

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



please ask for Martha Clampitt
direct line 0300 300 4032
date 4 October 2013

NOTICE OF MEETING

CENTRAL BEDFORDSHIRE SCHOOLS FORUM

Date & Time

Monday, 14 October 2013 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, The Chiltern 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 Rob Watson, Headteacher Stratton Upper School
Non School Members	Mr M Foster, Trade Union 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 MAG 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 previous meeting 24 June 2013 and to receive an update on any matters arising from these.

Consider

Item	Subject	Page Nos.
3	The Issue of Rent as it affects Central Bedfordshire Community Maintained Schools.	* 15 - 20

4	Trade Union and Professional Associations	* 21 - 38
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To seek approval for the continuation of funding for facilities release time for Trade Unions and Professional Association. This would be through de-delegation (where appropriate) for maintained Primary and Secondary Schools. Nursery and maintained Special Schools would be invoiced directly, subject to their agreement to release funds for this purpose.

5	School Funding Reform: Arrangements for 2014/15	* 39 - 100
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To note the update on the Funding Consultation with Schools. To propose the de-delegation of Schools Contingency and an increase to the centrally retained Growth Fund.

Updates

Item	Subject	Page Nos.
6	Dedicated Schools Grant (DSG)	* 101 - 104

To note the update on the Dedicated Schools Grant (DSG).

7	Revised Membership of the Central Bedfordshire Schools Forum	* 105 - 116
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This report advises of the changes to membership of Schools Forums as identified in the Schools Forum (England) Regulations 2012.

CENTRAL BEDFORDSHIRE COUNCIL

At a meeting of the **CENTRAL BEDFORDSHIRE SCHOOLS FORUM** held at Council Chamber, Priory House, Monks Walk, Shefford on Monday, 24 June 2013

PRESENT

Richard Holland (Chairman)
Jim Parker (Vice-Chairman)

School Members: David Brandon-Bravo Headteacher, Parkfields Middle School
Paul Burrett Headteacher, Studham CofE Lower School and Pre-School
Shirley-Anne Crosbie Headteacher, The Chiltern School
James Davis Governor, Leighton Middle School
Angie Hardy Headteacher, Clipstone Brook Lower School
Sharon Ingham Headteacher, Hadrian Lower School

Non-School Members: Mr M Foster Trade Union representative
Caroll Leggatt PVI Early Years Providers Representative
J Reynolds Church of England Diocesan Representative
Sarah Stevens Church of England Diocese Representative

Observer: Cllr M AG Versallion Executive Member for Children's Services

Apologies for Absence: Anne Bell
Sue Howley MBE
Robert Shore
John Street
Stephen Tiktin
Rob Watson

Members in Attendance: Cllrs Mrs S A Goodchild,

Officers in Attendance: Mrs M Clampitt Committee Services Officer
Mr P Dudley Assistant Director Children's Services (Learning & Strategic Commissioning)
Mrs E Grant Deputy Chief Executive/Director of Children's Services
Ms D Hill Senior Finance Manager - Children's Services
Miss H Redding Head of Learning and School Support
Mrs S Tyler Acting Assistant Director, Operational Services, Children's Services

CBSF/13/1 Election of Chairman and Vice-Chairman for 2013/14

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 2013/14.

2. that Jim Parker be elected Vice-Chairman of the Central Bedfordshire Schools Forum 2013/14.

CBSF/13/2 Minutes of the previous meeting and matters arising

RESOLVED

That the minutes of the meeting of the Central Bedfordshire Schools Forum held on 4 March 2013 be confirmed and signed by the Chairman as a correct record.

CBSF/13/3 Schools Specific Contingency Budget

The Forum received and considered a report which provided an update on the Schools Specific Contingency Budget spend and carry forward for 2012/13 and the relative spend to date for 2013/14.

The Senior Finance Officer confirmed as at 31 March 2013 the carry forward from the 2012/13 School Contingency was £851,821 which was split as follows:-

- £778,963 General Contingency
- £72,858 SEN Contingency

The Forum noted that from 2013/14, the Dedicated Schools Grant would be split into three notional blocks: Early Years, High Needs and Schools. Each block would hold its own contingency budget.

Early Years Contingency

The budget allocation for 2013/14 is £352,450. Following the January 2013 census there is an additional £44,200 due to the initial estimated budget being higher than required and the funding returned to the contingency budget. The

balance of the Early Years Contingency for 2013/14 is £396,650 as at 31 May 2013.

High Needs Contingency

The budget allocation for 2013/14 is £348,528, which includes the carry forward from 2012/13 of £72,858. The funding has been set aside to continue the funding of the extended role of a school such as Outreach and other services. There has been a payment of £345 for outreach work. The balance of the High Needs Contingency for 2013/14 is £348,183 as at 31 May 2013.

Schools Contingency

The budget allocation for 2013/14 is £878,963, which includes the carry forward from 2012/13 of £778,963. There has been a DSG adjustment of £3,320 for an additional pupil. The balance of the Schools Contingency for 2013/14 is £882,283 as at 31 May 2013.

The Forum noted that the school's contingency budget would assist schools where expenditure has been incurred which would not be funded from the normal budget. The four areas are as follows:

- (i) schools in financial difficulty
- (ii) the writing-off of deficits of schools which are discontinued, excluding any associated costs and overheads
- (iii) new, amalgamating or closing schools, or
- (iv) other expenditure where such circumstances were unforeseen when initially determining the school's budget share.

Age Range change Schools

The Senior Finance Officer informed the Forum that a number of schools had changed their age range and the result was that funding had not been available to these schools as the budgets for 2013/14 had already been allocated and based on the October 12 census.

There would be a shortfall for a number of schools who had kept Year 5 when it would have normally transferred to a Middle School. The schools in question had contacted the Local Authority (LA) requesting assistance from the Growth Fund. The LA contacted the Education Funding Agency (EFA) to confirm that the criteria agreed with School Forum for Growth Funding distribution was in line with requirements and was not available for schools choosing to change age range.

The EFA further confirmed that for 2013/14 the schools would need to apply to the Schools Forum for funds held in School Contingency as a school facing financial difficulty. In future years the Council would need to apply to the Secretary of State for a variation of the operation of Regulation 13 of the School and Early Years Finance Regulations (pupil numbers).

The LA cannot make adjustments to their formulae after the funding period has commenced, which is why an adjustment for 2013/14 cannot be made.

The Forum were asked to consider how to assist the schools which have been unable to receive funding following age range changes and the government regulations for 2013/14. There were two options presented and the Forum were asked to vote on their preferred choice for the following:-

1. fund the schools from School Contingency for the expected pupil numbers in year group five in September 2013 as a school facing financial difficulty; or
2. support the Schools by way of a Licensed Deficit with no additional funding.

The Forum did not agree with giving Schools a Licensed Deficit when it was not of the schools making.

The Forum were advised that should option 1 be selected the carry forward from 2012/13 would be reduced by approximately £298,555, which equated to a per pupil amount of approximately £8.60.

The Forum voted and chose Option 1.

RESOLVED

- 1. that the Schools Contingency position statement as at March 2013 be noted.**
- 2. that the DSG Contingency spend at 31 May 2013 be noted.**
- 3. that Option 1 be applied to provide support to the schools with age range changes for the funding period 2013/14.**

CBSF/13/4 Two Year old funding

The Forum considered a report which proposed the transfer of the DSG funds allocated by Government for the extension of Two Year Olds to be allocated and managed by the Early Years Childcare Panel and a proportion to be allocated as capital to support the required extension.

The Acting Assistant Director Children's Services informed the Forum that in September 2009, Central Bedfordshire introduced the Funding for free provision for two year olds offer of 10 hours a week, term time only, for 57 children from amongst the 15% disadvantaged two year olds.

In November 2011, Central Government announced the extension to the funding to support 20% of the disadvantaged two year olds (500) and increasing from September 2014 to 40% (1000) for 15 hours a week, term time only.

The hours of provision have increased from 22,230 (2009), 292,500 (2013) and 585,000 (September 2014).

Additional funding has been allocated to Local Authorities to support the delivery. Central Bedfordshire Council has been allocated £348,738 capital funding and £505,547 trajectory funding within the DSG. The Early Intervention Grant had been reduced by a greater amount.

The Forum were asked to agree that the trajectory funding grant to be used for capital projects to provide space for the additional children. The Childcare Funding Panel would allocate the funding as previously.

RESOLVED

That the transfer of authority of £505,547 identified in the DSG notification as Trajectory Funding for the extension of Two Year Old places to the Early Years Childcare Panel, be agreed.

CBSF/13/5

Reimbursement of Maintained Schools Redundancy Payments

The Forum received a report which advised of changes to how redundancy payments would be reimbursed by the Council for Foundation including Trust and Voluntary Aided Schools. It was noted that this change did not apply to Community, Voluntary Controlled or Special Schools where the Council is the Employer.

The Forum were informed that from 1 April 2013, the Schools Finance regulations had changed and the reimbursement of Schools redundancy pay costs must now be met from the Corporate Redundancy Reserve, in accordance with the 2002 Education Act.

Payments from a central fund which schools contribute to cannot be held for redundancy payments.

With effect from 25 June 2013, the Council will no longer reimburse redundancy pay based on calculations using actual weekly pay for Foundation including Trust and Voluntary Aided (VA) Schools. The calculation would now use the statutory maximum weekly pay (currently £430 per week) instead of the actual weekly pay.

The Schools would need to decide as the Employer if they wish to 'top up' the statutory pay to equal the individual's actual weekly pay. Should a School wish to 'top up' the amount would be paid directly from the school's budget as DSG cannot be used to fund this. It is suggested that the decision be taken at a School Governing Body meeting.

It was emphasised in the meeting that this change did not affect Community Schools, Special Schools or Voluntary Controlled (VC) Schools where the Council was the Employer. They would continue to be calculated based on the individual's actual weekly pay.

The Council's decision was made because the Council cannot maintain reimbursing redundancy payments based on actual weekly pay for all Maintained Schools. It was also determined by the Children's Services Management Team that the Council should not fund discretionary payments to non-employees from its reserves.

RESOLVED

1. that the information be noted and ensure that it is disseminated at school level.

2. that Foundation Schools including Trust Schools and VA Schools will each need to decide as individual employers whether they wish to 'top up' statutory redundancy payments so the calculation is based on an individual's actual weekly pay be noted.

CBSF/13/6 Dedicated Schools Grant

The Forum considered a report which provided an update on the Dedicated Schools Grant (DSG). From 2013/14, the DSG would be split into three notional blocks: Early Years, High Needs and Schools.

The School and Early Years Finance (England) Regulations defined the local authority education budgets for the 2013/14 financial year only. The Regulations provided simplified local formulae, greater delegation to schools and new arrangements for funding pupils with high needs.

The Minimum Funding Guarantee (MFG) was set at negative 1.5% **per pupil** for 2013/14.

It was noted that the Chief Finance Officer (CFO), annually signed two statements: the Actual deployment (out-turn) and Budgeted Allocation of the DSG, which confirmed it had been fully deployed in support of the School's Budget in accordance with the condition of the grant and the School Finance Regulations.

Deployment of DSG 2012/13

The final DSG for 2012/13 is £173.915m. This is based on 37,336 (fte number of pupils January 2012) multiplied by £4,658 (Guaranteed Unit of Funding (GUF)). The figure was based on 39 schools converting to Academy status as at March 2013 and £524k LACSEG transfer.

The Forum had agreed that unspent DSG reserves from 2011/12 be distributed to schools as follows:-

- A one-off payment based on degree of incidence of low level needs (£309k)
- An additional amount per statutory pupil (£442k)
- Termly headcount of Early Years (£169k)

The sum of £920k had been added to the 2012/13 DSG allocation.

The Forum noted that the Central Expenditure Limit (CEL) had not been breached during 2012/13.

DSG Budget Allocation 2013/14

The Forum noted that on 19 December 2012, the Department for Education (DfE) announced the Funding settlement for 2013/14. DSG allocations were included along with illustrative allocations for the Pupil Premium of £900 and Service Premium of £300 per pupil. The final allocations would be confirmed in the summer 2013 due to the Pupil Premium being based on the January census.

The DfE announced the Education Services Grant, which replaces the LA Block element of LACSEG for Academies and the corresponding LA revenue funding for 2013/14.

The DSG will continue to be based on the 'spend plus' methodology for 2013/14 but has been shown in three spending blocks (Early Years, Schools and High Needs), as shown in paragraph 14 of the report.

Growth Fund 2013/14

The Forum noted that the Growth Fund was available for two purposes:-

- Expenditure to be incurred due to a significant growth in pupil numbers as a result of the local authority's duty under section 13(1) of the 1996 Act to secure that efficient primary education and secondary education are available to meet the needs of the population of their area, but only where the authority has set criteria for determining the circumstances in which the expenditure can be incurred and the basis for calculating the amount of any such expenditure.
- Expenditure to be incurred in order to make provision for extra classes in order to comply with the School Admissions (Infant Class Sizes) (England) Regulations 2012 (b).

The Forum nominated two members to sit on the panel who reviewed the funding applications. Two meetings had been held (i) considered growth fund bids and (ii) considered infant class size funding applications. The table contained at paragraph 24 of the report detailed the expenditure as at 31 May 2013.

Review of 2013/14 Funding Arrangements

The Review of 2013/14 School Funding Arrangements had been published on 12 February 2013 and views were sought for 26 March 2013 on specific issues. This was followed by the 2014/15 Funding arrangements being announced on the 4th June 2013 which will require a further consultation with Schools. It is proposed the consultation period runs between 4 – 27 September 2013. It was agreed that the consultation would be carried out when schools were in term.

The Technical Funding Group were being asked to convene for two meetings on 16 and 31 July to consider the funding arrangements to inform the consultation process.

RESOLVED

- 1. that the Dedicated Schools Grant (DSG) report be noted.**
- 2. that the Technical Funding Sub Group meet on 16 and 31 July to consider the funding questions.**

CBSF/13/7 Schools Forum Budget

The Forum considered a report which provided an update on the use of the Schools Forum Budget for end of year 2012/13 and to confirm the spend to date for 2013/14. The Forum noted that the £870 balance for 2012/13 had been transferred to the School Contingency budget and carried forward.

The Forum agreed at its meeting on 5 March 2012 (minute no. CBSF/11/46 refers) that a budget of £3,000 of which £1,000 be used to pay for our continuing membership in the F40 group.

The Forum has asked that the Senior Finance Officer apply for an increase to the budget level. It was noted that the last request had been refused but the Forum asked for another request to be made.

RESOLVED

- 1. that the School Forum position statement as at March 2013 be noted.**
- 2. that the School Forum spend to 31st May 2013 be noted.**

CBSF/13/8 Revisions to the Scheme for Financing Schools

The Forum received a report which detailed the directed revisions of 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 1 April 2013, the DfE notified LAs that with immediate effect the following changes were required:

- introduction - update the reference to regulations
- section 1.2.1 - confirmation that legislation has already been amended to put maintained Pupil Referral Units (PRUs) in coverage

- section 1.4 - Only schools forum members representing maintained schools should now approve scheme changes
- section 3 - clarification that place led funding is included in arrangements for payments by instalment
- section 3.1 - clarification that top up payments should be made monthly unless otherwise agreed
- section 4.7 - funding to support schools in financial difficulty can only come from a de-delegated contingency for mainstream schools, or a central budget for special schools and PRUs
- section 5.5 - clarification around bought in meals service, not centrally retained
- section 6 - clarification that schools forum can agree de-delegation
- section 6.2.15 - amended wording in relation to charging the school budget share if appropriate support has not been made for a High Need pupil
- section 8.1 - restriction to existing commitments for redundancy / PRC payments and removal of reference to non-provision of LA services where funding has been provided to some schools only
- section 11.7 - deletion of references to optional delegated funding
- section 12.4 - removal of provision for LAs to retain centrally money for R&M of school kitchens where funding for school meals has not been delegated
- clarification that school detail budgets are no longer included in S251 collection
- restriction of termination of employment costs funded from central schools budget to value of previous year and existing commitments, clarity that contingency for schools in financial difficulty will need to be de-delegated.

RESOLVED

That the amendments to the Central Bedfordshire Scheme for Financing Schools in line with the Department for Education's directed revisions be noted.

CBSF/13/9 School Finance Update

The Forum considered a report which provided an update on the Schools out-turn position for 2012/13.

Central Bedfordshire had 98 schools (excluding Academies) as at 31 March 2013.

The Forum, at its meeting held on 7 March 2011, had resolved that there would be no balance control mechanisms from 2011/12 onwards (minute no. CBSF/10/122 refers). However the Local Authority (LA) would continue to monitor reasons for holding excessive surplus balances.

The Forum noted that the 2012/13 Earmarked Reserves would not be known until after the CFR returns had been filed by schools. The Forum noted that increase in revenue balances were believed to be from 'in year' increases to Individual Schools Budgets (ISB) paid from unspent DSG and preparation for the further changes and impacts of the School Forum Reforms.

For 2012/13 two secondary schools did not submit the Schools Financial Value Standard (SFVS) returns due to issues within their own senior management arrangements. It was noted that the LA would offer assistance to the schools.

RESOLVED

That the Schools out-turn position for 2012/13 be noted.

CBSF/13/10 Outline Forward Plan

The Forum considered a report which provided an update on the likely programme for the next year.

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

The Head of Learning and School Support informed the Forum that the PRU would no longer be in existence from January 2014 but that a report on the alternative provision free school would be brought instead.

RESOLVED

That the forward programme be noted;

CBSF/13/11 Future meeting dates for 2013/14

The Forum noted the following future meeting dates for the 2013/14 municipal year:

- 16 September 2013 at 9.00am in Watling House, High Street North, Dunstable
- 25 November 2013 at 6.00pm in Priory House, Monks Walk, Shefford
- 20 January 2014 at 6.00pm in Priory House, Monks Walk, Shefford
- 24 March 2014 at 9.00am in Watling House, High Street North, Dunstable

(Note: The meeting commenced at 6.00 p.m. and concluded at 7.10 p.m.)

Chairman

Dated

Central Bedfordshire Schools Forum

Contains Confidential or Exempt Information Yes.

Title of Report The Issue of Rent as it affects Central Bedfordshire Community Maintained Schools.

Meeting Date: 14 October 2013

Responsible Officer(s) Dawn Hill; Gezim Leka

Presented by: Jim Smart, Head Teacher, Ridgmont Lower School

Action Required:

1. To reimburse to schools from Schools Forum "Hardship Fund" all rents paid to Landlords by Central Bedfordshire Community Schools. This to apply for one year only in the first instance.
2. To (a) apply(vigorously and on the grounds of fairness and natural justice), and successfully, to National Government for the re-instatement of "Rent" as an allowable element in school budgets. OR (b) For the LA to take on responsibility directly to pay the rent on Leases which they have negotiated with the relevant estates.

