Derwent	459,936	467,758	7,821	0	0	467,757	7,821	1.7%	4	1,200
Doverly Down	527,575	578,140	50,565	0	(28,407)	549,733	22,158	4.2%	11	3,300
Downside	576,750	484,451	(92,300)	49,251	0	533,701	(43,049)	(7.5%)	53	15,900
Dunton	316,264	283,261	(33,003)	0	0	283,261	(33,003)	(10.4%)	6	1,800
Eaton Bray	458,662	491,566	32,904	0	(13,640)	477,926	19,264	4.2%	11	3,300
Eversholt	348,719	329,702	(19,017)	0	0	329,701	(19,017)	(5.5%)	2	600
Everton	252,839	248,249	(4,590)	0	0	248,249	(4,590)	(1.8%)	6	1,800
Fairfield Park	846,770	850,612	3,842	0	0	850,611	3,841	0.5%	17	5,100
Flitwick	856,332	878,015	21,683	0	0	878,015	21,683	2.5%	18	5,400
Gothic Mede	872,389	866,963	(5,426)	0	0	866,964	(5,425)	(0.6%)	34	10,200
Gravenhurst	246,881	231,612	(15,269)	0	0	231,612	(15,269)	(6.2%)	0	0
Greenfield	486,287	507,443	21,157	0	(733)	506,711	20,424	4.2%	7	2,100
Greenleas	1,024,541	1,159,028	134,487	0	(91,456)	1,067,572	43,031	4.2%	13	3,900
Hadrian	932,802	1,005,281	72,479	0	(33,301)	971,979	39,177	4.2%	47	14,100
Harlington Lower	484,896	493,977	9,082	0	0	493,977	9,082	1.9%	8	2,400

Summary - Financial Model

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Hawthorn Park	1,673,833	1,651,740	(22,093)	0	0	1,651,740	(22,093)	(1.3%)	108	32,400
Haynes	444,478	432,570	(11,908)	0	0	432,570	(11,908)	(2.7%)	8	2,400
Heathwood	669,900	655,068	(14,831)	0	0	655,068	(14,831)	(2.2%)	20	6,000
Hockliffe	348,518	305,278	(43,240)	4,553	0	309,831	(38,687)	(11.1%)	14	4,200
Houghton Conquest	326,831	293,463	(33,368)	0	0	293,463	(33,368)	(10.2%)	8	2,400
Houghton Regis	823,538	806,992	(16,546)	402	0	807,394	(16,145)	(2.0%)	55	16,500
Husborne Crawley	278,526	281,542	3,016	0	0	281,542	3,016	1.1%	8	2,400
Dunstable Icknield	978,692	1,065,399	86,707	0	(45,602)	1,019,797	41,105	4.2%	57	17,100
John Donne	394,033	388,487	(5,546)	0	0	388,488	(5,546)	(1.4%)	11	3,300
Kensworth	350,211	291,097	(59,114)	17,638	0	308,734	(41,476)	(11.8%)	9	2,700
Kingsmoor	619,402	585,948	(33,454)	13,694	0	599,643	(19,759)	(3.2%)	32	9,600
Laburnum	587,325	548,386	(38,939)	11,954	0	560,339	(26,986)	(4.6%)	21	6,300
Lancot	1,307,838	1,286,657	(21,182)	0	0	1,286,657	(21,182)	(1.6%)	52	15,600
Langford	599,501	612,810	13,308	0	0	612,810	13,308	2.2%	14	4,200
Lark Rise	853,816	903,946	50,130	0	(14,270)	889,676	35,860	4.2%	17	5,100
Lawnside	1,082,689	939,539	(143,150)	107,564	0	1,047,103	(35,587)	(3.3%)	61	18,300
Leedon	951,738	975,062	23,323	0	0	975,062	23,323	2.5%	51	15,300
Linslade Lower	816,619	839,984	23,365	0	0	839,984	23,365	2.9%	36	10,800
Maple Tree	728,070	763,850	35,780	0	(5,201)	758,649	30,579	4.2%	16	4,800
Mary Bassett	747,981	708,804	(39,177)	9,743	0	718,547	(29,434)	(3.9%)	62	18,600
Maulden	542,317	561,511	19,194	0	0	561,510	19,193	3.5%	9	2,700
Meppershall	391,766	417,068	25,302	0	(8,848)	408,220	16,454	4.2%	13	3,900
Moggerhanger	310,804	301,389	(9,415)	0	0	301,389	(9,415)	(3.0%)	6	1,800
Northill	328,571	318,899	(9,672)	0	0	318,899	(9,672)	(2.9%)	2	600
Potton	797,814	819,397	21,583	0	0	819,397	21,583	2.7%	30	9,000
Pulford	552,962	577,043	24,081	0	(857)	576,186	23,224	4.2%	10	3,000
Pulloxhill	321,900	290,103	(31,797)	0	0	290,103	(31,797)	(9.9%)	5	1,500
Ramsey Manor	1,025,336	1,062,992	37,656	0	0	1,062,992	37,656	3.7%	22	6,600
Raynsford	548,447	590,015	41,568	0	(18,533)	571,482	23,035	4.2%	8	2,400
Ridgmont	272,149	240,744	(31,406)	14,882	0	255,626	(16,524)	(6.1%)	3	900
Robert Peel	1,124,621	1,089,839	(34,781)	0	0	1,089,839	(34,782)	(3.1%)	56	16,800
Roecroft	658,048	695,805	37,757	0	(10,119)	685,686	27,638	4.2%	32	9,600
Russell	713,720	734,780	21,060	0	0	734,780	21,060	3.0%	18	5,400
Shefford	1,159,535	1,206,899	47,364	0	0	1,206,899	47,364	4.1%	43	12,900
Shelton	334,501	316,973	(17,528)	0	0	316,972	(17,528)	(5.2%)	7	2,100
Shillington	519,525	482,137	(37,388)	911	0	483,048	(36,477)	(7.0%)	13	3,900
Silsoe	591,028	590,660	(368)	0	0	590,660	(368)	(0.1%)	12	3,600