Summary

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|-----------|---|
| 1. | <p>1. This paper and proposal is about the issue of who should take responsibility for paying rent to third parties for the privilege of occupying school buildings and land, some of which have been schools for 150 years. The options seem to be:</p> <ul style="list-style-type: none">• The pupils of the schools concerned• The LA through the budget formula(currently not permitted)• The LA directly as signatories to leases. <p>2.It is our submission that to ask the pupils to pay is manifestly unfair and that it is the responsibility of the LA to find another solution. As they have not so far been able to do so, we have submitted the above proposals for your consideration.</p> <p>3.The paper is being submitted to the Forum for immediate action.</p> |
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Background

2.	<p>1. Five Central Bedfordshire Lower Schools have historically paid rent. Ridgmont Lower, Woburn Lower and Husborne Crawley Lower pay to the Bedford Estate; Stondon and Southill Lower pay to the Southill Estate. Of these schools, all except Stondon are party to this paper.</p> <p>2. The amounts involved are:</p> <ul style="list-style-type: none"> • Ridgmont – £11,450 p.a. to Bedford Estates • Husborne Crawley - £6,700 p.a. to Bedford Estates • Woburn - £2,100 p.a. to Bedford Estates & £5,000 p.a. Woburn Education Trust • Southill - £3,800 p.a. Southill Estate <p>3. These amounts were historically always included in our budgets but automatically reimbursed by the LA in similar fashion to Rates.</p> <p>4. For 2013-14, the revised budget formula does not allow for Rent, leaving the schools concerned to pay out of pupil allocated monies. This is manifestly unfair on the pupils concerned. In spite of lobbying and correspondence, no immediate resolution to this problem has been suggested except for the proposal before you. I have attached a copy of an e-mail outlining the current LA position as I understand it.</p> <p>5. In the case of Ridgmont Lower the amount is approximately 4.6% of our budget share or £286.00 per pupil. This is a significant disadvantage. It would pay for a lot of resources or one fifth of a Head Teacher, or the best part of a Teaching Assistant. If the parents were asked to actually pay that money we would very soon close! Although I am told this matter was considered when deciding the Lump Sum figure, in effect our rent money has been shared out between all the pupils in Central Bedfordshire.</p> <p>6. Ridgmont Lower wrote to the Bedford Estate and requested a reduction in rent. This was denied on the grounds that it was a matter between the LA and the school, and that the lease was between CBC and the Estate.</p>
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Detailed Recommendation

3.	<p>We understand that the Schools Forum has a contingency fund set aside to compensate for “hardship” in the budget situations of individual schools. We recommend that pending the time it will take Central Bedfordshire to address the issue formally and propose a solution for 2014-15 which is agreeable to all parties, that the schools concerned be relieved by funds from the funds available to the Schools Forum.</p>
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4.	We do not believe that the only other option, namely for Rent monies to be paid from pupil funds, is a correct way to proceed.
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Source Documents	Location (including url where possible)
Attached e-mail from Dawn Hill to Jim Smart. 23.07.13	n/a

Paper Presented by Jim Smart, Head Teacher of Ridgmont Lower School ,

On behalf of the Pupils, Parents, Head Teachers and Governors of Ridgmont Lower School, Husborne Crawley Lower School, Woburn Lower School and Southill Lower School.

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Jim

As you may already know we are reviewing the factors permitted in our formula in line with the DfE announcements on 14/15 funding arrangements. There will be a further consultation with Schools in September 2013. The School Forum technical funding group have already met (16th July) for the first review of 14/15 arrangements.

The Council had an opportunity at the end of June 2013 to apply for exceptions for 14/15 factors, and we did take that opportunity to make an application in principle, that could inform the discussions with the School Forum . We were aware that the CBC rent factor was not permitted based on 5% of schools and more than 1% of their School Budget Share, therefore our 2nd attempt included an application listing the individual schools in question and asked for them to be considered. The Department accepted 6 of the 9 schools as being exceptional and therefore have agreed the 'in principle' application for those 6 schools for 2014/15.

The School Forum technical group have subsequently also agreed and will be recommending this to the full Forum, once all factors have been reviewed. This will then be included in the consultation document.

I hope that gives you some assurance that we did take your concerns seriously and have tried to help within the restrictions of the regulations.

I apologise that you have not had a formal response to your letter, Gezim and I have seen the letter and forwarded your concerns to the School Forum.

Please come back to me if you need any clarification on this.

Thanks
Best Regards

Dawn

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Meeting: Central Bedfordshire Schools Forum
Date: 14 October 2013
Subject: Trade Union and Professional Associations
Report of: Deputy Chief Executive and Director of Children's Services
Summary: To seek approval for the continuation of funding for facilities release time for Trade Unions and Professional Association. This would be through de-delegation (where appropriate) for maintained Primary and Secondary Schools. Nursery and maintained Special Schools would be invoiced directly, subject to their agreement to release funds for this purpose.

Advising Officer: Catherine Jones, Head of HR Policy and Development, Julia Newbury, Employee Relations & Policy Manager
Technology House, Bedford
Contact Officer: Catherine Jones, Head of HR Policy and Development, Julia Newbury, Employee Relations & Policy Manager
Technology House, Bedford
Public/Exempt: Public
Wards Affected: All
Function of: Council

CORPORATE IMPLICATIONS

Council Priorities:

- Improved educational attainment.

Financial:

1. N/A

Legal:

2. N/A

Risk Management:

3. N/A

Staffing (including Trades Unions):

4. N/A

Equalities/Human Rights:

5. To ensure that any decision does not unfairly discriminate, public authorities must be rigorous in reporting to Members the outcome of an equality impact assessment and the legal duties.

6. Public Authorities must ensure that decisions are made in a way which minimises unfairness, and without a disproportionately negative effect on people from different ethnic groups, disabled people, women and men. It is important that Councillors are aware of this duty before they take a decision.

Public Health

7. N/A

Community Safety:

8. N/A

Sustainability:

9. N/A

Procurement:

10. N/A

RECOMMENDATION(S):

The members of the School's Forum who are entitled to vote are asked:

1. **To agree whether to de-delegate funding from the Lower/Primary School Phase.**
2. **To vote agree whether to de-delegate funding from the Secondary School Phase (Middle & Upper).**
3. **Monies allocated for facilities time to Nursery and Special Schools are not able to be de-delegated by these schools. However, it is recommended that consideration is given by these schools for an allocation of their funding to be used to facilitate release time for trade unions and professional associations. These schools would be contacted and invoiced directly in respect of the cost per pupil as detailed in paragraph 18 (subject to point 4 below).**
4. **To note that the overall cost and the cost per pupil (paragraph 18) is likely to change as a result of the 2013 Pupil Census, trade union membership numbers and the impact of mid year academy conversions.**

Background

11. Union representatives have a statutory right to reasonable paid time off from employment to carry out trade union duties and to undertake trade union training. (Trade Union and Labour Relations (Consolidation) Act 1992). There is also a need for schools to consult with the trade unions in accordance with School Teachers Pay and Conditions.
12. It is recognised that trade unions and professional associations make a significant contribution to the smooth running of schools, both locally and nationally. The funding system for schools should include full recognition of school workforce trade unions, and should enable the effective engagement of school workforce trade unions in local consultation and collective bargaining.

Facilities Funding 2014/15

13. From 2013/14 the Dedicated Schools Grant (DSG) was split into three notional funding blocks:
 - Schools Block
 - Early Years Block
 - High Needs Block
14. The Schools Block includes the delegated budgets of Lower, Middle and Upper Schools. Funding within the Schools Block that is currently retained by the Authority **must** be delegated to schools. However the following exceptions, applicable to Central Bedfordshire, are area's where decisions regarding the de-delegation of funding may be made.
 - (a) Contingencies (including previous amounts for schools in financial difficulties)
 - (b) Staff costs – supply cover (Facilities Time for Union Duties)
15. Consultation has recently been undertaken with Schools with regard to proposed school funding for 2014/15 including the de-delegation of facilities funding for the Lower/Primary and Secondary phases. The decision relating to de-delegation within each phase is to be determined by those members of Schools Forum who represent maintained schools.
16. It is not possible to de-delegate funding from Nursery and Special Schools. As this is the case, these schools will be contacted directly and are able to allocate their 'top up' funding to facilitate the release time for trade unions and professional associations. Those schools indicating their agreement will be invoiced on a cost per pupil basis.

17. Cost of Facilities Funding 2014/15

The estimated total cost for facilities funding for 2014/2015 is £48,240 and the estimated cost per pupil is £3.31. This cost is inclusive of the Lower/ Primary and Secondary phases. The estimated total cost has been calculated by the Finance Department using the actual cost per pupil rate from 2013/14 (£3.31) multiplied by the estimated number of pupils.

18. The number of pupils in schools maintained by Central Bedfordshire Council has been based on the October 2012 census. Schools Forum will be advised of the costs based on the number of pupils in maintained schools as at October 2013 when this is known, along with the impact of academy conversions on these numbers.
19. It is important to note that the overall cost and cost per pupil is also affected by trade union membership numbers. These are currently based on the 2013/14 figures. As such, the cost is likely to change when the figures for 2014/15 are provided in accordance with the current Facilities Agreement (Schools).
20. The costs for representation of employees for the central establishment of the Council is funded through the Council's Central Facilities Agreement.

Trade Union Facilities Agreement – Schools - 2014/15

21. The facilities agreement provides detail on the membership numbers and eligibility of trade unions and professional associations to claim payment in order that schools be able to adequately cover staff time lost. Eight of the recognised Trade Unions and Professional Associations are able to claim as part of this agreement.
22. Consultation is currently ongoing with the recognised Trade Unions and Professional Associations in relation to the earlier collection of membership numbers as a result of changes to the financial reporting timescales by Central Government.
23. The FAQs in Appendix A formed part of the consultation with schools and highlighted the considerations schools would have to make should funding not continue (Q30 -43). For example, the economies of scale of using experienced branch representatives would be lost. Schools would rely on their own individual school based or regional representatives. Involvement of the latter may result in delays in managing processes, whilst the former would require reasonable time off with pay for these duties.
24. Timothy Ramsden, NASUWT Negotiating Secretary has submitted a response on behalf of the NASUWT to Central Bedfordshire proposals to the Schools Forum for 2014-2015 (Appendix B)

- 25 Following the conclusion of the consultation with the Trade Unions and Professional Associations, the receipt of Trade Union Membership data and the receipt of the 2013 Pupil Census data a further report with the re-calculated costs will be presented to the Schools Forum in January 2014
- 26 Members of the Schools Forum are requested to continue to support the work with the Trade Unions and Professional Associations by continuing to agree funding for 2014/15 as recommended in this report.

Appendices:

- A** Retained Facilities Funding Frequently Asked Questions Document
- B** NASUWT response to Central Bedfordshire proposals to the Schools Forum for 2014-2015.

Background Papers: (open to public inspection) None

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School Funding Consultation

Frequently Asked Questions

Basic per pupil entitlement

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

A AWPU and Basic Entitlement are the same thing

Deprivation

2. Q Please can you confirm what IDACI is?

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.

3. Q Can the indices Free School Meals (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 council is able to use a free school meals (FSM) indicator and/or an IDACI rating when distributing funding for deprived pupils.

4. Q Is there any choice on the index used? Can the ACORN index of deprivation used in previous years be used?

A No. The DfE have restricted the deprivation factor to FSM, Ever 6 and IDACI.

5. Q How will the council know which of our pupils are categorised into these various indices?

A Data will be provided by the DfE. Councils are required to use only the DfE data.

6. Q Why IDACI?

A The DfE are enabling Councils 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.

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This means that whilst FSM can be used to target funding at specific pupils who come from deprived families, IDACI allows councils 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.

7. Q The change in methodology for ‘Deprivation’ in 2013/14 meant a 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.

Lump sums

8. Q Can the lump sum be differentiated?

A Councils may set a differentiated lump sum for primary and secondary schools. The maximum permitted value for either phase is £175,000

9. Q Is there any protection for amalgamated schools?

A Where schools are amalgamating, they will retain the equivalent of 85% of two lump sums for the financial year following the year in which they merge. Councils can apply to the EFA to lower this in exceptional circumstances.

10. Q What is the impact on the AWPU value for primary schools of raising the lump sum?

A The council 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 at £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

12. 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 can you investigate some way around this?

A This was not allowable in 2013/2014. The regulations only allow an exceptional item to be applied for when it affects less than 5% of the schools (including Academies) and amounts to more than 1% of the School Budget Share. The council has applied for this exceptional factor for 2014/2015 and the DfE has agreed this for 6 out of 8 schools.

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Central provision of services

13. Q If one or both phases of schools express a wish to de-delegate an element of their budget share does the council have the option to refuse? Can the council 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 council to accept the de-delegation, including charging any necessary administrative costs.

14. 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

15. 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 council may not de-delegate funding even if there was a clear mandate from schools to do so or are there protocols in place based on continued central funding? A 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.

16. Q 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.

Minimum Funding Guarantee (MFG)

17. Q How will the MFG be afforded?

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

18. 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.

19. 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.

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20. 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.

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.

23. Q Will Early Years also be based on the October Census?

A No. Early Years will be based on January counts, e.g 14/15 estimates based on January 13, updated for January 13 in the summer 2014 and adjusted at year end for January 14 count.

Rates

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

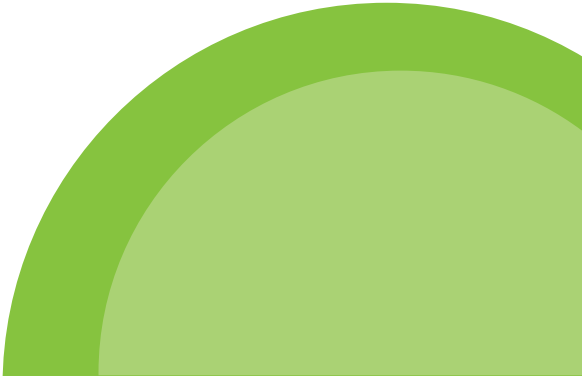
A The total amount of rates funded for all schools would be added together and converted into a per pupil rate and added to the basic entitlement (AWPU). The disadvantage of this would be those school with a high rateable value may not receive sufficient in the basic entitlement to cover the actual cost 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 keep funding in the same way.

PFI

25. 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.

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General

26. Q Can you confirm that the pupil numbers collected in the Autumn School Census 2013 will be used to calculate the funding for 2014/15?

A Yes, the Autumn 2013 census will be used to allocate funding for 2014/15.

27. 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.

28. 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.

29. 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.

Facilities Time

30. Q What is the legal position in relation to trade union facilities time and representation?

A Union representatives have had statutory rights to reasonable paid time off from employment in order to carry out trade union duties and to undertake trade union training since the Employment Protection Act was issued in 1975. Union duties must relate to matters covered by collective bargaining agreements between employers and trade unions and relate to the union representative’s own employer.

In general terms this means that properly appointed trade union representatives are entitled to the following:

Type of union representative	Rights
Union representatives appointed to engage in collective bargaining on behalf of their members. TULR(C)A, 1992	<ul style="list-style-type: none"> ● Paid time off to carry out their duties ● Paid time off for training ● Protection against dismissal or detriment
Union learning representatives appointed to promote learning. TULR(C)A 1992	<ul style="list-style-type: none"> ● Paid time off to carry out their duties ● Paid time off for training ● Protection against dismissal or detriment

<p>Health and safety representatives appointed by trade unions in workplaces where unions are recognised.</p> <p>Safety Representatives and Safety Committees Regulations 1977</p>	<ul style="list-style-type: none"> ● Paid time off to carry out their duties ● Paid time off for training ● Facilities to help them perform their duties ● Protection against dismissal or detriment
<p>Information and consultation representatives.</p> <p>Information and Consultation of Employees Regulations, 2004</p>	<ul style="list-style-type: none"> ● Paid time off to carry out their duties ● Protection against dismissal or detriment
<p>Pension representatives elected for the purpose of consultation over changes to pension arrangements.</p> <p>Occupational and Pensions Pension Scheme Regulations, 2006</p>	<ul style="list-style-type: none"> ● Paid time off to carry out their duties ● Protection against dismissal or detriment
<p>TUPE representatives, where a trade union is recognised for collective bargaining purposes.</p> <p>TUPE, 2006 as amended.</p>	<ul style="list-style-type: none"> ● Paid time off to carry out their duties ● Paid time off for training ● Facilities to help them perform their duties ● Protection against dismissal or detriment
<p>Collective redundancy representatives where a trade union is recognised for collective bargaining purposes. TULR(C)A, 2006.</p>	<ul style="list-style-type: none"> ● Paid time off to carry out their duties ● Paid time off for training ● Facilities to help them perform their duties ● Protection against dismissal or detriment

31. Q What Other documents should I refer to?

A In addition to the statutory position on paid time for trade union representatives and the ACAS Code of Practice, the Conditions of Service for School Teachers (Burgundy Book) and NJC Conditions of Service (Green Book) also provide regulations on this issue.

Appendix III – Agreement on Facilities for Representatives of Recognised Teachers’ Organisations of the Conditions of Service for Teachers (Burgundy book) sets out the collective agreement on facilities for representatives of recognised teachers’ organisations.

Part 2, Section 18 of the NJC Green Book (Non Teachers) outlines the requirement to provide paid time off for trade union representatives to carry out their functions. These

documents provide the framework on which all local authorities are required to base local arrangements for facilities time. Both the Burgundy and Green Book conditions are set out in Annex 1 of this document.

Copies of the relevant sections can be requested from human resources whose contact details are provided at the end of this document

32. Q Which Trade Unions and Professional Associations are recognised by Central Bedfordshire Council?

A The following are recognised by CBC for trade union activities and collective bargaining purposes (but not all receive an allocation) :-

NUT, ATL, VOICE, NAHT, NASUWT, ASCL, GMB, UNISON, UNITE

33. Q What paid time off is a union representative entitled to?

A The ACAS Code of Practice on Time Off for Trade Union Duties and Activities, 2010, which is relied upon in Employment Tribunal hearings, state a reasonable employer will provide paid time off for union representatives for the following activities:

- Collective bargaining
- Working with the management side
- Communicating with union members
- Liaising with the trade union
- Handling individual disciplinary and grievance matters on behalf of employees.

34. Q What is 'collective bargaining'?

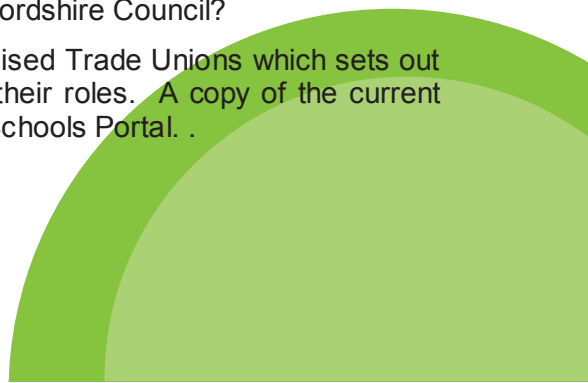
A ACAS advises that the term 'collective bargaining' includes the following activities:

- Negotiating terms and conditions of employment, including hours of work, pay, holidays, sick pay, pensions, learning, equality and diversity, notice and the working environment
- Matters relating to recruitment, HR planning and redundancy or dismissals for whatever reason, including redundancy
- Allocation of work or the duties of employment including job grading, job evaluation, job descriptions, flexible working practices and work/life balance
- Matters relating to discipline
- Representation of members at hearings
- Participation in the negotiation or consultation for an employer and/or multiple employers.

35. Q What are the current arrangements within the Central Bedfordshire Council?

A What are the current arrangements within the Central Bedfordshire Council?

A CBC has a Facilities Agreement (Schools) with the recognised Trade Unions which sets out the agreements reached in order for them to discharge their roles. A copy of the current Facilities Agreement (Schools) can be found on the CBC Schools Portal. .



36. Q Do the trade union representatives in CBC come from the workforce?

A Yes, a paid official may be based in any school within the county and can be called on to represent union members across the sector, for example a union representative working in a secondary school could represent a teacher in a maintained primary school and vice versa.

37. Q Does the employing school of a representative receive re-imburement?

A Yes, the school where the trade union representative is based receives reimbursement from the de-delegated facilities time budget to cover his/her time spent on trade union duties.