Summary - Financial Model

School	12/13 Budget	Proposed New Formula (based on 12/13 Pupil Numbers)	Difference (before Protection / Capping)	New MFG at (-1.5%)	Capping at 4.2%	Revised New Formula (after Protection / Capping)	Difference after Protection / Capping	% Difference after Protection / Capping	Number of Pupils eligible for PPG	Increase in PPG per FSM
Slip End	417,147	418,107	960	0	0	418,107	960	0.2%	9	2,700
Southcott	1,013,454	1,069,831	56,377	0	(13,812)	1,056,019	42,565	4.2%	24	7,200
Southill	330,481	295,870	(34,611)	0	0	295,870	(34,611)	(10.5%)	3	900
Southlands	948,929	980,007	31,079	0	0	980,007	31,078	3.3%	36	10,800
St Andrews	1,266,970	1,316,281	49,312	0	0	1,316,281	49,312	3.9%	62	18,600
St Christophers	710,532	775,407	64,875	0	(35,032)	740,374	29,842	4.2%	23	6,900
St Georges	452,103	348,301	(103,802)	76,540	0	424,841	(27,262)	(6.0%)	32	9,600
St Leonards	439,563	435,472	(4,091)	0	0	435,472	(4,091)	(0.9%)	6	1,800
St Marys (Clophill)	473,995	487,514	13,519	0	0	487,514	13,519	2.9%	8	2,400
St Marys (Stoffold)	796,441	853,153	56,711	0	(23,261)	829,892	33,451	4.2%	12	3,600
St Marys (Caddington)	667,107	657,932	(9,174)	0	0	657,932	(9,175)	(1.4%)	46	13,800
St Swithuns	750,525	751,002	477	0	0	751,002	477	0.1%	27	8,100
St Vincents	902,897	870,854	(32,043)	18,306	0	889,160	(13,738)	(1.5%)	14	4,200
Stanbridge	399,967	390,796	(9,170)	976	0	391,773	(8,194)	(2.0%)	24	7,200
Stondon	433,633	408,529	(25,103)	0	0	408,529	(25,104)	(5.8%)	5	1,500
Studham	252,605	250,846	(1,759)	0	0	250,846	(1,759)	(0.7%)	8	2,400
Sundon	368,723	346,030	(22,693)	0	0	346,030	(22,693)	(6.2%)	6	1,800
Sutton	328,234	317,251	(10,983)	0	0	317,251	(10,983)	(3.3%)	4	1,200
Swallowfield	901,568	987,255	85,687	0	(47,821)	939,434	37,866	4.2%	29	8,700
Templefield	919,099	993,337	74,239	0	(35,637)	957,701	38,602	4.2%	20	6,000
The Firs	907,953	980,754	72,801	0	(34,667)	946,087	38,134	4.2%	17	5,100
Thomas Johnson	435,733	426,684	(9,049)	0	0	426,684	(9,049)	(2.1%)	10	3,000
Thomas Whitehead	912,899	896,833	(16,067)	0	0	896,832	(16,068)	(1.8%)	62	18,600
Thornhill	706,657	666,903	(39,754)	6,487	0	673,390	(33,267)	(4.7%)	47	14,100
Tithe Farm	796,980	746,311	(50,669)	1,044	0	747,355	(49,626)	(6.2%)	80	24,000
Toddington St George	1,236,688	1,294,258	57,570	0	(5,629)	1,288,629	51,941	4.2%	42	12,600
Totternhoe	348,217	311,137	(37,080)	0	0	311,137	(37,080)	(10.6%)	6	1,800
Watling	749,873	627,598	(122,275)	0	0	627,598	(122,275)	(16.3%)	35	10,500
Westoning	501,962	521,851	19,888	0	0	521,851	19,888	4.0%	12	3,600
Woburn	349,641	298,431	(51,210)	8,074	0	306,505	(43,135)	(12.3%)	8	2,400
Wrestlingworth	303,401	283,227	(20,173)	0	0	283,227	(20,173)	(6.6%)	4	1,200
<b>Sub Total</b>	<b>61,366,909</b>	<b>61,556,221</b>	<b>189,312</b>	<b>349,613</b>	<b>(513,699)</b>	<b>61,392,128</b>	<b>25,218</b>		<b>2,290</b>	<b>687,000</b>
<b>Largest Loser</b>			<b>(143,150)</b>				<b>(49,626)</b>			
<b>Largest Winner</b>			<b>134,487</b>				<b>51,941</b>			

Summary - Financial Model

School	12/13 Budget	Proposed New Formula (based on 12/13 Pupil Numbers)	Difference (before Protection / Capping)	New MFG at (-1.5%)	Capping at 4.2%	Revised New Formula (after Protection / Capping)	Difference after Protection / Capping	% Difference after Protection / Capping	Number of Pupils eligible for PPG	Increase in PPG per FSM
<b>Middles</b>										
Alameda	2,115,774	2,180,517	64,743	0	0	2,180,517	64,743	3.1%	44	13,200
Arnold	2,056,142	2,136,348	80,206	0	0	2,136,348	80,206	3.9%	66	19,800
Ashton (va)	2,268,779	2,327,481	58,702	0	0	2,327,481	58,702	2.6%	102	30,600
Brewers Hill	1,080,169	906,300	(173,869)	155,220	0	1,061,520	(18,649)	(1.7%)	91	27,300
Brooklands	1,200,799	1,086,296	(114,503)	79,102	0	1,165,398	(35,402)	(2.9%)	87	26,100
Burgoyne	1,002,937	1,014,646	11,710	0	0	1,014,646	11,710	1.2%	33	9,900
Edward Peake	1,592,690	1,442,703	(149,987)	97,652	0	1,540,355	(52,335)	(3.3%)	73	21,900
Etonbury	1,652,665	1,610,552	(42,113)	2,161	0	1,612,713	(39,952)	(2.4%)	62	18,600
Caddington Village	1,937,368	1,977,756	40,388	0	0	1,977,756	40,388	2.1%	74	22,200
Fulbrook	1,403,423	1,449,059	45,636	0	0	1,449,059	45,636	3.3%	29	8,700
Gilbert Inglefield	2,027,621	1,894,696	(132,925)	86,611	0	1,981,307	(46,314)	(2.3%)	79	23,700
Henlow	2,007,205	2,069,511	62,306	0	0	2,069,511	62,306	3.1%	62	18,600
Holmemead	2,033,441	1,960,426	(73,015)	11,709	0	1,972,135	(61,306)	(3.0%)	64	19,200
Holywell	1,788,354	1,870,958	82,603	0	(7,493)	1,863,465	75,111	4.2%	64	19,200
Kings Houghton	2,115,650	2,013,685	(101,966)	15,992	0	2,029,678	(85,973)	(4.1%)	217	65,100
Leighton	1,804,914	1,874,766	69,852	0	0	1,874,766	69,851	3.9%	76	22,800
Linslade Middle	2,237,908	2,361,522	123,613	0	(29,621)	2,331,901	93,993	4.2%	76	22,800
Mill Vale	1,637,424	1,648,344	10,920	0	0	1,648,344	10,920	0.7%	97	29,100
Parkfields	2,041,353	2,106,668	65,316	0	0	2,106,669	65,316	3.2%	59	17,700
Priory Middle	1,911,615	1,899,861	(11,754)	0	0	1,899,861	(11,754)	(0.6%)	105	31,500
Robert Bloomfield	3,046,151	3,084,709	38,558	0	0	3,084,709	38,558	1.3%	82	24,600
Sandye Place	1,907,579	1,907,302	(277)	0	0	1,907,302	(276)	(0.0%)	104	31,200
Streetfield	1,906,147	1,808,187	(97,960)	37,583	0	1,845,770	(60,377)	(3.2%)	119	35,700
Woodland	2,218,538	2,311,417	92,879	0	0	2,311,417	92,879	4.2%	65	19,500
<b>Sub Total</b>	<b>44,994,647</b>	<b>44,943,710</b>	<b>(50,937)</b>	<b>486,030</b>	<b>(37,114)</b>	<b>45,392,628</b>	<b>397,981</b>		<b>1,930</b>	<b>579,000</b>
<b>Largest Loser</b>			<b>(173,869)</b>				<b>(85,973)</b>			
<b>Largest Winner</b>			<b>123,613</b>				<b>93,993</b>			