38. Q What duties are undertaken and funded in Central Bedfordshire?

A

- regular attendance at formal consultation and negotiating meetings with officers and/or elected members e.g. Education Employee Relations (EER) Working Party etc;
- attendance at policy development meetings with officers e.g. to develop the model HR policies used in schools (recent examples include the appraisal policy; the capability policy etc);
- Attendance at case work meetings with head teachers, governors and others in schools e.g. disciplinary hearings, redundancy consultations, TUPE meetings, etc.

39. Q What are the options in relation to the de-delegation of facilities funding?

A Under the latest reforms to the school funding formula, from April 2013 onwards schools have the following options in relation to trade union facilities budgets:

- a) retain facilities funding in individual school budgets;
- b) de-delegate the funding and assign it to the local authority to hold on behalf of schools.

40. Q If my school wishes to request de-delegation will we retain the current facilities arrangements with access to county representatives and collective bargaining?

A Yes, representatives would continue to work with schools and support their members in schools with employee relation case work e.g. disciplinary hearings, redundancy consultations, TUPE meetings, etc. For all maintained schools consultation on HR policy and practice is undertaken at county level which avoids the need for each school to consult on every issue. Under this approach, model policies and working practices are discussed and agreed with the recognised trade unions, which are then notified to schools and their personnel providers. Governing Bodies are advised to adopt the collectively negotiated policies and procedures to ensure consistent practice in schools across the council

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41. Q What if my school chooses not to de-delegate?

A Experienced local representatives/ branch secretaries would not attend case work meetings as outlined in question 40

Each recognised trade union of CBC represented in a school could decide to appoint a local 'steward', who would be entitled to paid time off to carry out trade union duties. In practice, this could result in an overall increase in the monies paid to the trade unions due to the loss of economies of scale through the work of the county representatives and may lead to inconsistencies emerging in practice between schools.

It is likely that regional officers of the trade unions may wish to attend to particular casework, particularly where locally appointed officers are inexperienced. Therefore, Headteachers and Governors will need to be aware that this may lead to delays in managing the timing of disciplinary, grievance and capability hearings, as regional officers from the trade unions will have limited availability to attend school hearings.

This is also likely to affect discussions over TUPE transfers, school restructures and reductions in staffing, which often require an early response in order to meet teacher notice dates. It is advised therefore that the setting of meetings or planning of consultation processes in relation to the above will need to be arranged in advance of current timescales in order to ensure appropriate representation in accordance with the law is afforded to all employees and trade unions.

You are strongly advised to speak to your HR provider before deciding not to de-delegate.

42. Q Will each school which chooses not to de-delegate be required to enter into a facilities agreement with the recognised trade unions?

A The current funding for facilities time and therefore the facilities agreement that is currently in place will remain until 31st March 2014. Schools whose funding is not de-delegated back to the Council should consider how they plan to manage the facilities time for trade union representatives within their school. It is also advised that schools consider a facilities agreement with the recognised trade unions ahead of the 1st April 2014 when the current arrangements in place with county representatives would come to an end.

43. Q Where can my school receive further advice on this matter?

A It is advised you contact your HR provider to obtain further advice and guidance in relation to consulting with the recognised trade unions on a bespoke facilities agreement for your school.

Should you wish to discuss the information contained within the questions and answers document please e-mail Julia Newbury, Employee Relations & Policy Manager by e-mail to Julia.newbury@centralbedfordshire.gov.uk or telephone 0300 300 5958 or David Waller, Senior Human Resources Manager, Schools Statutory Services david.waller@centralbedfordshire.gov.uk Telephone:0300 300 6053

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Appendix B

NASUWT response to Central Bedfordshire proposals to the Schools Forum for 2014-2015.

This response focuses on the section headed Centrally Provided Services, starting at paragraph 79, and specifically funding for Trade Union Facility Time. It relates to Question 21 but we wish to respond in this form to give an element of explanation.

Facility Time relates to provision in law and ACAS Guidance in order for elected local trade union officers to represent members. While there is entitlement to representation in formal settings (Disciplinary, Capability, Grievance etc) it has often been the case that these emotionally taxing and time-consuming procedures can be forestalled or curtailed through informal involvement by union representatives.

This could involve speaking to, or e-mail correspondence with, a member or school representative. In individual cases it can lead to a matter being resolved without the school even knowing there had been an issue, in others a sense of grievance can be removed by explanation of how policies and procedures work.

A recurring example is the person who feels aggrieved their resignation has not been accepted for the date that they looked for. Explanation of Burgundy Book conditions of service can at least assure the member that there is no individual motive in a decision to stick to resignation dates.

Much of this already takes place outside the school day. However, there are times when a visit to a member at school, or an informal meeting with a headteacher, can clarify matters and prevent a more serious issue arising.

Where more formal procedures are involved, the time to prepare, attend and conduct hearings is vital. Matters can be dealt with more speedily than if Facility time were not available. And it is usually possible to avoid a situation where matters are delayed or exacerbated to the point where solicitors or Tribunals become involved, causing further delays and costs.

The provision of Facility Time for duties is best provided through a dedelegated sum. One nearby authority has tried a system whereby a union representative's school invoices the 'receiving' school for the time a member of their staff spends in the 'receiving' school. It has already proved cumbersome, time-consuming and steps are being taken to try and change things by dedelegation.

It is sometimes suggested that a union's school representatives can take on the role hitherto undertaken by locally elected officers. This has some merit. However, given the union's legal obligation to provide someone of suitable qualification/experience, it means each school would have to provide, and fund, several days for each union's representative to undertake training to a

suitable level (the standard TUC course is 10 days), with refresher training on changes in law and conditions of service in subsequent years.

It is also likely to lead to delays as it takes time for a person taking on this role to acquire appropriate skills and confidence. And they would still need facility time for their work in the school.

It is also sometimes suggested that schools – particularly if they have no recent experience of a major issue – could pay for union time only when they need a lay official for a school case. This has, as said above, led to practical difficulties in another authority. But the main objection is that there is no set time that can be assured as being funded. Therefore a union representative cannot have timetabled Facility Time for the coming year, as it is unknown when, or how much, they will need to be out.

Thus, any time spent on union work would have to come from time when the representative is timetabled to teach, meaning short-term cover with the costs, problems and disruption to teaching that causes. This used to happen up to the 1990s, and was replaced by union officials (particularly local secretaries) having specified times. There is no advantage, and considerable potential educational disadvantage, in going back to a system where union officials, to carry out duties, have to miss teaching time. It is something they, and we believe schools, would find unacceptable.

The dedelegated Facilities Time arrangement is not perfect – quite often a meeting does not match the time a union representative has available. But it is the nearest to a system that allows the advantages of, and requirement for, union support for members and schools without costing specific schools an undue amount, either of money or of disrupted lessons.

Timothy Ramsden
Negotiating Secretary
NASUWT
Central Bedfordshire.

ntative

Meeting: Schools Forum
Date: 14th October 2013
Subject: School Funding Reform: Arrangements for 2014/15
Report of: Deputy Chief Executive and Director of Children's Services
Summary: To note the update on the Funding Consultation with Schools. To propose the de-delegation of Schools Contingency and an increase to the centrally retained Growth Fund

Contact Officer: Dawn Hill, Technology House

Public/Exempt: Public

Wards Affected: All

Function of: Council

Reason for urgency
(if appropriate)

RECOMMENDATIONS:

- 1. To note the responses to the proposed School Funding Consultation 2014/15.**
- 2. To propose to de-delegate £5.63 per pupil for School Specific Contingency for the following phases:**
 - I. Primary Schools**
 - II. Secondary Schools**
- 3. To propose an increase to the Growth Fund of £200,000**

Background

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.
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 with the aim for a transparent, fairer and less complex system. This was followed in March 2012 by a third Consultation 'Next steps towards a fairer system' and built on how a fairer system may be implemented and operated. The final arrangements for 2013/14 were announced on the 28th June 2012.

3. A review of the 2013/14 School Funding Arrangements were carried out by the Department in February 2013. This review intended to understand to what extent there needed to be changes in 2014/15. The final arrangements for 2014/15 were announced on the 4th June and set out the proposed changes to the funding formulae for 2014/15 on which the council must consult with schools and academies.

Funding Arrangements and key changes for 2014/15

4. As in 2013/14 the DSG for 2014/15 will be split into three notional blocks; Schools, Early Years and High Needs. The Schools Block per pupil unit of funding and the Early Years per pupil unit of funding in 2014/15 will remain as in 2013/14. Authorities will continue to be 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.
5. The Schools Block will be based on a per pupil unit of funding of £4,144.47 multiplied by number of pupils as reported on the Schools October 2013 census. The Early Years block will be based on a unit of funding of £3,979.80 multiplied by full time equivalent number of pupils reported on the Early Years January 2013 census.
6. The principal changes to be considered for 2014/15 are as follows:
 - There is one new optional factor for sparsity.
 - There are changes to the lump sum where different lump sums can be agreed for primary and secondary schools (middles getting a weighted average). The lump sum is now capped at £175,000 per school. Where two schools amalgamate the new school will receive 85% of the total of the lump sums of the predecessors for the next full year.
 - The looked after children factor must now apply to any child who has been in care for at least one day.
 - The prior attainment factor has changes in its measurement at Early Years Foundation Stage and Key Stage 2. For EYFS it is 'not achieving a good level of development' for the 2013 cohort; for KS2 it is 'not achieving level 4 in English **or** Maths'.
 - The mobility factor, if used, is now applied when the number of "mobile" pupils exceeds 10% (previously there was no threshold)
 - The basic entitlement for primary pupils (AWPU) must be at least £2000; and for secondary pupils (KS3 and 4) at least £3000.
 - At least 80% of delegated funding must be distributed by pupil-led factors.
 - For 2014/15 there are no constraints on the primary/secondary ratio.
 - In addition to the growth fund, a fund can also be created to cover temporary falling rolls in advance of a population bulge. However, this can only be applied to good or outstanding schools or academies.

- Local authorities can apply for exceptions to be made for:
 - Exceptional premises factors
 - Exclusions from the MFG
 - Changes in pupil numbers as a result of reorganisation or changes in years of admission.
 - Sparsity calculation.
 - Variation to the lump sum for amalgamated schools
 - Changes to regulations regarding School Forum Membership.
 - Schools will be required to fund the first £6,000 for High Needs Pupils (this was the recommended amount in 2013/2014).
7. The DfE will be consulting on setting the place funding value at £10,000 for Special schools and Academies with post 16 pupils. Setting the place value at £10,000 will make this consistent with the place element for pre-16 pupils.
8. All maintained schools and academies must be treated equally when incurring Central expenditure, with the exception of the services that can only be de – delegated for maintained schools.
9. The table below provides a summary of the timetable for implementation of the 2014/15 Funding Arrangements.

When	Activity
30 th June 2013	First window for applications exclusion/variatioins to pupil numbers
13 th August 2013	CBC Executive Report School Funding Arrangements
3 rd September 2013	Overview and Scrutiny Committee – Review consultation and funding arrangements
4 th – 27 th September 2013	Consultation with Schools
30 th September 2013	Second window for applications exclusion/variatioins to pupil numbers
End of October 2013	Councils submit provisional pro-forma to Education Funding Agency.
18 th December 2013	DfE confirms DSG Schools Block for 2014/15
14 th January 2014	CBC Executive to approve the 2014/15 Funding distribution
21 st January 2014	Councils submit final pro-forma to Education Funding Agency.
28 th February 2014	Council issues Individual School Budgets

10. It was agreed at the School Forum meeting of the 24 June 2013 that the Technical Funding sub group would work with officers in preparing the consultation document and financial model which would demonstrate the impact on all schools. Two meetings took place during July 2013, (minutes attached as Appendix A) and the final consultation document (Appendix B and C) and Frequently Asked Questions circulated for input prior to distribution to Schools. The consultation document was launched on the 4 September 2013 with an end date of 27 September 2013.

11. Articles were placed twice in Central Essentials and two sets of e mails were sent to all schools highlighting the consultation process. A Finance surgery was held to allow schools the opportunity to raise questions and address issues facing their individual schools. Attendance was light with only 15 attendees representing 11 Maintained schools and 3 Academies.

Consultation Responses

12. There were 64 individual responses to the consultation process. 3 schools submitted multiple responses and have been counted as 1 for the analyses of results shown in the table below:

	Number of School responses	School in each phase	% Response per phase
Nursery	2	4	50%
Primary	47	95	49%
Secondary	9	33	27%
Special	1	4	25%
Other	2	2	
Total	61	138	44%
Maintained	51	93	55%
Academy	8	43	19%
Other	2	2	100%
Total	61	138	44%

13. The analysis of responses for each question are summarised in the table below, grouping the 'strongly agreed' and 'agreed' together under 'agree' and compared with the 'strongly disagree' or 'disagree'. The full consultation response including additional comments can be found at Appendix D.

No	Question				
		Agree	Disagree	Agree %	Disagree %
6	The base level for the 14/15 AWPU rates should be set at the 13/14 AWPU level	36	9	59%	15%
9	Proposal to include Looked After Children as a factor in the funding formula	40	6	66%	10%
10	The proposal not to distribute funding based on prior attainment	42	9	69%	15%
11	The proposal to exclude English as an Additional Language (EAL) as a factor in the funding	29	14	48%	23%
12	Continuation of one lump sum of £120,000	47	9	77%	15%
13	Continuation of funding schools through a split site factor	20	6	33%	10%
14	Continuation of funding rates on an actual basis	51	2	84%	3%

	Question	Agree	Disagree	Agree %	Disagree %
15	proposal to continue with excluding a Private Finance Initiative (PFI) factor from the funding formula for 2014/15	31	2	51%	3%
16	Proposal to continue excluding pupil mobility as a factor from the funding formula for 2014/15	26	12	43%	20%
17	Proposal to continue funding the joint use agreement	17	0	28%	0%
18	A new rent factor for six CBC schools	21	1	34%	2%
19	Proposal not to include a new scarcity factor for 2014/15	33	6	54%	10%
20	Proposal to cap those schools that gain in order to fund the Minimum Funding Guarantee	47	5	77%	8%
21	Proposal to de-delegate Facilities Time	21	5	34%	8%
22	Proposal to de-delegate School Contingency	24	7	39%	11%
23	Proposal to retain centrally £1,000,000 for the purpose of Growth Fund	38	7	62%	11%
24	Proposal not to retain central funding for the purpose of Falling Rolls	25	12	41%	20%

Protections and limits to gains

14. The pre-16 Minimum Funding Guarantee (MFG) for mainstream schools will continue to be set at minus 1.5% per pupil in 2014/15, continuing with the simplified calculation. This applies to pupils in age ranges 5-16 and therefore excludes funding for early years children and young people over 16.
15. The only factors which are automatically excluded from the MFG are:
 - Post 16 funding (sixth form factor)
 - The lump sum
 - Sparsity factor
 - Rates
16. As there could be significant amounts of protection required as a continuing result of the formula simplification, the Education Funding Agency (EFA) will again allow overall gains for individual schools to be capped as well as scaled back to make it affordable to run the formula. Capping must be applied on the same basis to all schools, so cannot be differentiated by phase. It is applied by the EFA to academy budgets on the same basis as for maintained schools

De-delegation

17. The entire School Block must be delegated to schools with a few exceptions, one of which is where School Forum agrees that a service should be provided centrally. Funds are allocated through the Schools Individual Budget in the first instance. De-delegation only applies to the Maintained sector.

18. Two services for de-delegation were included in the consultation document; Facilities Time (separate paper submitted for consideration) and School Contingency (Closing and re-organising schools, schools in financial difficulty etc).
19. De-delegation is only applicable to Primary and Secondary schools, and therefore the consultation responses have been further analysed below by phase applicable.

Facilities Time	Agree	Neither Agree or Disagree	Disagree	Total
Primary	14	27	2	43
Secondary	3	2	1	6

School Contingency	Agree	Neither Agree or Disagree	Disagree	Total
Primary	18	22	3	43
Secondary	3	1	2	6

20. School Contingency can be retained centrally for maintained schools but only for a limited range of circumstances:
- Exceptional unforeseen costs which it would be unreasonable to expect governing bodies to meet;
 - Schools in financial difficulties
 - Additional costs relating to new, reorganised or closing schools; and,

De-delegation of School Contingency was agreed by School Forum for 2013/14 at a rate of £5.63, total de-delegation £100,000.

21. The amount held has been reviewed to take account of further academy conversions, therefore the amount proposed to be retained for 2014/15 is £82,000, equivalent to the same per pupil amount of £5.63 in 13/14. Any unspent de-delegated funding remaining at the end of the year-end will be reported to Schools Forum. Funding may be carried forward to the following funding period as with any other centrally retained budget, but its use would be subject to the regulations operating in the new financial year.

Growth Fund

22. Funding can be retained from the Schools Block before allocating formula, with the agreement of School Forum, for funding significant basic need 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.
23. Any funds remaining at the end of the financial year must be added to the following year's DSG and reallocated to maintained and academy schools through the formula. Any overspend is similar carried over to the next financial year.

24. Councils need to propose the criteria to the Schools Forum and gain its agreement before funding is allocated. The Council also needs to consult School Forum on the total sum to be top-sliced from each phase. The EFA will check the criteria for compliance with the regulations.
25. The Growth fund should not be used to support schools which are undergoing expansions to meet parental preference through self funded schemes or reorganisations to change the age range and/or admitting additional year groups. The council is expected to apply to vary the pupil numbers in these cases, based on the estimated intake in September.
26. The criteria (Appendix E) for allocating funding through the growth fund as agreed with the School Forum for 2013/14 has not been changed. However, the total sum to be top-sliced needs to be increased to deal with the number of schools expected to increase in size during 2014/15 due to basic need as illustrated in the Councils New School Places Programme. The estimated fund required to be held is £1M across both phases, an increase of £200,000 on 2013/14.

Appendices:

Appendix A: Minutes Technical Funding Sub Group (16th and 31st July 2013)

Appendix B: School Funding Consultation Document

Appendix C: Financial Model

Appendix D: Consultation Responses

Appendix E: Growth Fund Criteria 2014/15

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Minutes of 16th July 2013 Technical Funding Group

Attendees

School Forum Members:

Stephen Titkin (Lower Maintained)
John Street (Middle Academy)
Martin Foster (Trade Union)
Jim Parker (Headteacher Manshead Upper)
David Brandon-Bravo (Headteacher Parkfields Middle)
Shirley Ann Crosbie (Special Maintained)
Rob Watson (Headteacher Stratton Upper)

Officers:

Sue Tyler
Helen Redding
Rob Parsons
Dawn Hill
Gezim Leka
Christine Mushonga

Apologies:

Anne Bell
Richard Holland
Sue Howley

Meeting commenced at 4.00 p.m. and concluded 5.45 p.m.

Handouts Provided:

Slides – School Funding Reform – changes for 2014/15
School Forum paper October 12 (including minutes from Tech Group)
2013/14 School Funding Consultation - FAQ
2012 October 2012 data (Supplied by DfE and must be used for modelling purposes)
2013/14 Factor values for Statistical Neighbours
2014/15 Timetable
Proposed Executive paper for August 2013
Applications to EFA for dis-application of regulations
Modelling

Discussions:

1. Key Points

The session started by highlighting the School funding reform changes for 2014/15:

- LA pro-forma submissions in October 13 and January 14.
- Total of 13 allowable factors, only 11 apply to CBC.
 - i. A Basic per pupil entitlement (Mandatory)
 - ii. Deprivation (Mandatory)
 - iii. Prior Attainment
 - iv. LAC
 - v. EAL
 - vi. Pupil Mobility
 - vii. Sparsity
 - viii. Lump Sum
 - ix. Split Site
 - x. Rates
 - xi. PFI
- Option for LAs to apply for exceptions for Premises factors, Minimum Funding Guarantee (MFG) exclusions, variation to lump sum for

- amalgamated schools and vary pupil numbers due to reorganisation or change in years of admission.
- It was highlighted that DfE expects authorities to request approval to vary pupil numbers, if this is not done the DfE reserves the right to adjust amounts recouped from LAs to properly fund academies affected by this.
 - MFG remains at negative 1.5% per pupil with the same exclusions plus sparsity.
 - One new factor – sparsity, where funding may be targeted at schools that have been identified by the DfE as sparse. Where used, maximum allowable is £100k, but can be flat rate or tapered.
 - LAs permitted to have different lump sums for Primary and Secondary (weighted average for middles) capped at £175k per school.
 - LAC now applies to any child in care for at least 1 day during a specified period.
 - AWPU to be at least £2k for Primary pupils and at least £3k for Secondary pupils. LAs are to ensure that at least 80% of delegated funding is distributed by pupil-led factors. No constraints on the Primary/Secondary ratio.
 - LAs permitted to create fund, in addition to Growth Fund, to cover temporary falling roles (applies to Good or Outstanding Schools only)
 - High Needs providers treated equally when making placements. Mandatory for Schools to meet up to £6k of special needs costs.
 - Consultation process

2. Principles to apply on funding formula 2014/15

The Group discussed AWPU, Statistical Neighbours (SN) data and Lump Sum. A discussion took place on the impact new factors will have on AWPU values. The funding pot will not increase to accommodate new factors which implies a reduction in AWPU. The group looked at data taken from statistical neighbours, from which a mean average has been used as the starting point for modelling purposes. It was noted that the range of unit rates for individual factors is extensive but as no other useful benchmark is available, then modelling should proceed on this basis.

Also the Group agreed the Lump Sum factor was thoroughly discussed for the 2013/14 budget round. It was recognised that once pupil numbers exceed approx 250 that money would be moved away from the larger schools to smaller schools, should the lump sum increase above £120k.

3. Exceptional factors, MFG exclusion and variation of pupil numbers

It was agreed that this agenda item to be discussed at the next Sub Group meeting

4. Models and impact on AWPU

○ LAC

A single unit value may be applied for any child who has been looked after for at least one day during a specified period. The spread of LAC in CBC (106 pupils) is significantly higher under the new criteria. However, the feedback from the group was that most looked after pupils frequently move from one school to the next and that funding rarely follows the child. The largest number of LAC in any one school is 7 (Upper School), with 4 being the largest in both Middle and Lower.

All LAC children automatically qualify for PPG and the consensus was that the funding received for PPG was more than adequate, with some schools struggling to allocate the amounts received.

Models and impact on the AWPU were presented to the Group. The models were based on October 2012 LAC data and Statistical Neighbours unit rates.

It was agreed that LAC will not be recommended to be introduced as a new factor for 14/15.

HR raised concern that if there was a way additional funding could support LAC this should be considered as outcomes for LAC are not where they should be.

○ **EAL**

EAL pupils may attract funding for a maximum of 3 years after the pupil enters the statutory age system. There can be separate unit values for primary and secondary. The school with the largest number of EAL 3 (over 3 years) is Cranfield Lower school which is due to parents at Cranfield University. The group agreed that in general pupils are learning through the medium of English. The other area of impact is also Dunstable (Hadrian, Dunstable Icknield, Watling and St Christophers), however it was noted that these schools do receive funding through the deprivation factor.

Models and impact on the AWPU were presented to the Group. The models were based on October 2012 data and Statistical Neighbours unit rates

It was noted that while demographic growth may change over time, at present there is no effect or change to the need for EAL. The issue will be revisited to accommodate any future changes in demographic profile.

It was agreed that EAL will not be recommended to be introduced as a new factor for 14/15.

○ **Mobility**

Funding may be targeted at schools experiencing pupil mobility - pupils who did not start in Aug or Sep and above a 10% threshold of school population. The data provided showed above 10% mobility in Campton, Derwent and Gothic Mede. These schools receive PPG for Service children so the group considered that there was no real need for a mobility factor. Lawnside in Biggleswade was also discussed. It was also noted that only 3 out the 10 statistical neighbours have a mobility factor.

Models and impact on the AWPU were presented to the Group. The models were based on October 2012 data and Statistical Neighbours unit rates for Mobility factor

It was agreed that Mobility will not be recommended to be introduced as a new factor for 14/15.

○ **Sparcity**

A fixed or variable amount may be applied to small schools where the average distance to pupils' second nearest school is more than 2 miles (primary) or 3 miles

(secondary) as the crow flies. The maximum value for the sparsity factor is £100,000 per school (including fringe uplift)

The general consensus was that this factor is for supporting schools in rural or remote areas and that in comparison to other areas of the country like North Yorkshire, Cumbria, Norfolk etc no CBC schools fall within this category. The consensus was that though some schools may be relatively isolated, all schools are protected by the Lump Sum. Rob Parsons highlighted that any affected schools have the option to submit applications for Infant Class Size funding. The group also felt that introducing the sparsity factor would raise the issue of accountability for funding.

The data provided was discussed and showed distance to the 2nd nearest school. It was also noted that these are as the crow flies measurement and in some cases schools that showed as being below 2miles, should the walking route be taken exceed the 2 mile threshold. Funding amounts per pupil were also provided and showed that CBC small schools are well funded per pupil in comparison to larger schools e.g. school of 53 pupil received £5,201 per pupil in 13/14 compared to a school of 310 pupils receiving £3,200 per pupil.

The measurement to the 2nd nearest school also had a cliff edge approach whereby a school would qualify and is only 0.1 of a mile difference in distance to a school that wouldn't qualify for funding.

It was agreed that Sparsity will not be recommended to be introduced as a new factor for 14/15.

○ **Split Site**

The allocations must be based on objective criteria, both for the definition of a split site and for how much is paid. Only one school qualified in 2013/14 and was funded from September 2013. Should there be no change an additional cost of £50k would be needed for 14/15.

It was agreed that Split site criteria and funding amount be revisited at the next meeting.

○ **Lump Sum**

The lump sum, if used, must apply to all schools, although the value may be different for primary and secondary schools. The upper limit of the lump sum is £175,000 (including fringe uplift)

The group felt that Lump Sum had been adequately discussed for the 2013/14 distribution and that there are no changes to last year's viewpoint.

It was agreed that Lump Sum will be recommended to remain at £120,000 for 14/15.

○ **Rent**

LAs have the option to apply for exceptions to be made for Rent where the impact of cost is more than 1% of a school's total budget and impacts less than 5% of the schools in the area. CBC applied for this exception premises factor in 2013/14 and was disallowed by the EFA.

However, CBC has resubmitted an in principle application to the EFA, along with individual school data for 9 schools. The DfE have confirmed that the Secretary of State intends to approve the application for 6 of the 9 schools.

The group considered the three models presented and the consensus was that a flat rate reduction to AWPU of £1.23 per pupil should be applied to all schools to fund Rent as a new factor.

It was agreed that Rent will be recommended to be introduced as a new factor for 14/15.

5. 2nd meeting of Technical Funding Group – 31st July 2013

It was agreed that the following items will be discussed –

- Split Site – values and criteria
- PFI – rationale for new factor
- Deprivation
- Prior Attainment
- Application to vary pupil number
- Growth Fund criteria and allocation of funding
- Falling Roles Funding
- Consultation process
- Modelling

Glossary of Terms

CBC	Central Bedfordshire Council
MFG	Minimum Funding Guarantee
DfE	Department for Education
LAC	Looked after Children
AWPU	Age Weighted Pupil Unit
KS3	Key Stage 3
KS4	Key Stage 4
PPG	Pupil Premium Grant
EAL	English as an Additional Language.

The next meeting will be held on 31st July 2013 at Priory House, Chicksands.

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Minutes of 31st July 2013 Technical Funding Group

Attendees

School Forum Members:

Stephen Tiktin (Lower Maintained)
John Street (Middle Academy)
David Brandon-Bravo (Headteacher Parkfields Middle)
Anne Bell (Headteacher Willow Nursery)
Richard Holland

Officers:

Helen Redding
Rob Parsons
Dawn Hill
Gezim Leka
Christine Mushonga

Apologies:

Martin Foster
Sue Howley
Rob Watson
Sue Tyler

Meeting commenced at 4.00 p.m. and concluded 6.20 p.m.

Handouts Provided:

Minutes from 16th July Technical Group Meeting
Modelling for Prior Attainment and analysis of 2013/14 Statistical Neighbours values for this factor
Social Deprivation analysis
Split site criteria
Allowable deductions to Schools Block before ISB
Growth fund criteria
Application to EFA to vary pupil numbers in 2014/15 formula funding
Financial Model analysis and assumptions
Note to PPG estimated increase for 2014/15

Discussions:

1. Key Points

The session started with a brief look at the minutes, agreed by email, of the meeting held on 16th July 2013.

The Group went on to discuss the following:

- 4 allowable factors.
 - i. Prior Attainment
 - ii. Deprivation (Mandatory)
 - iii. Split Site
 - iv. PFI
- Allowable deductions to Schools Block before ISB.
 - i. Growth Fund
 - ii. Admissions
 - iii. Schools Forum
 - iv. CLA
 - v. Falling Rolls
- It was highlighted that CBC had submitted an application to the DfE to increase the Schools Forum funding, currently set at £3k. The application was rejected. Reductions to funding are permitted, however, once reduced the budget cannot be increased in future.

- LAs permitted to create fund, in addition to Growth Fund, to cover temporary falling rolls (applies to Good or Outstanding Schools only)
- CLA is now an allowable deduction to Schools Block before ISB. Historically Schools have funded CLA contracts from their ISB. The DfE have now opted to hold a direct contract with the CLA and withdraw funding from the Schools Block.
- CBC submitted an application to the DfE to vary pupil numbers in 14/15 formula funding. 6 Schools required funding in 13/14 (met by the Contingency) for extended age ranges. The methodology submitted in the application was rejected but variation of pupil numbers will be allowed. DfE reserve the right to recoup DSG to fund any academies negatively impacted by age-range changes.
- The financial model was based on the following assumptions:
 - i. Including Rent, total £39,183 as agreed by EFA as an exceptional factor for 6 out of 9 schools, a deduction of £1 on AWPU
 - ii. Increase on Split Site factor £50k for 2014/15, a deduction of £1 on AWPU
 - iii. No change to Social Deprivation (to be discussed), Rates
 - iv. No changes to allowable deduction before ISB (Growth, Admissions, Schools Forum, CLA)
 - v. October 2012 pupil numbers used
 - vi. Adjustment to pupil numbers for High Need places in special provisions
 - vii. No adjustment for change to age ranges
 - viii. MFG at minus 1.5% and Capping at 2.2%
 - ix. High Needs and Early Years funding assumed as in 2013/14
- The Consultation process is due to start on 4th September 2013.

2. Principles to apply on funding formula 2014/15

The Group discussed Prior Attainment, Deprivation, Split Site, Age-range changes and allowable deductions to Schools Block before ISB. A discussion took place on the impact new factors will have on AWPU values. The funding pot will not increase to accommodate new factors which implies a reduction in AWPU. The group looked at data taken from statistical neighbours, from which a mean average has been used as the starting point for modelling purposes.

3. Models and impact on AWPU

○ Prior Attainment

A prior attainment factor may be applied for primary pupils identified as not achieving a good level of development within the Early Years Foundation Stage Profile (EYFSP) and for secondary pupils not reaching L4 at KS2 in either English or Maths. The general consensus was that changes to assessment criteria over the years make the EYFSP data unreliable. Also as this factor allows for extra funding to be targeted at low performing schools (mostly primary) the feedback was that this could be seen as rewarding low attainment.

Models and impact on the AWPU were presented to the Group. The models were based on October 2012 data and Statistical Neighbours unit rates.

The models showed a considerable reduction to AWPU effectively penalising good schools. It was noted that no complaints were received from schools following the decision to exclude Prior Attainment in 13/14. It was further highlighted that the anticipated increase in PPG (£400 per pupil) would suffice in targeting low attainment.

It was agreed that Prior Attainment will not be recommended to be introduced as a new factor for 14/15.

RH raised a query on whether CBC would lose out on extra funding by excluding Prior Attainment. DH confirmed that the DSG pot remains the same for 14/15 and that any new factors will be funded from this pot.

○ **Deprivation (Mandatory Factor)**

Deprivation is measured by free school meals (FSM or FSM6) and/or Income Deprivation Affecting Children Index (IDACI). There can be separate unit values for primary and secondary pupils.

CBC Deprivation for 13/14 was calculated using IDACI data provided by the DfE. A total of 6 bands were applied and funding allocated to any pupil within bands 2-6, with the most deprived pupils attracting higher rates.

Models and impact on the AWPU were presented to the Group. The models were based on October 2012 data and Statistical Neighbours unit rates. The Group noted differences in banding rates between Statistical Neighbours and CBC and highlighted that CBC is not a deprived area and therefore low rates were to be expected.

Where Statistical Neighbours showed considerably higher banding rates it was noted that this could be due to higher GUF rates which mean the corresponding LA would have a larger Deprivation pot to distribute.

The Group also highlighted that apart from the initial queries received during the 13/14 Consultation, no major complaints have since been received regarding the funding change from ACORN to IDACI data. Most schools appreciate that as the LA can no longer use ACORN data the change to a unit rate resulted in the same funding pot being distributed over a larger number of pupils. However, it was noted that it may be too soon to tell if there has been any significant impact on performance.

It was agreed that the Consultation will include a question how the Deprivation funding is spent by schools.

○ **Split Site**

The allocations must be based on objective criteria, both for the definition of a split site and for how much is paid.

The Group discussed making changes to the definition of a split site by removing the 1km measure between two sites. Instead split site would be redefined as a single school, based on two or more sites that do not share a common boundary, where use of the public highway is necessary to travel between each site and where staff teach more than one curriculum subject area each on a daily basis in order to support the principle of a whole school policy.

It was highlighted that the purpose of the Split Site factor is to fund the core costs of a second site (caretaking, basic staff, etc) regardless of pupil numbers. Using the current definition only one out of three schools would qualify for Split Site funding in 14/15 which would disadvantage split sites like that being proposed for Church End. The new definition recognises that in terms of core costs, split sites are effectively separate schools though legally defined as one.

Concern was raised over possible double funding for Split Sites. RP explained that any affected schools would attract one lump sum as a 'normal' school and one lump sum for split site. Schools that amalgamated during the year keep 85% of separate lump sums for one year and receive only one lump sum thereafter.

Only one school qualified for split site in 13/14 and was funded from September 2013. It was noted that the change in definition would not disadvantage any schools. Currently, an additional cost of £50k is required for 14/15 which represents a reduction in AWPUs of £1 per pupil. Under the new definition a further £70k would be required from September 2014 for Church End.

It was agreed that the change in definition of Split Site will be recommended for 2014/15. The change in definition is to be included in the Consultation.

○ **PFI**

The allocations must be based on objective criteria, capable of being replicated for any academies in the authority area. The purpose of the factor is to fund the additional costs to a school of being in a PFI contract, not necessarily the full cost.

The funding gap for CBC is currently paid for by the LA to meet the obligations of remaining PFI contracts. The LA now has the option to include a PFI factor in 14/15 such that the funding gap would be paid for by DSG.

RH declared interest but raised concern over projected figures showing falling rolls. It was noted that it is necessary to seek clarification on the current definition which is rather vague making interpretation subjective. The Group agreed that it would be worthwhile to identify any Statistical Neighbours currently funding PFI through DSG and seek their interpretation of the current definition.

It was agreed that Richard Holland would chase EFA for response on the criteria and definition of PFI. Also it was proposed that more information for LAs that have a PFI to be available for future discussions. The Group also agreed that PFI will not be recommended to be included in the Consultation but that the issue will be revisited next year. This is to be noted in the January 14 Executive Paper.

4. Allowable Deductions to Schools Block before ISB

○ **Growth Fund (£800k)**

LAs may toplice the DSG in order to create a Growth Fund to support schools which are required to provide extra places in order to meet basic need within the Authority, including reopening and reorganisation costs, using an acceptable methodology. The Growth Fund may not be used to support schools in financial difficulty.

The 13/14 budget was £800k. The handout provided showed current spend as c£583k, however, it was noted that there have since been further successful

applications, including two for Infant Class Size funding, for which funding is yet to be allocated. The Growth Fund shows a forecasted overspend for 13/14.

The 13/14 definition states that the Growth Fund is to support schools where the LA commissions new school places to meet demographic need. It may not be used for increase in pupil numbers or changes in age range. RP requested that the definition be altered to include support where a school extends its age range in agreement with the LA.

It was agreed that Schools Finance would draft the changes to the Growth Fund definition and forward a copy with tracked changes to RP. It was also agreed that the amended definition be included in the Consultation FAQ.

The Group agreed that an increase of £200k will be recommended for the Growth Fund for 2014/15. It is estimated that a reduction of £6 on AWPU will be required to meet this increase

○ **Admissions (260,486)**

A deduction to Schools Block before ISB is allowable for Admissions, to fund the statutory elements of the service which includes cost of staffing, training and access to the Tribal system. LAs will need to seek approval from Forums to retain central funding for this service.

RP highlighted that there may be additional charges to fund extra staff where necessary; however, income from Admission Authority Schools mitigates this extra cost. Any unspent DSG retained for Admissions will be added back to the contingency and is recycled to schools.

It was agreed that no changes to Admissions funding will be recommended for 14/15.

○ **Schools Forum (£3k)**

A deduction to Schools Block before ISB is allowable to fund the statutory duty of the Schools Forum. LAs will need to seek approval from Forums to retain central funding for this service.

CBC submitted an application to the DfE to increase the Schools Forum funding for 14/15. The application was rejected. The DfE have advised that no new commitments or increases in expenditure from 13/14 are allowed. Reductions to funding are permitted, however, once reduced the budget cannot be increased in future.

It was agreed that no changes to Schools Forum funding will be recommended for 14/15.

○ **CLA (83,772)**

Following the DfE decision to hold a national contract with the CLA, LAs now have the option to centrally retain funding for the CLA from the Schools Block before ISB. This replaces the previous practice where CLA contracts were funded by ISB.

It was highlighted that this was a DfE decision which applies to all LAs and that the figure of £83,772 is based on pupil numbers.

It was agreed that no changes to CLA funding will be recommended for 14/15.

○ **Falling Rolls**

LAs may topslice the DSG in order to create a small fund to support **ONLY** good or outstanding schools with falling rolls where local planning data shows that the surplus places will be needed in the near future, using an acceptable methodology.

It was highlighted that Falling Rolls are restricted to population increase in 2 or 3 years and affects maintained schools as well as academies. The general consensus was that the criteria would result in unfair treatment where schools predicted growth in 2/3 years but were not considered good or outstanding.

It was also noted that introducing Falling Rolls as a new factor would mean a reduction in AWPU. The impact on schools not recognised as good or outstanding would be that they would lose out on AWPU while also not qualifying for Falling Rolls funding. The Group also raised concern on the calculation of growth rate and agreed it may prove difficult to manage.

It was agreed that Falling Rolls will be reviewed on an annual basis.

5. Financial Model

- The financial model provided was based on October 12 data and assumption mention in paragraph 1.