Summary - Financial Model

School	12/13 Budget	Proposed New Formula (based on 12/13 Pupil Numbers)	Difference (before Protection / Capping)	New MFG at (-1.5%)	Capping at 4.2%	Revised New Formula (after Protection / Capping)	Difference after Protection / Capping	% Difference after Protection/ Capping	Number of Pupils eligible for PPG	Increase in PPG per FSM
<b>Uppers</b>										
The Cedars	4,292,266	4,412,931	120,665	0	0	4,412,932	120,665	2.8%	96	28,800
Harlington upper	5,113,109	5,219,661	106,552	0	0	5,219,661	106,553	2.1%	109	32,700
Manshead	4,317,098	4,215,539	(101,559)	0	0	4,215,539	(101,559)	(2.4%)	142	42,600
All Saints Academy	2,433,230	2,281,872	(151,358)	57,022	0	2,338,894	(94,336)	(3.9%)	154	46,200
Queensbury	3,743,222	3,887,591	144,369	0	0	3,887,591	144,368	3.9%	126	37,800
Redborne	4,930,794	5,037,746	106,951	0	0	5,037,745	106,951	2.2%	82	24,600
Samuel Whitbread	6,054,202	6,158,066	103,864	0	0	6,158,066	103,864	1.7%	137	41,100
Sandy	3,455,031	3,524,190	69,159	0	0	3,524,190	69,159	2.0%	115	34,500
Stratton	4,554,809	4,454,015	(100,794)	0	0	4,454,015	(100,794)	(2.2%)	133	39,900
Vandyke	3,553,770	3,485,098	(68,672)	0	0	3,485,098	(68,672)	(1.9%)	125	37,500
<b>Sub Total</b>	<b>42,447,532</b>	<b>42,676,709</b>	<b>229,177</b>	<b>57,022</b>	<b>0</b>	<b>42,733,731</b>	<b>286,198</b>		<b>1,219</b>	<b>365,700</b>
<b>Largest Loser</b>			<b>(151,358)</b>				<b>(101,559)</b>			
<b>Largest Winner</b>			<b>144,369</b>				<b>144,368</b>			

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**Meeting:** Schools Forum  
**Date:** 22 October 2012  
**Subject:** Schools Forum Constitution & Terms of Reference  
**Report of:** Director of Children's Services and Deputy Chief Executive  
**Summary:** The report sets out a proposed change in the membership provision for the Schools Forum.

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**Advising Officer:** Mel Peaston, Committee Services Manager  
**Contact Officer:** Martha Clampitt, Committee Services Officer  
**Public/Exempt:** Public  
**Wards Affected:** All  
**Function of:** Council

#### **CORPORATE IMPLICATIONS**

##### **Council Priorities:**

- Improved educational attainment.

##### **Financial:**

1. The Schools Forum takes decisions and provides a response to consultation on School Funding Formula, contracts, financial issues and other matters.