The model include the deduction on AWPU for increase on split site (£1) and Rent factor (£1), these agreed at the fist meeting of the Group

It was highlighted that pupil number have been adjusted in relation to High Need places for Special Provisions as the funding for those places will come from High Needs Block. In 2013/14 the High Need block was agreed with EAF after the Schools budget were issued so this adjustment wasn't made which resulted in over-funding for schools with High Needs places. The 14/15 formula funding will correctly exclude High Needs places from AWPU funding as they can only be funded from the High Needs Block. It was noted that claw-back is not allowed for 13/14 but that the correction to funding is mandatory for 14/15.

The financial model shows the biggest loss in funding (excluding that caused by the High Needs adjustment) is due to the reduction in MFG. Schools showing an increase in funding were identified as those whose increases were capped in 13/14.

Analysis showed clearly that any predicted loss is due to:

- Schools which received MFG last year, the MFG (amount) this will reduce in 2014/15
- Adjustment to pupil numbers for High Need places
- Combination of the above

Information on the anticipated increase in PPG was also provided with the financial model. The projected increase per school was based on January 12 data as the January 13 data is yet to be released. It was noted that losses in funding shown on the financial model would somewhat be mitigated by the increase in PPG.

- **Application for Age-Range changes.**

CBC submitted an application *in principle* to vary the application of the School and Early Years Finance Regulations 2013 and disapply the use of October census data for specific schools with the intention to more accurately reflect pupil numbers in schools and academies affected by changes of age range. The CBC's application was presented to the group.

The DfE has responded by conferment that the Secretary of State intends to approve our application in principle. However the DfE has stated that it will not be possible to adjust the pupil numbers in year and they are looking for a more sophisticated method of pupil numbers estimates. The DfE also state that they reserve the right to recoup DSG from the LA to fund any academies negatively impacted by age-range changes. However, they have not disclosed the methodology to be used in calculating any recoupment.

The Group agreed that funding should follow the pupil but the general consensus was that schools currently have to wait a year for funding to catch up with pupil numbers (September intake for example.) It was noted that schools don't always change age ranges out of choice and so should not be penalised but that there should be a clear and consistent methodology for calculating funding for affected schools.

It was suggested that funding be calculated on a basis of 50% for places normally expected to move to Year 5 or Year 7. The consensus was that Middle schools would be hardest hit and that timing differences could make this option impractical.

DH highlighted that LAs do not have the option to centrally retain funding for academy recoupment and stressed the importance of preparing a model for maintained schools. 6 schools extended age ranges in 13/14 and required funding from the contingency.

The Group concluded that further discussion on age-range changes were required.

It was agreed that Schools Finance would seek clarification from the DfE on whether or not age-range changes must be included in the consultation. Since then the DfE has replied to the above question as below,

The Regulation 9(2) of the School and Early Years Finance Regulations require LAs to consult their schools forum and schools about any proposed changes to the formula, in relation to the factors and criteria taken into account, and the methods, principles and rules adopted. So, clearly you would need to consult with schools on this although the method and timing are not specified in Regulations. We would also expect consultation to inform the decision making process, rather than occur after a final decision has been reached. We would hope that consulting with schools on the options available to you in this area would prove helpful to the Subgroup, and ultimately the LA, in making the decision on the formula.

Glossary of Terms

DfE	Department for Education
ISB	Individual School Budget
PPG	Pupil Premium Grant
CLA	Copyright Licensing Agency
CBC	Central Bedfordshire Council

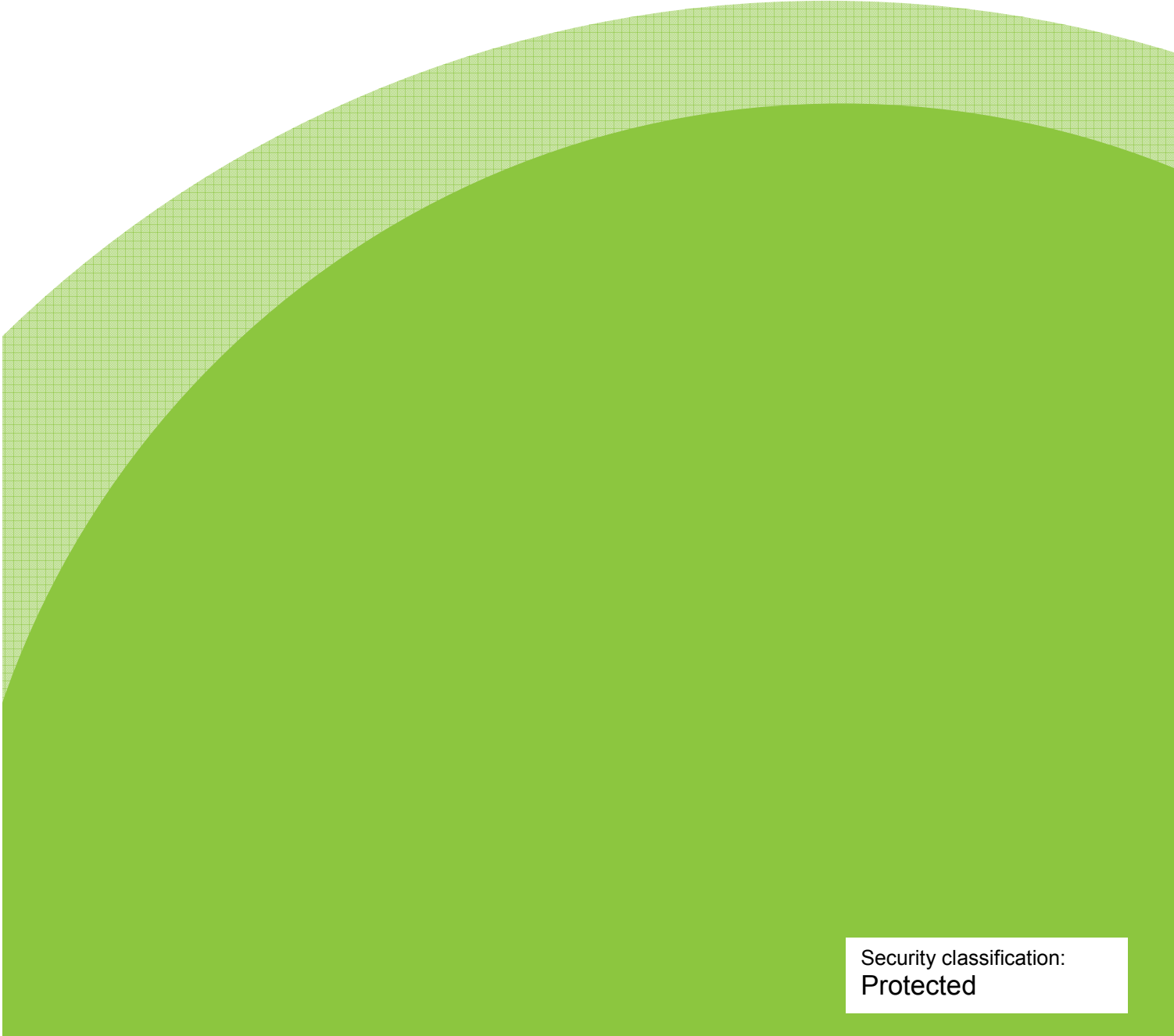
AWPU	Age Weighted Pupil Unit
L4	Level Four
KS2	Key Stage 2
RH	Richard Holland
DH	Dawn Hill
DSG	Dedicated Schools Grant
FSM	Free School Meals
GUF	Guaranteed Unit of Funding
ACORN	A Classification of Residential Neighbourhoods
LA	Local Authority
RP	Rob Parsons
PFI	Private Finance Initiative
FAQ	Frequently Asked Questions
MFG	Minimum Funding Guarantee



**Central
Bedfordshire**

Proposed School Funding for 2014/15

Consultation document



Security classification:
Protected

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Please read this consultation document and then answer the questions on our proposals for school funding in 2014/2015 by completing our [online form](#). Paper copies of the form are available on request by contacting Gezim Leka on gezim.leka@centralbedfordshire.gov.uk or 0300 300 6162.

All responses must be received by Friday, 27 September 2013.

Introduction and key changes

1. The Department for Education (DfE) has carried out a review to understand how the changes introduced to funding arrangements for schools in 2013/14 have been implemented. In light of the findings, changes will be made to the funding distribution for 2014/15.
2. The 2014/15 Funding Arrangements were announced on 4 June 2013, and set out the proposed changes to funding formulae for 2014/15 on which the council must consult with schools. These changes are seen by the DfE as a further development of the 2013/2014 arrangements. This document explains the main changes and specific proposals for Central Bedfordshire.
3. We are keen to hear your views before we make our final decision on the funding arrangements for 2014/2015. You will notice that we have included questions throughout this document to support you in thinking about these changes. To find out how you can respond to these questions, please read the consultation section at the end of this document.
4. A new optional factor for 'sparsity' has been introduced, which is aimed at supporting necessary small schools, mainly in rural areas. Specific criteria have been drawn up by the DfE to control how this factor operates. Further details can be found in paragraph 66. Where a sparsity factor is used by a council, the maximum allowable value is £100,000 per school. According to the data provided by the DfE, if this is applied, it only impacts on four schools in Central Bedfordshire.
5. The council can now choose to have different lump sums for Primary and Secondary (with middle schools getting a weighted average). This is capped at £175,000 per school. In the 2013 consultation process the maximum lump sum value was £200,000.
6. Where schools are amalgamating, the amalgamated new school will receive 85% of the total of the combined lump sum but only for the following financial year.
7. If a factor for Looked After Children is applied in a council's funding formula this must now apply to any child who has been in care for at least one day, whereas in the past this was set at six months.
8. The new guidelines change the way prior attainment factor is measured at the end of the Early Years Foundation Stage (EYFS) and Key Stage 2 (KS2). The new measures are:
 - EYFS – not achieving a good level of development (2013 cohort)
 - KS2 – not achieving level 4 in English or Maths for all cohorts.

9. The mobility factor if used can now only be applied when the number of 'mobile' pupils exceeds 10%. No threshold was set for 2013/14.
10. The basic entitlement for primary pupils (the Age Weighted Pupil Unit - AWPU) must be at least £2,000, and for secondary pupils (KS3 and KS4) at least £3,000. Central Bedfordshire figures for 2013/14 were well within these parameters.
11. Councils must ensure that at least 80% of delegated funding is distributed via pupil led factors (in Central Bedfordshire in 2013/14 it is 87%). There are currently no constraints on the Primary/Secondary ratio proposed in the latest guidelines but limits may be introduced in the future.
12. The 2013/14 guidelines required the creation of a Growth Fund to be used to resource demographic increases in basic need. This was agreed at £800,000. The new guidelines state that with the agreement of the Schools Forum, councils can now create a fund to cover temporary falls in a school's roll. This can only be applied to schools that have been judged by Ofsted to be 'good' or 'outstanding'. Schools Forum must also agree the criteria by which this will be applied and be consulted on allocations. This factor can only be applied if it relates to local place planning decisions and cannot be used to support unpopular or failing schools
13. The Operational Guidance for 2014/15 provides information regarding financing schools that are planning to change their age ranges. Councils are now able to request approval to vary the pupil numbers for specific schools where:
 - there has been, or is going to be, a reorganisation; or
 - a school has changed, or is going to change, its age range either by adding or losing year groups.
14. In these cases, a weighted average of pupil numbers can be used, taking into account the changes in pupil numbers from the new academic year. Due to the 'school-driven' nature of the age range changes in Central Bedfordshire where numbers will continue to be affected by parental preference, the council will need to apply for a variation in pupil numbers for specific schools for the funding period 2014/15. Councils' budgets will be adjusted to recoup budget so that the Education Funding Agency (EFA) can fund affected Academies.
15. There is a change to the membership in the Schools Forum Regulations. They now require one member from an institution that provides education to 16 – 19 year olds. This replaces the member from the 14-19 Partnership. The representative from the University Technical College (UTC) can continue to fulfil this role.
16. The council is now able to apply for exceptions from the finance regulations in relation to:
 - Premises factors
 - Minimum Funding Guarantee
 - Changes in pupil numbers as a consequence of reorganisation or changes in years of admission
 - Sparsity calculation
 - Variation to lump sum for amalgamated schools.

17. Schools will be required to fund the first £6,000 for High Needs Pupils. Central Bedfordshire agreed this figure when it was recommended for 2013/14 following consultation with schools.
18. The DfE will be consulting on setting the place value at £10,000 for Special Schools and Academies with post 16 pupils. This is currently split into two elements of £6,000 and £4,000. Setting the place value at £10,000 will make this consistent with the place element for pre-16 pupils.
19. All maintained schools and Academies must be treated equally when incurring central expenditure, with the exception of the figure that can only be de-delegated for maintained schools.
20. Pupil Premium will remain a separate grant in 2014/15 and will raise to £1,300 per pupil eligible for Free School Meals (in the last six years) for Primary and Looked After Children. The Secondary premium has not yet been announced. Service children (in the last two years) receive £300.
21. The table below provides a summary of the timetable for implementation of the 2014/15 Funding Arrangements.

When	Activity
30 th June 2013	First window for applications exclusion/variatioins to pupil numbers
16 th and 31 st July 2013	School Forum Technical Funding Group Meetings
13 th August 2013	CBC Executive Report School Funding Arrangements
3 rd September 2013	Overview and Scrutiny Committee – Review consultation and funding arrangements
4 th – 27 th September 2013	Consultation with Schools
30 th September 2013	Second window for applications exclusion/variatioins to pupil numbers
End of October 2013	Councils submit provisional pro-forma to Education Funding Agency.
18 th December 2013	DfE confirms DSG Schools Block for 2014/15
14 th January 2014	CBC Executive to approve the 2014/15 Funding distribution
21 st January 2014	Councils submit final pro-forma to Education Funding Agency.
28 th February 2014	Council issues Individual School Budgets

Proposed Formula Factors for Distributing the 2014/15 Schools Block

Mandatory Factors

Basic per-pupil entitlement (AWPU)

22. This is a compulsory funding factor that assigns funding to individual pupils based on the October pupil census.
23. In 2013/14 funding was allocated according to age weighted pupil unit (AWPU), with different rates for Primary and Secondary (where there could be different rates for KS3 and KS4).
24. In 2014/15 a minimum value of £2,000 for Primary and £3,000 for Secondary (KS3 and KS4) has been set.
25. Central Bedfordshire Council and the School Forum believe that to set a minimum value strengthens the principles that the funding formula should be pupil led. It is proposed that there is no change to the 2013/14 AWPU rates other than to fund those factors that have not previously been included or to increase the centrally retained Schools Block where this has been agreed.

Question: How far do you agree or disagree that the base level for the 2014/15 AWPU rates should be set at the 2013/14 levels? (Please answer Q6 on the consultation response form).

Deprivation

26. This is a compulsory factor. In 2013/14 councils could choose to use free school meals and/or the Income Deprivation Affecting Children Index (IDACI) to distribute deprivation funding. There could be separate unit values for Primary and Secondary and it could be weighted for IDACI data.
27. Both indicators direct funding through a unit rate per deprived pupil.
28. Central Bedfordshire Council and the School Forum propose no change to the methodology or unit rates for the distribution of the 2014/15 funding. However, they would like to seek views on how the deprivation funding has been applied in 2013/14.

Question: How has your School's deprivation funding been applied in 2013/14? (Please answer Q7 on the consultation response form).

1. It has been absorbed within the overall budget
2. It has supported deprived pupils in addition to the Pupil Premium

If you said 'It has supported deprived pupils in addition to the Pupil Premium', is the impact of this spend evaluated by the Governing Body?

(Please answer Q8 on the consultation response form if applicable).

Optional factors

29. Any funding used for optional factors that are not currently in use would be deducted from the basic entitlement (AWPU).

Looked After Children (LAC)

30. In 2013/14 Central Bedfordshire Council did not direct funding through this optional factor as concerns were raised regarding movement of pupils between schools and the funding not following the pupil. This factor used the March return completed by councils each year, mapped to schools using the January school census. Councils had a choice to select one of three indicators. It was agreed to exclude LAC as a factor for 2013/14 as it could not be proven to target individual pupils changing schools at any time during the academic year.
31. For 2014/15 only one indicator will be allowed, which is all those who were being looked after on 31 March 2013, regardless of how long they have been looked after. This provides consistency in the movement to a National Funding Formula. Evidence shows that children who have been looked after for one day are equally as likely to underperform at KS4 as those looked after for 12 months.
32. The spread of LAC across Central Bedfordshire schools (106) is significantly higher under the new criteria and would impact 48 schools.
33. Central Bedfordshire Council would like the inclusion of this factor to be considered, as data shows that these pupils underperform, and all available additional support should be provided in order to improve outcomes for LAC.

**Question: How far do you agree or disagree with the proposal to include Looked After Children as a factor in the funding formula?
(Please answer Q9 on the consultation response form if applicable).**

Prior Attainment

34. In 2013/14 Central Bedfordshire Council did not direct funding through this optional factor. It acts as a proxy indicator for low level high incidence special educational needs, with the Primary indicator for 2013/14 based on the Early Years Foundation Stage Profile (EYFSP) and Secondary indicator based on the number of pupils not achieving level 4 in English and Maths at KS2.
35. For 2014/15 the Primary indicator will include those who failed to achieve a good level of development for the cohort of pupils in the 2013 assessments. This will only apply to this cohort; for older year groups in the school EYFSP will apply. The Secondary indicator will be based on the number of pupils not achieving level 4 in English or Maths.
36. Central Bedfordshire Council and the School Forum propose that there should be no change to 2013/14. Changes to the assessment criteria make the data unreliable. It is felt that introducing this factor could be seen as allowing extra funding to be targeted at low performing schools rather than underperforming pupils, therefore rewarding schools for their poor performance.

**Question: How far do you agree or disagree with the proposal not to distribute funding based on prior attainment?
(Please answer Q10 on the consultation response form if applicable).**

English as an Additional Language (EAL)

37. In 2013/14 Central Bedfordshire Council did not direct funding through this optional factor. Pupils with English as an additional language could attract funding for up to three years after they enter the statutory school system. Councils could choose to use indicators based on one, two or three years. There could also be separate values for Primary and Secondary.
38. There is no change to these criteria for 2014/15.
39. The table below shows the number of pupils where English is an Additional Language and the years the pupil enters the statutory school system.

Number of Years in statutory Education	Lower	Middle	Upper
1st	243	32	8
2nd	423	68	17
3rd	570	84	24

40. The school with the largest number of pupils with EAL is in an area where their parents are at the local University, with the pupils achieving well and learning through the medium of English. The other areas of impact are mostly deprived and are already in receipt of funding through the Deprivation factor. While demographic growth may change over time, at present there is no effect or change to the need for an EAL factor. This can be revisited to accommodate any future changes in demographic profile.
41. Central Bedfordshire Council and the School Forum propose not to include a separate funding factor for EAL.

**Question: How far do you agree or disagree with the proposal to exclude English as an Additional Language (EAL) as a factor in the funding formula?
(Please answer Q11 on the consultation response form if applicable).**

Lump sum

42. This is an optional factor although it is used by all local authorities. The purpose of the lump sum is to provide all mainstream schools (including Academies but not including Special Schools), irrespective of size, with a contribution to the basic costs of operating a school. This had to be a single value applied to all schools with the maximum set at £200,000. Following consultation the lump sum for 2013/14 was set at £120,000.
43. For 2014/15 Councils can set different lump sums for Primary and Secondary with a maximum level set at £175,000. The maximum level has been reduced as a sparsity factor is now available. Where schools amalgamate they will retain 85% of

the total lump sums in the year after the amalgamation, rather than reducing to one lump sum immediately. The change responds to concerns that a single lump sum did not recognise the differences in school size between phases, and removes the previous financial disincentive to amalgamate.

44. Extensive modelling had been carried out to inform the 2013/14 lump sum value and illustrated higher lump sum amounts adversely affecting larger schools.
45. Central Bedfordshire Council and the School Forum propose no change to the 2013/14 lump sum value of £120,000.

Question: How far do you agree or disagree with the continuation of one lump sum of £120,000?

(Please answer Q12 on the consultation response form if applicable).

Split sites

46. In 2013/14 Central Bedfordshire Council agreed to fund schools through a split site factor. The purpose of this factor was to support schools which have unavoidable extra costs because they have a split site. The allocation was based on objective criteria, both for the definition of a split site and for the amount funded. The EFA checked the definition submitted to ensure it was objective and transparent, and easily applied to Academies. This only applied to one school in 2013/2014 (Greenleas Lower School) and only from September 2013.
47. The proposed definition of a split site for 2014/15 is 'a single school, based on two or more sites that do not share a common boundary, where use of a public highway is necessary to travel between each site and where staff teach more than one curriculum subject area on a daily basis in order to support the principle of a whole school policy.'
48. Note: Federated schools are not eligible for this factor as they remain separate schools receiving individual delegated budgets for each within its federation and therefore each retaining a lump sum.
49. Central Bedfordshire Council and the School Forum propose to continue to allocate an additional lump sum (£120,000) to those schools meeting the definition of a split site. This will be revisited in future years as more schools may merge and work across more than one site.

Question: How far do you agree or disagree with the continuation of funding schools through a split site factor?

(Please answer Q13 on the consultation response form if applicable).

Rates

50. This is an optional factor but used by all councils in 2013/14. It is funded on the basis of actual costs; Academies are reimbursed by the EFA separately from the main budget allocation.
51. There are no changes proposed for 2014/15.

Question: How far do you agree or disagree with the continuation of funding rates on an actual basis?

(Please answer Q14 on the consultation response form if applicable).

Private Finance Initiative (PFI) contracts

- 52. There is not currently a Private Finance Initiative (PFI) factor within the local formula. The purpose of this factor is to support schools which have unavoidable extra premises costs because they are a PFI school and/or to cover situations where the PFI 'affordability gap' is delegated and paid back to the local authority.
- 53. The funding gap for Central Bedfordshire's two PFI schools is not met by DSG contributions, as it is in many councils, but paid from the council's core funding that it receives through revenue support grant. It is not a requirement to delegate the PFI affordability gap as this can continue to be funded outside of the DSG.
- 54. Central Bedfordshire Council and the School Forum propose not to introduce a factor for PFI for 2014/15. However, it is recognised that this may need to be reconsidered in the future should the pupil numbers reduce to a figure below that specified in the contractual obligation, causing the schools additional costs in accordance with paragraph 51 above.

Question: How far do you agree or disagree with the proposal to continue with excluding a Private Finance Initiative (PFI) factor from the funding formula for 2014/15?

(Please answer Q15 on the consultation response form if applicable).

Pupil Mobility

- 55. In 2013/14 Central Bedfordshire Council did not fund schools through a Pupil Mobility factor. This measure counted pupils who entered the school in the last three academic years, but did not start in August or September (or January for reception pupils). There could be separate unit values for Primary and Secondary.
- 56. For 2014/15 there is a 10% threshold so schools will only qualify for the measure if more than 10% of their pupils are counted as mobile. Funding would be allocated based on the proportion above the threshold e.g. if a school has 12% mobility, then 2% of its pupils would attract funding.
- 57. There were concerns raised in the consultation for 2013/2014 that the previous measure spread funding too thinly. The change enables greater targeting of those schools with the most mobile populations.
- 58. The table below shows the number of pupils in Central Bedfordshire Schools that were admitted to schools outside of the timelines specified above and applies the 10% threshold. The school level data has been provided by the Department for Education and is based on the academic year 2012/13.

Lower	Middle	Upper	Total
145	21	0	166

59. The issue of mobility in Central Bedfordshire has only been raised previously in relation to service children. This particular group of pupils will not be specifically targeted by this new threshold. In addition, service children receive Pupil Premium Grant.
60. Central Bedfordshire Council and the School Forum propose not to include a new factor for 2014/15 for pupil mobility given that it is not targeted at any particular group of pupils where mobility may be an issue.

**Question: How far do you agree or disagree with the proposal to continue excluding pupil mobility as a factor from the funding formula for 2014/15?
(Please answer Q16 on the consultation response form if applicable).**

Dedicated School Grant (DSG) spent on Post 16 pupils

61. This is an optional factor but can only be used where the local authority used such a factor in 2013/14. It is a per pupil factor which continues funding for post-16 pupils up to the level that the council provided in 2012/13. Central Bedfordshire Council did not provide Dedicated School Grant for this purpose in 2013/14 and therefore a factor it is not permitted going forward.

Exceptional premises factors

62. In 2013/14 councils could apply to the EFA to use exceptional factors relating to premises. This had to relate specifically to premises costs. Councils were advised that applications should only be submitted where the extra factor would be more than 1% of a school's budget and covered fewer than 5% of the schools in the authority's area,
63. Central Bedfordshire Council made an application for those schools having to pay rent or a joint use agreement for their premises for curriculum use. The EFA approved the application regarding joint use but declined the rent application.
64. For 2014/15 CBC have applied 'in principle' in the first window for applications to the EFA for exceptional premises factors relating to both joint use and rent. The EFA have confirmed that the Secretary of State intends to approve the application for both joint use and rent (rent has only been approved for six out of the nine schools applied for). The three schools that were declined because they were well below the 1% threshold of school budget share.
65. Central Bedfordshire Council and the School Forum propose the continuation of funding the joint use arrangement and the inclusion of a rent factor for those schools as approved by the Secretary of State.

**Question: How far do you agree or disagree with the proposal to continue funding the joint use arrangement?
(Please answer Q17 on the consultation response form if applicable).**

**How far do you agree or disagree with a new rent factor for six CBC schools?
(Please answer Q18 on the consultation response form if applicable).**

Sparsity Factor

66. This is a new optional factor introduced by the DfE for 2014/15. The DfE has identified the nearest school to pupils' home addresses. For each school, the average distance as the crow flies to those pupils' second nearest school has been calculated by the DfE. Schools can only qualify for sparsity funding if this distance is greater than two miles for Primary and three miles for Secondary and if they have fewer than 150 pupils for Primary or 600 for Secondary.
67. Councils can narrow the criteria (set at a greater distance or smaller maximum distance). The maximum amounts which can be allocated to an individual school through this factor is £100,000. Councils can also choose whether to use a single amount for all sparse schools, or to use a tapered amount which increases the smaller the school.
68. Should this factor be introduced, only four Central Bedfordshire schools would attract funding.
69. Central Bedfordshire Council and the School Forum propose not to include sparsity as a new factor for 14/15. The general consensus is that this factor is for supporting schools in rural or remote areas like North Yorkshire, Cumbria and Norfolk. Although it was recognised that some schools may be relatively isolated, all schools are protected by the lump sum. The measurement to the nearest school also has a 'cliff edge' approach whereby a school would qualify and be only 0.1 of a mile difference in distance to a school that would not qualify. The distances are also as the crow flies and do not take account of a walking route, which may be further.

**Question: How far do you agree or disagree with the proposal not to include a new sparsity factor for 2014/15?
(Please answer Q19 on the consultation response form if applicable).**

Protections and limits to gains

70. The pre-16 Minimum Funding Guarantee (MFG) for mainstream schools will continue to be set at minus 1.5% per pupil in 2014/15, continuing with the simplified calculation. This applies to pupils in age ranges 5-16 and therefore excludes funding for early years children (see Early Years section below) and young people over 16.
71. The only factors which are automatically excluded from the MFG are:
 - Post 16 funding (sixth form factor)
 - The lump sum
 - Sparsity factor
 - Rates
72. As there could be significant amounts of protection required as a result of the formula simplification, the Department for Education allows overall gains for individual schools to be capped as well as scaled back to make it affordable to run the formula.

73. Capping and scaling must be applied on the same basis to all schools and cannot be differentiated by phase. It is applied by the EFA to Academy budgets on the same basis as for maintained schools.
74. Capping and scaling must not be applied to schools which have opened in the last seven years and have not reached their full number of year groups.
75. A commitment has been made that MFG will continue beyond 2014/15 but it is not possible to confirm at what level, as this is subject to the outcomes of the spending review.
76. Central Bedfordshire Council and the Schools Forums have considered the options and propose to cap those schools that gain in order to fund the MFG for those schools that lose.

**Question: How far do you agree or disagree with the proposal to cap those schools that gain in order to fund the Minimum Funding Guarantee?
(Please answer Q20 on the consultation response form if applicable).**

Proportion allocated through pupil led factors

77. For 2014/15 Councils must allocate at least 80% of the delegated schools block funding through pupil-led factors. In 2013/14 CBC funded 87% of the schools block through these factors. The proposals in this consultation and accompanying financial model demonstrating the effect of these proposal targets 87.88% of funding through the pupil led factors.

Primary/Secondary ratio

78. There will not be a Primary/Secondary ratio at this stage but they have not been ruled out for future years. The ratio for Central Bedfordshire assuming the proposals in the financial model is 1:1.30.

Centrally Provided Services

79. The 2013/14 reforms significantly reduced the number of centrally held budgets within the schools block. There are two groups that central services fit into:-
 - De-delegated Services. These have to be allocated through formula but can be de-delegated for maintained primary and secondary schools.
 - Centrally Retained Services. These can be centrally retained before allocating the formula with the agreement of the Schools Forum and include; Funding for pre-16 pupil growth and infant class size, Funding for falling roles and Copyright Licensing Agency (CLA) and Music Publishers Association (MPA) licenses. In addition Admissions and Servicing of Schools Forum are permitted, however, no new commitments or increases in expenditure are allowed from 2013/14.
80. The following services were delegated in 2013/14 but were able to be de-delegated from the Primary and/or Secondary maintained schools budget subject to a Schools Forum decision by the representative of each sector. **De-delegation is not an option for Academies, Special Schools, Nurseries or PRU's.**
 - Facilities Time (Union representation at meetings etc) and

- Schools Specific Contingency (Closing and re-organising, Schools in financial difficulty etc)

81. Any unspent de-delegated funding remaining at the year end is reported to the School Forum. Funding may be carried forward to the following funding period but its use is subject to the regulations operating in the new financial year.
82. The de-delegation provision is available in 2014/15 and arrangements need to be reviewed as decisions on de-delegation were for 2013/14 only.
83. The table below represents the maintained school contribution in 2013/2014

Services	Distributed through formula factor	Total Value	Per-pupil
Facilities Time	Basic entitlement	£58,829	£3.31
School Specific Contingency	Basic entitlement	£100,000	£5.63

84. Although maintained Nurseries and Special Schools could not be part of this arrangement, they agreed to pay into facilities time from their budgets at the same rate as other schools.
85. The per pupil unit rate will be calculated on the pupil numbers in maintained schools following the October 2013 census. The table below estimates the cost per pupil for 2014/15 and has taken into account any proposed Academy conversions prior to the 1 April 2014. However, it does not take into account changes to trade union membership numbers and therefore the unit rate is likely to change once pupil numbers and trade union membership numbers are known.
86. The table below illustrates the maintained school contribution should the items above be de-delegated, if the same unit rate was retained and all of those schools expected to become academies have converted by 1 April 2014.

Services	Distributed through formula factor	Total Value	Per-pupil
Facilities Time	Basic entitlement	£48,240	£3.31
School Specific Contingency	Basic entitlement	£82,000	£5.63

Question: How far do you agree or disagree with the proposal to de-delegate Facilities Time?

(Please answer Q21 on the consultation response form if applicable).

Question: How far do you agree or disagree with the proposal to de-delegate School Contingency?

(Please answer Q22 on the consultation response form if applicable).

Falling Rolls and Growth Fund

87. New for 2014/15 is that funding can be retained centrally before the formula is calculated for falling rolls where a populations bulge is expected in the future but where a good and necessary school or academy currently has surplus places and faces unmanageable funding shortfall in the short term.

88. Funding can also be retained for a growth fund, and additional classes needed as a consequence of infant class size regulations.
89. The requirements of the falling rolls fund and the growth fund are that:
- The falling rolls fund should be restricted to population increases expected in 2-3 years in necessary schools which are classed by OFSTED as good or outstanding. It must not be used to prop up unpopular or failing schools.
 - The growth fund can be used only for the purpose of supporting growth in pre-16 pupil numbers to meet basic need, to support additional classes needed to meet the infant class size regulation and to meet the costs of new schools.
 - Both funds must be used on the same basis for the benefit of both maintained schools and recoupment academies.
 - Any funds remaining at the end of the financial year must be added to the following year's DSG and reallocated to maintained and academy schools through the formula.
 - Councils are required to produce criteria on which any falling rolls or growth funding is to be allocated. These should provide a transparent and consistent basis (with differences permitted between phases) for the allocation of funding.
 - Councils need to propose the criteria for both funds to the Schools Forum and gain its agreement before funding is allocated. The Council also needs to consult School Forum on the total sum to be top-sliced from each phase. The EFA will check the criteria for compliance with the regulations.
90. The Growth fund should not be used to support schools which are undergoing reorganisations to change the age range and/or admitting additional year groups. The council is expected to apply to vary the pupil numbers in these cases, based on the estimated intake in September. However, councils may wish to add criteria for the use of the Growth fund where the estimated pupil numbers are significantly short of the actual September intake and where the additional pupils are admitted because of basic need requirements.
91. In 2013/14 Central Bedfordshire Council agreed with the School Forum the criteria for the Growth Fund and an amount of £800,000 to be retained centrally for this purpose, which also included a factor to assist lower and primary schools, to meet the infant class size regulations, where a breach is unavoidable. The EFA approved the criteria as being compliant with the regulations.
92. Central Bedfordshire is an area that will see significant growth in school aged children over the coming years, triggered by the increase in birth rate (which is impacting now and for at least the next five years), and by the rate of local housing development that is forecast over the next 25 years. The council's School Organisation Plan outlines the pattern of this growth across phases and its New School Places Programme establishes an investment strategy for major projects to ensure that the council continues to meet its statutory obligations to provide sufficient high quality school places. In addition the council will continue to utilise its programme of temporary accommodation where appropriate and will work with schools and academies in each of our planning areas to discuss school organisation and admissions issues and agree management options.

93. For 2014/15 it will be necessary to increase the Growth fund by £200,000, the criteria will be reviewed and agreed with School Forum and the EFA.
94. Central Bedfordshire Council and the Schools Forums have considered retaining centrally funding for schools with falling rolls. However, funding falling rolls is restricted to population increases in 2-3 years and affects maintained schools and academies. The general consensus was that the criteria would result in unfair treatment where schools predicted growth but were not considered good or outstanding. To introduce a new factor would result in the AWPU values being reduced to fund this. The impact on schools not recognised as good or outstanding would result in a reduction of funding through the basic per pupil entitlement but they would also not qualify for falling rolls funding.
95. Central Bedfordshire Council and the Schools Forums propose to increase the centrally held funding for the Growth fund by £200,000, to reflect the increased number of schools meeting the criteria for funding. However, it is proposed not to include a new fund for falling rolls and to leave the exiting funding within the AWPU values.

**Question: How far do you agree or disagree with the proposal to retain centrally £1,000,000 for the purpose of the Growth Fund?
(Please answer Q23 on the consultation response form if applicable).**

**Question: How far do you agree or disagree with the proposal not to retain centrally funding for the purpose of Falling Rolls?
(Please answer Q24 on the consultation response form if applicable).**

Requests to vary pupil numbers

96. The EFA expect requests to vary pupil numbers to be submitted by councils where maintained schools or academies are changing their age range or are part of a reorganisation. Applications approved so far use a weighted average of pupil numbers, taking account of the increase or reduction in pupil numbers from the start of the new academic year.
97. As in year changes to budgets are not permitted, any proposals which involve adjusting budgets where actual numbers differ from estimates could only be agreed on the basis that the adjustment would not take place until 2015/16, subject to any restrictions imposed by a National Funding Formula. It is important therefore that a realistic estimate is made for the adjustment in 2014/15.
98. Where an Academy is part of the pupil number variation, then the full effect of the change will be incorporated in their 2014/15 budget, as this is effective from September 2014.
99. The Growth fund should be used where schools are being asked to take on extra classes within their existing age range because of basic need and not where the age range is changing. It could be used though where basic need growth results in actual numbers being significantly greater than estimated in schools changing their age range.
100. Central Bedfordshire Council has made an in principle application to vary the application of The School and Early Years Finance Regulations 2013 for the

financial year 2014/15 and disapply the use of October census data for specific schools, with the intention to more accurately reflect pupil numbers in schools and academies affected by changes of age range in the Dunstable and Houghton Regis area. The application detailed how the calculation would be made and how adjustments would be made where the actual numbers differ from estimates.

101. The EFA have responded to the application and advised that the Secretary of State intends to approve the request in principle, once the regulations are laid, for a variation to pupil numbers relating to the schools impacted. However, it is not possible to adjust the pupil numbers in year once the October 14 census information is available. This can only happen in the 2015/16 formula and will be subject to what is allowed under a National Funding Formula.
102. To inform the 2014/15 budget setting process for maintained schools and for Academies the council needs to be able to provide estimates in late January 2014 for numbers expected in each school affected by the implementation of age range changes (directly or indirectly) in the following September 2014.
103. Secondary/Upper transfer applications for September 2014 will be known by the admissions application deadline at the end of October 2013, which will provide clarity on numbers of pupils seeking a Yr 7 and a Yr 9 place at an upper/secondary (excluding late applications, in year transfers and subsequent changes in preferences). This data will be verified with assistance from middle schools in affected areas and surveys of parents of children in current year 6.
104. 15th January 2014 is the admission transfer application deadline for middle schools and will provide clarity on numbers of pupils seeking transfer to Yr 5 in a middle school (excluding late applications, in year transfers and any changes of preference) for the following Sept 2014. This data will be verified with assistance from lower schools/academies in December 2013 with surveys of parents of children in current year 4 to declare their intended year 5 transfer or retention into Yr 5 in the lower school/academy.
105. For those schools who are already offering a year 5 or a year 7 in September 2013 (i.e the Lower Schools in Houghton Regis, All Saints Academy etc) the council will assume a roll on in those schools of these numbers into years 6 and 8 in September 2014.
106. In addition, the council intends to establish a budget correction mechanism to ensure that schools are not significantly over or under funded on the estimates established in January 2014 through the process as set out above, versus actual admissions in September 2014. Any estimate that is +/- 10% different to actual pupil numbers in the new year groups will be corrected through a corresponding increase or decrease in funding in the next financial year (15/16). This assumes that national regulations in place at that time will allow this correction to be made and also reflects advice already received from the EFA that corrections cannot be made in 2014/15.
107. For budget modelling purposes (which accompanies this School Funding Consultation), the council has based the calculations on the latest information with a clear grid showing each affected school and the assumptions (for modelling

purposes only) we have made of the number of pupils anticipated in the new year groups created from September 2014.

Early Years Block

108. There are no changes proposed for 2014/15.

High Needs Block

109. The only change proposed in the High Needs Block is that schools will be required to fund the first £6000 for High Needs Pupils. Central Bedfordshire agreed this figure when it was recommended for 2013/2014 following the consultation with schools.