##### **Legal:**

2. This report responds to legislative requirements on the composition of the Schools Forum.

##### **Risk Management:**

3. Not applicable.

##### **Staffing (including Trades Unions):**

4. Not Applicable.

##### **Equalities/Human Rights:**

5. Not applicable.

##### **Public Health**

6. Not applicable.

**Community Safety:**

7. Not Applicable.

**Sustainability:**

8. Not Applicable.

**Procurement:**

9. Not applicable.

**RECOMMENDATION(S):**

**The Forum is asked to include provision in the Constitution and Terms of Reference for a PRU representative.**

**Reason for Recommendation(s): To respond to recent legislation.**

**Executive Summary**

This report enables the amendment of the Schools Forum Constitution & Terms of Reference for a PRU representative.

**The Schools Forum (England) Regulations 2012**

10. The provisions of the Schools Forum (England) Regulations 2012 (“the Regulations”) came into force on 1 October 2012.
11. The Regulations required the Central Bedfordshire Schools Forum to be reconstituted by 1 October 2012 taking into account the new requirements set out in the Regulations.
12. The Forum re-elected its membership for three years and amended its Constitution & Terms of Reference, to reflect the increased Academy representation, at its meeting on 5 March 2012.
13. New Regulations, the Schools Forum (England) Regulations 2012, provide for the additional inclusion of a PRU representative on the Forum, on the same basis as the voting school members.
14. The proposed amendment, enabling compliance with the Regulations, is shown in the Constitution and Terms of Reference, attached at Appendix A.

**Appendices:** Appendix A – Constitution and Terms of Reference

**Background Papers:** (open to public inspection) None

## Central Bedfordshire Schools Forum

### CONSTITUTION and TERMS OF REFERENCE

#### Definitions

The Forum = the Schools Forum for the area covered by Central Bedfordshire Council

The Council = Central Bedfordshire Council in its role as Local Education Authority

1. The Central Bedfordshire Schools Forum (the Forum) will consist of 21 Members made up of 12 school members and 5 non school members and 4 Academy representatives made up as follows:-

#### **School Members (12)**

2 Lower School Headteachers  
2 Lower School Governors  
1 Nursery School Headteacher  
2 Middle School Headteachers  
1 Middle School Governors  
1 Upper School Headteachers  
1 Upper School Governors  
1 Special School Headteacher  
1 Academy Lower School Representative  
1 Academy Middle School Representative  
2 Academy Upper School Representatives  
1 PRU representative

#### **Non School Members (5)**

1 Roman Catholic Diocese Representative  
1 Church of England Diocese Representative  
1 Private, Voluntary or Independent sector Provider Representative  
1 Local Authority 14-19 Partnership Representative  
1 Trades Union Representative

#### **Observer (non-voting)**

- the Council's Executive Member for Children's Services

2. Forum Members will stand for three years at which time elections will take place for school Members and nominations will be sought for the non-school Members. Should a resignation be tendered from the Forum, an election will be held for the vacancy which will ensure that the representational balance is maintained. Each representative group (Headteachers and Governors by phase) will be responsible for the method by which they elect and nominate school Member representatives.
3. The Council will maintain a written record of the composition of the Schools Forum including the method by which representatives are elected or nominated. The Council will inform all schools of the membership of the Forum and will provide details of any non-school Member appointed to the Forum within one month of appointment. This will be carried out when constituting the Forum and after the appointment of any new or replacement Member.
4. Elected Members who hold an executive role within the Council and officers who have a role in strategic resource management of the authority are unable to be Members of the Forum (these restrictions do not apply to officers employed as teachers or who work for, and those who directly manage, a service which provides education to individual children and/or advice to schools on learning and behavioural matters). Despite these restrictions, officers and Members may attend and speak at Forum meetings. The Executive Member for Children's Services will be invited to attend meetings of the Forum as an observer. Council officers will support meetings of the Forum.
5. The quorum for the Forum is 7 Members.
6. Substitute Members will be allowed only after approval by the Forum.
7. The meetings of the Forum will be open to the public.
8. Members of the Forum are required to make declarations of interest on appointment and when, for example, the Forum is considering matters relating to contracts.
9. Meetings of the Forum will be called allowing at least two weeks notice. Supporting papers will be sent out at least five days before the meeting.
10. The Council shall appoint a Clerk for the Schools' Forum who shall be in attendance at each meeting of the Forum and will take minutes. Meetings will be recorded for the purposes of the accuracy of the minutes only.
11. All schools and associated groups will be provided with the minutes of all meetings of the Forum and of action taken by the Council on Forum advice.