Financial Model

110. Below is a summary of the proposed changes and the basis of the modelling attached:

Factor		2013/14	2014/15
A basic per pupil entitlement	Primary AWPU	£2,908	£2,905
	Key Stage 3 AWPU	£4,170	£4,167
	Key Stage 4 AWPU	£4,879	£4,876
Deprivation	IDACI Band 2 and 3	£554	£554
	IDACI Band 4	£1,108	£1,108
	IDACI Band 5	£1,662	£1,662
	IDACI Band 6	£2,216	£2,216
Looked After Children		£0	£468
Prior Attainment		£0	£0
EAL		£0	£0
Lump Sum		£120,000	£120,000
Split Site		£120,000	£120,000
Rates		Based on actual	Based on actual
PFI		£0	£0
Pupil Mobility		£0	£0
Post -16		n/a	n/a
Exceptional Premises factors	Joint Use	£98,330	£98,330
	Rent	n/a	£39,185
Sparsity		n/a	£0
Growth Fund		£800,000	£1,000,000
Falling Roles Fund		n/a	£0
School Admissions		£260,486	£260,486
School Forum		£3,000	£3,000
Copyright Licenses		£83,772	£83,772

111. The minimum funding guarantee has been calculated using the Department for Education's simplified calculation, the only exceptions being the lump sum, sixth form funding, rates and sparsity.

112. Winners have been capped to fund the required protection.
113. Lower Schools' Early Years, High Needs (SEN including Specialist Provisions) are as per 2013/14 funding.
114. Facilities Time and Contingencies has been assumed at the same unit rate as 2013/2014.
115. Statutory functions; coordinated admissions scheme and servicing of Schools' Forum assumed as at current levels.
116. The figures are illustrative and must not be taken as final allocations.

Please give any further comments you have about the proposals for school funding for 2014/2015 by answering Q25 of the consultation form.

The Consultation Process

117. The council is consulting schools in the council area to ensure that you have every opportunity to have your say on the final funding scheme.
118. The consultation is open between Wednesday, 4 September and Friday, 27 September 2013. You can respond to the consultation through our [online response form](#). Paper copies of the form are available on request by contacting Gezim Leka on gezim.leka@centralbedfordshire.gov.uk or 0300 300 6162.
119. The feedback from the consultation will be presented to the council's Executive in January 2014 where a final decision will be made.



A great place to live and work

Contact us...

by telephone: 0300 300 6162

by email: Gezim.Leka@centralbedfordshire.gov.uk

on the web: www.centralbedfordshire.gov.uk

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

Summary Financial Model - Subgr

School	Actual 2013/14 Schools Block Allocation (Before De-delegation)				Estimated 2014/15 Schools Block Allocation (Before De-delegation)				Analysis		
	October 2012 Pupil Nos	2013/14 Capping (-1.5%)	2013/14 Schools Block Allocation (5.7%)	2013/14 High Needs Unit	October 2012 Pupil Nos	2014/15 MFG (-1.5%)	2014/15 Schools Block Allocation (1.7%)	2014/15 Schools Capping (-1.5%)	Winners/Loser (rs)	Year on Year %	2014/15 Impact of Age Range Change
LOWERS											
All Saints	148	0	(19,476)	533,125	148	0	(12,247)	0	540,398	7,273	1.4
Anley Hill Acad	251	0	(34,730)	870,646	251	0	(20,737)	0	863,887	13,240	1.5
Ashton St Peters (va)	150	0	(23,821)	577,900	150	0	(15,305)	0	565,596	8,005	1.4
Aspley Guide	136	0	(13,128)	510,452	136	0	(5,942)	0	517,230	6,778	1.3
Beadesert	254	0	0	919,008	254	0	0	0	918,246	(762)	(0.1)
Beecroft	241	17,954	0	947,668	241	5,084	0	0	935,451	(12,217)	(1.3)
Caldecote	86	0	0	375,483	86	0	0	0	375,225	(258)	(0.1)
Campion	136	0	(2,352)	518,311	136	0	(12,978)	0	520,255	1,944	0.4
Church End	279	0	(16,254)	297,859	279	0	(4,000)	0	300,949	3,090	1.0
Clipstone Brook	197	0	(18,874)	941,643	197	0	(19,339)	0	1,025,680	84,036	8.9
Crainfield	268	0	(21,376)	881,913	268	0	(7,136)	0	895,349	13,436	1.5
Derwent	116	0	(462,201)	530,175	116	0	(19,880)	0	462,329	128	0.0
Doverly Down	144	0	(27,398)	530,175	144	0	(19,880)	0	537,261	7,086	1.3
Downsidge Acad (SI)Augu	90	68,888	0	529,556	90	63,035	0	0	523,432	(6,123)	(1.2)
Durton	54	0	0	279,455	54	0	0	0	279,933	(478)	(0.1)
Edon Bray Acad	127	0	(13,231)	480,924	127	0	(7,476)	0	487,256	6,332	1.3
Eversholt	74	0	(27,653)	308,836	74	0	(29,978)	0	312,155	3,319	1.1
Everton	47	0	0	261,519	47	0	0	0	261,378	(141)	(0.1)
Fairfield Park	219	0	0	785,706	219	0	0	0	786,227	521	0.1
Filwick	265	0	(23,515)	896,548	265	0	(9,388)	0	909,899	13,352	1.5
Gothic Mede	269	37,131	0	943,985	269	25,631	0	0	931,677	(12,308)	(1.3)
Gravenhurst	36	0	(1,114)	226,859	36	0	0	0	227,865	1,006	0.4
Greenfield	132	0	(21,082)	484,841	132	0	(14,255)	0	491,272	6,431	1.3
Greenleas	307	0	(21,826)	1,095,581	307	0	(5,430)	0	1,161,066	65,475	6.0
Hadrill Acad	296	0	(48,375)	1,002,899	296	0	(31,917)	0	1,018,069	15,570	1.6
Hawthorn Park	128	0	(6,831)	494,876	128	0	0	0	501,323	6,447	1.3
Haynes	96	0	(9,031)	407,452	96	0	(3,854)	0	412,341	4,889	1.2
Heathwood	150	1,050	(8,262)	888,081	150	6	0	0	577,488	(10,593)	(1.8)
Hockliffe	64	0	0	311,361	64	0	0	0	310,119	(1,242)	(0.4)
Houghton Conquest	74	0	0	342,813	74	0	0	0	342,591	(222)	(0.1)
Houghton Regis	186	0	0	716,769	186	0	0	0	716,211	(558)	(0.1)
Husborne Crawley	50	14,723	0	285,350	50	5,746	0	0	282,523	(2,427)	(0.9)
Dunstable Ickfield	273	0	(68,042)	917,548	273	0	(43,349)	0	931,422	13,874	1.5
John Donne	79	0	0	352,463	79	0	0	0	352,226	(237)	(0.1)
Kensworth	56	17,715	0	307,011	56	15,141	0	0	304,269	(2,742)	(0.9)
Kingsmeor	156	19,537	0	638,429	156	12,400	0	0	630,824	(7,605)	(1.2)
Lalabum	121	17,963	0	504,317	121	12,754	0	0	498,745	(5,572)	(1.1)
Lancot	298	6,546	0	1,084,405	298	6	0	0	1,059,010	(25,396)	(2.3)
Langford	164	0	(10,445)	589,833	164	0	(1,676)	0	588,109	(8,726)	(1.4)
Lark Rise Acad	219	0	(35,522)	731,018	219	0	(24,103)	0	741,780	10,761	1.5
Lawnside	269	163,148	0	1,077,835	269	147,919	0	0	1,063,638	(14,198)	(1.3)
Leedon	292	0	0	1,010,078	292	0	0	0	1,009,202	(876)	(0.1)
Linslade Lower	214	0	(4,791)	765,497	214	0	0	0	759,646	4,149	0.5
Maple Tree	174	0	(10,853)	650,481	174	0	(1,459)	0	659,353	8,872	1.4
Mary Bassett	224	11,089	0	829,030	224	1,916	0	0	818,585	(10,445)	(1.3)
Maudlin	141	0	(9,720)	531,505	141	0	(2,211)	0	538,591	7,085	1.3
Meppershall	91	0	(14,213)	371,713	91	0	(9,507)	0	376,146	4,432	1.2
Meggerhangar	52	0	0	272,429	52	0	0	0	272,273	(156)	(0.1)
Northill	59	0	(8,049)	286,260	59	0	(4,988)	0	288,164	2,904	1.0
Potton	252	0	(32,881)	839,478	252	0	(19,717)	0	851,886	12,408	1.5
Pulford	146	0	(43,163)	514,565	146	0	(35,778)	0	521,512	6,947	1.4
Pullokhill	59	0	0	293,405	59	0	0	0	293,228	(177)	(0.1)
Ramsay Manor	269	0	(26,457)	894,433	263	0	(11,929)	0	890,634	(3,799)	(0.4)
Raysford	149	15,650	0	541,232	149	0	(16,227)	0	548,443	7,211	1.3
Ridgmont	30	0	0	228,461	30	2,479	0	0	226,889	(1,571)	(0.7)
Robert Peel	258	0	0	934,434	258	0	0	0	934,112	(322)	(0.0)
Reocroft	241	0	(9,493)	846,685	241	0	0	0	854,455	8,770	1.0
Russell	233	0	(16,581)	794,974	233	0	(5,745)	0	806,723	11,749	1.5
Shefford	366	0	(37,197)	1,174,941	366	0	(17,909)	0	1,193,131	18,190	1.5
Shelton	60	0	0	298,530	60	0	0	0	298,350	(180)	(0.1)
Shillington	109	0	0	446,789	109	0	(6,614)	0	446,334	(455)	(0.1)
Sliso	130	0	(13,282)	497,124	130	6	0	0	486,447	(10,677)	(2.1)
Slip End	100	0	(429,284)	954,399	100	0	(30,132)	0	968,882	14,483	1.5
Southcott	294	0	(45,037)	964,389	294	0	(750)	0	969,661	2,882	1.0
Southill	56	0	0	286,779	56	0	0	0	289,861	2,882	1.0
Southlands	280	0	(9,536)	938,529	280	0	0	0	947,705	9,176	1.0
St Andrews	385	0	(11,084)	1,267,301	385	6	0	0	1,259,791	(7,510)	(0.6)
St Christophers Acad	215	0	(65,000)	720,691	215	0	(43,762)	0	731,284	10,593	1.5
St Georges	78	86,391	0	463,983	78	81,573	0	0	458,931	(5,052)	(1.1)
St Leonards	105	0	(11,597)	420,085	105	0	(6,515)	0	425,334	5,248	1.2
St Marys (Clephill)	118	0	(27,736)	439,517	118	0	(21,760)	0	445,139	5,622	1.3
St Marys (Stotford)	219	0	(40,817)	721,016	219	0	(26,610)	0	731,566	10,550	1.5
St Marys (Cardington)	137	0	0	595,570	137	0	0	0	595,199	(371)	(0.1)
St Swithuns	130	52,386	0	822,386	130	8	0	0	822,386	0	0.0
St Vincents	196	13,586	0	782,971	196	4,282	0	0	773,079	(9,892)	(1.3)
Stanbridge	95	1,910	0	405,047	95	0	0	0	402,852	(2,195)	(0.5)
Standon	107	0	0	435,044	107	0	(1,540)	0	440,851	5,507	1.3
Stuhann	50	0	0	270,773	50	0	0	0	270,623	(150)	(0.1)
Sundon	60	0	(3,253)	310,360	60	0	0	0	313,433	3,073	1.0
Suton	68	0	0	318,532	68	0	0	0	318,328	(204)	(0.1)
Swallowfield	288	0	(41,105)	966,079	288	0	(25,778)	0	970,541	14,463	1.5
Templefield	287	0	(38,440)	942,089	287	0	(23,280)	0	966,378	14,288	1.5
The Friars	289	0	(26,438)	937,333	289	0	(11,628)	0	951,741	14,407	1.5
Thomas Johnson	89	0	(2,057)	387,495	89	0	0	0	385,265	(2,230)	(0.6)
Thomas Whitehead	192	0	(2,200)	780,486	192	0	0	0	782,573	2,087	0.3

Summary Financial Model - Subgr

school funding consultation Appendix C Financial Model

School	Actual 2013/14 Schools Block Allocation (Before De-delegation)				Estimated 2014/15 Schools Block Allocation (Before De-delegation)				Analysis				
	October 2012 Pupil Nos	2013/14 MFG (-1.5%)	2013/14 Schools Block Allocation (5.7%)	2013/14 delegation	October 2012 Pupil Nos	2013/14 High Needs Unit Places	Oct 12 Adjusted Pupil Nos	2014/15 MFG (-1.5%)	2014/15 Capping (1.7%)	2014/15 Schools Block Allocation	Winners/Loser (rs)	Year on year %	2014/15 Impact of Age Range Change
Thornhill	137	0	608,129	0	137	0	137	0	0	608,215	86	0.0	Roll on of Yr5 to Yr6
The Farm	164	24,574	747,663	0	164	0	164	15,846	0	738,443	(9,220)	(1.2)	Roll on of Yr5 to Yr6
Toddington St George	310	0	994,778	(42,525)	310	8	302	0	(25,497)	997,316	(7,462)	(0.8)	
Totterbeche	61	4,391	313,638	0	61	0	61	1,781	0	310,846	(2,793)	(0.9)	
Walling	176	0	675,733	(8,628)	176	0	176	0	0	663,833	8,100	1.2	
Westoning	131	0	484,070	(19,699)	131	0	131	0	(12,902)	490,474	6,404	1.3	
Woburn	51	24,471	297,566	0	51	0	51	17,893	0	294,925	(2,642)	(0.9)	
Wrestlingworth	53	0	276,127	0	53	0	53	0	0	275,969	(159)	(0.1)	
Sub Total	15,514	547,616	(1,101,349)	0	15,514	46	15,468	413,671	(636,923)	56,824,374	320,953	0.5	
Middles													
Alameda	574	0	2,161,091	0	574	0	574	0	0	2,159,389	(1,722)	(0.1)	Potential reduction in Yr5 transfers in and potential of Yr7 transfers out
Arnold	521	0	1,966,993	0	521	6	515	0	0	1,947,466	(21,527)	(1.1)	
Ashton (va)	526	0	2,116,940	0	526	0	526	0	0	2,117,057	117	0.0	
Brewers Hill	194	198,685	0	1,090,583	194	0	194	183,818	0	1,076,367	(14,215)	(1.3)	Potential reduction in Yr5 transfers in and potential of Yr7 transfers out
Brooklands	268	121,167	0	1,206,786	268	0	268	105,745	0	1,190,560	(16,226)	(1.3)	
Burgoyne	222	0	954,456	0	222	0	222	0	0	955,094	638	0.1	
Edward Peake	326	150,772	0	1,432,192	326	0	326	131,290	0	1,412,617	(19,576)	(1.4)	Age range change being supported through growth
Eltonbury	402	43,630	0	1,899,332	402	0	402	21,731	0	1,567,393	(21,939)	(1.4)	fund
Caddington Village	489	0	1,843,184	0	489	0	489	0	0	1,842,185	(999)	(0.1)	
Fulbrook	388	0	1,489,892	0	388	0	388	0	0	1,489,235	(657)	(0.0)	
Gilbert Ingfield	444	62,564	0	1,834,564	444	0	444	37,832	0	1,809,026	(25,558)	(1.4)	
Hentlow	532	0	2,022,721	0	532	0	532	0	0	2,023,018	297	0.0	
Holmehead	509	39,013	0	1,959,089	509	8	501	13,339	0	1,903,324	(55,765)	(2.8)	
Holywell	475	0	1,824,985	0	475	0	475	0	0	1,824,490	(495)	(0.0)	no admission to a new year group, existing numbers in year groups
Kings Houghton Acad	434	21,960	0	1,901,944	434	0	434	0	0	1,879,601	(22,343)	(1.2)	moving up
Leighton	467	0	1,835,123	0	467	0	467	0	0	1,834,191	(932)	(0.1)	
Linslade Middle	621	0	2,340,766	0	621	0	621	0	0	2,338,903	(1,863)	(0.1)	
Mill Vale Acad (Barrfield)	382	0	1,558,375	0	382	0	382	0	0	1,558,132	(243)	(0.0)	From September 2013 the school will already have children in every year group Year R - Year 8
Parkfields	469	0	1,814,505	0	469	8	461	0	0	1,782,519	(31,986)	(1.8)	
Priority Middle Acad	463	0	1,796,028	0	463	0	463	0	0	1,795,098	(930)	(0.1)	New Yr 9
Robert Bloomfield	857	0	3,152,535	0	857	0	857	0	0	3,151,428	(1,109)	(0.0)	
Sandeye Place	493	0	1,907,306	0	493	0	493	0	0	1,905,827	(1,479)	(0.1)	
Streetfield	367	53,654	0	1,690,765	367	6	361	31,396	0	1,643,344	(47,421)	(2.8)	Potential reduction in Yr5 transfers in and potential of Yr7 transfers out
Woodland	559	0	2,168,540	(2,601)	559	0	559	0	0	2,169,464	924	0.0	
Sub Total	10,952	692,236	(2,601)	43,860,716	10,952	23	10,954	525,152	0	43,375,709	(285,008)	(0.7)	
Upsons													
The Cedars	836	0	4,153,093	0	836	0	836	0	0	4,151,504	(1,590)	(0.0)	
Harlington	1,033	0	4,866,709	0	1,033	4	1,029	0	0	4,965,811	(20,899)	(0.4)	
Manshead	796	90,778	0	4,125,213	796	6	790	29,097	0	4,035,709	(89,504)	(2.2)	New Yr 7
All Saint Academy	443	157,330	0	2,512,339	443	0	443	121,407	0	2,476,604	(35,735)	(1.4)	Roll on of existing Yr 7 into New Yr 7
Queensbury	626	0	3,148,146	0	626	0	626	0	0	3,160,761	12,615	0.4	
Redborne	1,039	0	4,993,184	0	1,039	0	1,039	0	0	4,990,541	(2,643)	(0.1)	
Sam Whitbread	1,202	0	5,741,929	0	1,202	6	1,196	0	0	5,713,158	(28,771)	(0.5)	
Sandy	891	59,280	0	3,164,707	829	0	829	0	0	3,154,082	(625)	(0.0)	
Straton	891	0	4,341,094	0	891	0	891	0	0	4,281,450	(59,644)	(1.4)	
Vandyke	722	21,729	0	3,579,604	722	0	722	0	0	3,557,662	(21,942)	(0.6)	
Sub Total	8,217	329,117	(12,971)	40,746,019	8,217	16	8,201	150,605	0	40,487,381	(248,738)	(0.6)	

Assumptions:
 Rent total £39,183 as agreed by EFA as an exceptional factor for 6 out of 9 schools, a deduction of £1 on AWPU
 Split site - £120k increase for 14/15 (650k for Greenleaf and £70k for Church End), a deduction of £3 on AWPU
 LAC - £468 per pupil who have been looked after for 1 day, a deduction of £1 on AWPU
 No changes to allowable deduction before DSG (Admissions, Schools Forum, CLA)
 An increase of £200k to top slice for Growth Fund, a deduction of £6 on AWPU
 October 12 Pupil numbers
 Adjusted pupil numbers for High Need places in Special Provisions
 No changes to Deprivation, Rates
 MFG at minus 1.5%
 Capping at 1.77%
 High Needs & Early Years to be assumed as 2013/14

School Funding 2014/15 Consultation Results

64 responses

Phase of School

	Frequency	Percent
Nursery school	2	3.3
Primary	47	77.0
Secondary Schools	9	14.8
Special	1	1.6
UTC & Free School	2	3.3
Total	61	100.0

Q4 Is your school:

		Nursery school	Primary	Secondary	Special	UTC and Free School	Total
An Academy	Count	0	4	3	1	2	10
	% within phase	.0%	6.6%	4.9%	1.6%	3.3%	16.4%
Maintained by the Local Authority	Count	2	43	6	0	0	51
	% within phase	3.3%	70.5%	9.8%	.0%	.0%	83.6%
Total	Count	2	47	9	1	2	61
	% within phase	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Q5 What is your role at the school?