12. Claiming of expenses for Forum Members will be in accordance with the Forum expenses policy document and claims will be made on the specific claim forms and duly authorised.
13. A budget of £3,000 will be available for each financial year for costs associated with the operation of the Forum e.g. hiring a venue, expenses and clerking costs. This will be a charge against the Council's Local Schools Budget and retained centrally. The level of the budget will be reviewed annually.

#### **Items for Forum Discussion**

14. The Forum will discuss and be consulted upon the following matters:

##### Consultation on School funding formula

The Council shall consult the Forum on any proposed changes in relation to the factors and criteria that were taken into account, or the methods, principles and rules that have been adopted, in their formula made in accordance with regulations made under section 47 of the School Standards and Framework Act 1998, and the financial effect of any such change.

Consultation shall take place in sufficient time to allow the views expressed to be taken into account in the determination of the Council's formula and in the initial determination of schools' budget shares before the beginning of the financial year.

##### Consultation on Contracts

The Council shall, at least one month prior to the issue of invitations to tender, consult the Forum on the terms of any proposed contract for supplies or services being a contract paid or to be paid out of the Authority's schools budget where either

- a) the estimated value of the proposed public services contract is not less than the specific threshold which applies to the authority in pursuance of Regulation 7(1) of the Public Services Contracts Regulations 1993; or
- b) the estimated value of the proposed public supply contract is not less than the specific threshold which applies to the authority in pursuance of Regulation 7 (2) of the Public Supply Contracts Regulations 1995.

##### Consultation on financial issues

The Council shall consult the Forum annually in respect of its functions relating to the schools budget, in connection with the following:

- a) the arrangements to be made for the education of pupils with special educational needs;
- b) arrangements for the use of pupil referral units and the education of children otherwise than at school;
- c) arrangements for early years education;
- d) arrangements for insurance
- e) prospective revisions to the authority's scheme for the financing of schools;
- f) administrative arrangements for the allocation of central government grants paid to schools via the authority; and
- g) arrangements for free school meals

Consultation on other matters

The Council shall consult the Forum on arrangements for

- a) the mainstreaming of Teachers' pay grants into the Council's school funding formula; and
- b) updating non-AWPU data within the multi-year budget cycle.

The Council may consult the Forum on such other matters concerning the funding of schools as they see fit.

15. The Forum shall also have the following powers:

- a) to agree minor changes to the operation of the minimum funding guarantee, where the outcome would otherwise be anomalous, and where not more than 20% of the Authority's schools are affected. Changes affecting more than 20% of schools will have to be approved by the Secretary of State;
- b) to agree to the level of school specific contingency at the beginning of each year;
- c) to agree arrangements for combining elements of the centrally retained Schools Budget with elements of other Council and other agencies' budgets to create a combined children's services budget in circumstances where there is a clear benefit for schools and pupils in doing so;
- d) in exceptional circumstances only:



- i. to agree an increase in the amount of expenditure the Council can retain from its Schools Budget above that allowed for in the regulations;
  - ii. to agree an increase in centrally retained expenditure within the Schools Budget once a multi-year funding period has begun; and
  - iii. to agree changes to the Council's funding formula once it has been announced prior to the start of a multi-year funding period.
16. Should a judgment be necessary on whether a matter falls within the remit of the Forum, for example whether an item has financial implications, the Council's Head of Service for Finance and Head of Service for Learning and Schools and the Chair of the Forum shall jointly make the necessary determination.
17. There will be a minimum of 4 meetings per year in accordance with the Schools Forum (England) Regulations 2012, however there will usually be 5 meetings per year.
18. For decision-making purposes each Forum member will be entitled to 1 vote. In the case of an equal number of votes for and against a proposal, the Chair shall have a second or casting vote.
19. Where an urgent proposal needs to be considered in advance of a meeting, the Forum may be consulted via post or e-mail.
20. The Constitution and Terms of Reference of the Forum will be reviewed annually.
21. A Chair and Vice-Chair will be elected by the Forum from its voting membership annually or at the first meeting following any resignation. A voting Member who is also an elected Member or officer of the Council may not be elected Chair or Vice-Chair. At any meeting where both the Chair and Vice-Chair are absent, the Forum shall elect, from those voting Members present, a person to take the Chair for that meeting only.

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