		Nursery school	Primary	Secondary	Special	UTC and Free School	Total
Head teacher	Count	1	31	5	1	1	39
	% within phase	1.6%	50.8%	8.2%	1.6%	1.6%	63.9%
Business/ Office role	Count	1	11	3	0	1	16
	% within phase	1.6%	18.0%	4.9%	.0%	1.6%	26.2%
School Governor/ Governing body	Count	0	4	0	0	0	4
	% within phase	.0%	6.6%	.0%	.0%	.0%	6.6%
Other	Count	0	0	1	0	0	1
	% within phase	.0%	.0%	1.6%	.0%	.0%	1.6%
No answer	Count	0	1	0	0	0	1
	% within phase	.0%	1.6%	.0%	.0%	.0%	1.6%
Total	Count	2	47	9	1	2	61
	% within phase	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Q6 How far do you agree or disagree that the base level for the 2014/15 AWPU rates should be set at the 2013/14 levels?

		Nursery school	Primary	Secondary	Special	UTC and Free School	Total	Total Combined %
Strongly agree	Count	0	2	0	0	0	2	59%
	% within phase	.0%	3.3%	.0%	.0%	.0%	3.3%	
Agree	Count	1	27	4	1	1	34	55.7%
	% within phase	1.6%	44.3%	6.6%	1.6%	1.6%	55.7%	
Neither agree nor disagree	Count	0	12	2	0	1	15	25%
	% within phase	.0%	19.7%	3.3%	.0%	1.6%	24.6%	
Disagree	Count	0	4	1	0	0	5	15%
	% within phase	.0%	6.6%	1.6%	.0%	.0%	8.2%	
Strongly disagree	Count	1	1	2	0	0	4	6.6%
	% within phase	1.6%	1.6%	3.3%	.0%	.0%	6.6%	
No answer	Count	0	1	0	0	0	1	1.6%
	% within phase	.0%	1.6%	.0%	.0%	.0%	1.6%	
Total	Count	2	47	9	1	2	61	100.0%
	% within phase	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Mean score:		4.50	3.37	2.78	4.00	3.00	3.25	

Q6.a If you disagree with this proposal please explain why.

Although the figures quoted are a minimum figure, as opposed to the figures quoted later in the document) this potentially means a large reduction in funding for all schools and is not representative of current rates of inflation.
I think budget for 14/15 should reflect annual conditions
Last year's AWPU figures, coming at the same time as the withdrawal of disadvantage subsidies (£60,000), severely impacted upon the budget to the detriment of pupil-teacher ratios and support for pupils.
Overall costs have risen, therefore AWPU should reflect this.
They should increased at least 1% to off set against increase in salaries
This would not represent an increase in line with inflation since the cost of resourcing and staffing will rise over the coming year.
We cannot understand why this is not index linked. We point out that teacher salaries have increased by 1%.

Q7 How has your school's deprivation funding been applied in 2013/14?

		Nursery school	Primary	Secondary	Special	UTC and Free School	Total
It has been absorbed within the overall budget	Count	1	32	6	1	1	41
	% within phase	1.6%	52.5%	9.8%	1.6%	1.6%	67.2%
It has supported deprived pupils in addition to the Pupil Premium	Count	0	12	3	0	1	16
	% within phase	.0%	19.7%	4.9%	.0%	1.6%	26.2%
No answer	Count	1	3	0	0	0	4
	% within phase	1.6%	4.9%	.0%	.0%	.0%	6.6%
Total	Count	2	47	9	1	2	61
	% within phase	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Q8 If you said 'It has supported deprived pupils in addition to the Pupil Premium', is the impact of this spend evaluated by the Governing Body?

		Nursery school	Primary	Secondary	Special	UTC and Free School	Total
Yes	Count	0	12	3	0	1	16
	% within phase	.0%	75.0%	18.8%	.0%	6.3%	100.0%
No answer	Count	0	0	0	0	0	0
	% within phase	.0%	.0%	.0%	.0%	.0%	.0%
Total	Count	0	12	3	0	1	16
	% within phase	.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Q9 How far do you agree or disagree with the proposal to include Looked After Children as a factor in the funding formula?

		Nursery school	Primary	Secondary	Special	UTC and Free School	Total	Total Combined %
Strongly agree	Count	1	5	1	0	0	7	66%
	% within phase	1.6%	8.2%	1.6%	.0%	.0%	11.5%	
Agree	Count	1	24	6	1	1	33	25%
	% within phase	1.6%	39.3%	9.8%	1.6%	1.6%	54.1%	
Neither agree nor disagree	Count	0	13	1	0	1	15	10%
	% within phase	.0%	21.3%	1.6%	.0%	1.6%	24.6%	
Disagree	Count	0	5	1	0	0	6	
	% within phase	.0%	8.2%	1.6%	.0%	.0%	9.8%	
Strongly disagree	Count	0	0	0	0	0	0	
	% within phase	.0%	.0%	.0%	.0%	.0%	.0%	
Total	Count	2	47	9	1	2	61	
	% within phase	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Mean score:		4.50	3.62	3.78	4.00	3.50	3.67	

Q9.a If you disagree with this proposal please explain why.

LAC children are well supported through other outside agencies as well as receiving Pupil Premium funding.
LAC pupils receive additional funding from external agencies. The funding would be better spent on increasing the basic entitlement to benefit a wider range of pupils.
Many schools do not have looked after children within their settings. These would also be likely to have been the schools who have seen reduction in budget due to changes to the overall budget factor and more money going to deprived areas.
They should be funded independently when the need arises
This should be kept a separate item to ensure that funding is targeted at those pupils

Q10 How far do you agree or disagree with the proposal not to distribute funding based on prior attainment?

		Nursery school	Primary	Secondary	Special	UTC and Free School	Total	Total Combined %
Strongly agree	Count	1	4	2	0	0	7	69%
	% within phase	1.6%	6.6%	3.3%	.0%	.0%	11.5%	
Agree	Count	1	28	5	1	0	35	57.4%
	% within phase	1.6%	45.9%	8.2%	1.6%	.0%	57.4%	
Neither agree nor disagree	Count	0	7	0	0	2	9	15%
	% within phase	.0%	11.5%	.0%	.0%	3.3%	14.8%	
Disagree	Count	0	5	0	0	0	5	15%
	% within phase	.0%	8.2%	.0%	.0%	.0%	8.2%	
Strongly disagree	Count	0	3	1	0	0	4	6.6%
	% within phase	.0%	4.9%	1.6%	.0%	.0%	6.6%	
No answer	Count	0	0	1	0	0	1	1.6%
	% within phase	.0%	.0%	1.6%	.0%	.0%	1.6%	
Total	Count	2	47	9	1	2	61	100.0%
	% within phase	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Mean score:		4.50	3.53	3.88	4.00	3.00	3.60	

Q10.a If you disagree with this proposal please explain why.

Additional funding could be used to support those pupils are below their peer group
Baseline assessment on entry clearly shows that pupils are not performing at the level expected, therefore it is only right that pupils should benefit from extra funding to enable their receiving schools to provide the much needed support necessary to bring them up to and in line with national expectations.
For pupils who do not attain a GLD there are so many factors involved that additional funding to mitigate these factors and action preventative/intervention approaches for these children involves money and resources to improve their chances for KS1.
Funding should be independent of cohort achievement
Funding should reflect the needs of the children, if children are not making progress in line with their peers funding should be directed to enable schools to provide additional support for these children
I believe funding should follow the child to support the current school.
Some funding may be need to support pupils whose previous attainment was below that of their peer group. This cohort may need additional resources which may be hard to fund from the school budget.

Q11 How far do you agree or disagree with the proposal to exclude English as an Additional Language (EAL) as a factor in the funding formula?

		Nursery school	Primary	Secondary	Special	UTC and Free School	Total	Total Combined %
Strongly agree	Count	1	3	3	0	0	7	48%
	% within phase	1.6%	4.9%	4.9%	.0%	.0%	11.5%	
Agree	Count	1	18	3	0	0	22	36.1%
	% within phase	1.6%	29.5%	4.9%	.0%	.0%	36.1%	
Neither agree nor disagree	Count	0	14	2	1	1	18	29.5%
	% within phase	.0%	23.0%	3.3%	1.6%	1.6%	29.5%	
Disagree	Count	0	11	0	0	1	12	19.7%
	% within phase	.0%	18.0%	.0%	.0%	1.6%	19.7%	
Strongly disagree	Count	0	1	1	0	0	2	3.3%
	% within phase	.0%	1.6%	1.6%	.0%	.0%	3.3%	
Total	Count	2	47	9	1	2	61	100.0%
	% within phase	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Mean score:		4.50	3.23	3.78	3.00	2.50	3.33	

Q11.a If you disagree with this proposal please explain why.

As more people migrate to the UK, English is not always a first language therefore more resources are required to assist pupils and therefore should be part of the funding formula but as a extra part.
Further support often required
Many children with EAL need extra help with literacy. They may live in an area where there is no deprivation and therefore the school receives no funding to support them.
Our school has a significant number of EFL/EAL children and budget is diverted to support these pupils. Additional funding would greatly support all pupils within our school.
Specialist support is beneficial to support children in settling and to support their learning - this often has to be bought in.
and/or arrive in larger numbers

Q12 How far do you agree or disagree with the continuation of one lump sum of £120,000?

		Nursery school	Primary	Secondary	Special	UTC and Free School	Total	Total Combined %
Strongly agree	Count	0	13	2	0	1	16	77%
	% within phase	.0%	21.3%	3.3%	.0%	1.6%	26.2%	
Agree	Count	2	23	5	1	0	31	8%
	% within phase	3.3%	37.7%	8.2%	1.6%	.0%	50.8%	
Neither agree nor disagree	Count	0	4	0	0	1	5	15%
	% within phase	.0%	6.6%	.0%	.0%	1.6%	8.2%	
Disagree	Count	0	6	2	0	0	8	15%
	% within phase	.0%	9.8%	3.3%	.0%	.0%	13.1%	
Strongly disagree	Count	0	1	0	0	0	1	100.0%
	% within phase	.0%	1.6%	.0%	.0%	.0%	1.6%	
Total	Count	2	47	9	1	2	61	
	% within phase	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Mean score:		4.00	3.87	3.78	4.00	4.00	3.87	

Q12.a If you disagree with this proposal please explain why.

Because factors in each school are so different and may not apply to each situation
Continually rising costs necessitate a review of this lump sum commensurate with inflation.
I agree with the continuation of one lump sum, but it should be weighted according to the size of the school.
I believe that it is unfair for the same lump sum to be applied regardless of the size of school. I think that there should be a mechanism for applying a smaller lump sum to tiny schools with few pupils and a greater sum to very large schools.
I believe the lump sum should be increased.
Inflation and rising costs have not been taken into account
Needs to be higher, current funding does not allow for school maintenance let alone improvements.
Should move towards £150,000
The lump sum as it is currently puts a considerable burden on small schools because it fails to make any compensation for smaller pupil numbers. A lump sum of £150,000 would go some way to redressing the balance.

Q13 How far do you agree or disagree with the continuation of funding schools through a split site factor?

		Nursery school	Primary	Secondary	Special	UTC and Free School	Total	Total Combined %
Strongly agree	Count	0	3	0	0	0	3	33%
	% within phase	.0%	4.9%	.0%	.0%	.0%	4.9%	
Agree	Count	1	9	5	0	2	17	57%
	% within phase	1.6%	14.8%	8.2%	.0%	3.3%	27.9%	
Neither agree nor disagree	Count	1	30	3	1	0	35	10%
	% within phase	1.6%	49.2%	4.9%	1.6%	.0%	57.4%	
Disagree	Count	0	4	1	0	0	5	100.0%
	% within phase	.0%	6.6%	1.6%	.0%	.0%	8.2%	
Strongly disagree	Count	0	1	0	0	0	1	100.0%
	% within phase	.0%	1.6%	.0%	.0%	.0%	1.6%	
Total	Count	2	47	9	1	2	61	
	% within phase	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Mean score:		3.50	3.19	3.44	3.00	4.00	3.26	

Q13.a If you disagree with this proposal please explain why.

Additional costs would not be doubled
Additional lump sum too much.
Not required. Council should not allocate money to this because the school staffing structure will be reflected by the size of schools. £120k seems excessive. If there needs to be on this should be on a per pupil basis at both schools. Often it is only the Head who would go between both sites and this cost is small.
The schools know and need to budget for this as they have other costs shared.
This needs further discussion

Q14 How far do you agree or disagree with the continuation of funding rates on an actual basis?

		Nursery school	Primary	Secondary	Special	UTC and Free School	Total	Total Combined %
Strongly agree	Count	1	17	6	0	1	25	84%
	% within phase	1.6%	27.9%	9.8%	.0%	1.6%	41.0%	
Agree	Count	1	21	3	1	0	26	13%
	% within phase	1.6%	34.4%	4.9%	1.6%	.0%	42.6%	
Neither agree or disagree	Count	0	7	0	0	1	8	3%
	% within phase	.0%	11.5%	.0%	.0%	1.6%	13.1%	
Disagree	Count	0	1	0	0	0	1	3%
	% within phase	.0%	1.6%	.0%	.0%	.0%	1.6%	
Strongly disagree	Count	0	1	0	0	0	1	3%
	% within phase	.0%	1.6%	.0%	.0%	.0%	1.6%	
Total	Count	2	47	9	1	2	61	
	% within phase	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Mean score:		4.50	4.11	4.67	4.00	4.00	4.20	

Q14.a If you disagree with this proposal please explain why.

Disagree only as actual amounts cannot be altered until end of financial year, leaving schools out of pocket.

Q15 How far do you agree or disagree with the proposal to continue with excluding a Private Finance Initiative (PFI) factor from the funding formula for 2014/15?

		Nursery school	Primary	Secondary	Special	UTC and Free School	Total	Total Combined %
Strongly agree	Count	1	4	2	0	0	7	51%
	% within phase	1.6%	6.6%	3.3%	.0%	.0%	11.5%	
Agree	Count	1	21	2	0	0	24	46%
	% within phase	1.6%	34.4%	3.3%	.0%	.0%	39.3%	
Neither agree nor disagree	Count	0	21	5	0	2	28	3%
	% within phase	.0%	34.4%	8.2%	.0%	3.3%	45.9%	
Disagree	Count	0	1	0	1	0	2	3%
	% within phase	.0%	1.6%	.0%	1.6%	.0%	3.3%	
Strongly disagree	Count	0	0	0	0	0	0	3%
	% within phase	.0%	.0%	.0%	.0%	.0%	.0%	
Total	Count	2	47	9	1	2	61	
	% within phase	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Mean score:		4.50	3.60	3.67	2.00	3.00	3.59	

Q15.a If you disagree with this proposal please explain why.

No comments

Q16 How far do you agree or disagree with the proposal to continue excluding pupil mobility as a factor from the funding formula for 2014/15?

		Nursery school	Primary	Secondary	Special	UTC and Free School	Total	Total Combined %
Strongly agree	Count	1	2	1	0	0	4	43%
	% within phase	1.6%	3.3%	1.6%	.0%	.0%	6.6%	
Agree	Count	1	17	4	0	0	22	38%
	% within phase	1.6%	27.9%	6.6%	.0%	.0%	36.1%	
Neither agree nor disagree	Count	0	17	3	1	2	23	20%
	% within phase	.0%	27.9%	4.9%	1.6%	3.3%	37.7%	
Disagree	Count	0	8	0	0	0	8	20%
	% within phase	.0%	13.1%	.0%	.0%	.0%	13.1%	
Strongly disagree	Count	0	3	1	0	0	4	6.6%
	% within phase	.0%	4.9%	1.6%	.0%	.0%	6.6%	
Total	Count	2	47	9	1	2	61	100.0%
	% within phase	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Mean score:		4.50	3.15	3.44	3.00	3.00	3.23	

Q16.a If you disagree with this proposal please explain why.

As our town experiences a lot of mobility, I think each school should be assessed and if it is shown to have a high rate of mobility, this should be reflected accordingly.
High Mobility
If pupils have accessibility problems schools will need as much money as possible to help them, and ensure continued funding for school changes. Especially in light of reduced capital funding
in a growth area more children arrive outside the funding window, than leave, so the school is out of pocket for the rest of the year. In several cases highly mobile children arrive and leave outside the census and so the school support them, without any funding at all.
Our school had 34 new starters with us over one year, all of whom started after the beginning of September. This needs to be taken into consideration with regards to our funding.
Pupil mobility can have a big effect on needs especially when the children arriving at a school have significant educational difficulties or behaviour.
Pupil mobility continues to increase in the Dunstable area, with the result that parents move their children seemingly at will. A protocol has been devised at Streetfield to help pupils through the induction period, integrate them fully and monitor their progress. Last year, for example, some 24 pupils left Year 8 who did not start in Year 5. All this movement makes it difficult to set meaningful targets and reach them as the pupil cohort can vary significantly throughout the year. It is disappointing to note that pupil mobility is not considered an issue when it is clearly a factor in securing pupil progress and achievement.
Schools losing out on funding when traveller children switch schools mid year.

Q17 How far do you agree or disagree with the proposal to continue funding the joint use arrangement?

		Nursery school	Primary	Secondary	Special	UTC and Free School	Total	Total Combined %
Strongly agree	Count	0	0	1	0	0	1	28%
	% within phase	.0%	.0%	1.6%	.0%	.0%	1.6%	
Agree	Count	1	11	3	0	1	16	69%
	% within phase	1.6%	18.0%	4.9%	.0%	1.6%	26.2%	
Neither agree nor disagree	Count	1	35	4	1	1	42	%
	% within phase	1.6%	57.4%	6.6%	1.6%	1.6%	68.9%	
Disagree	Count	0	0	0	0	0	0	%
	% within phase	.0%	.0%	.0%	.0%	.0%	.0%	
Strongly disagree	Count	0	0	0	0	0	0	%
	% within phase	.0%	.0%	.0%	.0%	.0%	.0%	
No answer	Count	0	1	1	0	0	2	3.3%
	% within phase	.0%	1.6%	1.6%	.0%	.0%	3.3%	
Total	Count	2	47	9	1	2	61	100.0%
	% within phase	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Mean score:		3.50	3.24	3.63	3.00	3.50	3.31	

Q17.a If you disagree with this proposal please explain why.

No comments

Q18 How far do you agree or disagree with a new rent factor for six CBC schools?

		Nursery school	Primary	Secondary	Special	UTC and Free School	Total	Total Combined %
Strongly agree	Count	0	2	0	0	0	2	34%
	% within phase	.0%	3.3%	.0%	.0%	.0%	3.3%	
Agree	Count	1	16	2	0	0	19	59%
	% within phase	1.6%	26.2%	3.3%	.0%	.0%	31.1%	
Neither agree nor disagree	Count	1	27	6	1	1	36	2%
	% within phase	1.6%	44.3%	9.8%	1.6%	1.6%	59.0%	
Disagree	Count	0	0	0	0	0	0	2%
	% within phase	.0%	.0%	.0%	.0%	.0%	.0%	
Strongly disagree	Count	0	1	0	0	0	1	3%
	% within phase	.0%	1.6%	.0%	.0%	.0%	1.6%	
No answer	Count	0	1	1	0	1	3	4.9%
	% within phase	.0%	1.6%	1.6%	.0%	1.6%	4.9%	
Total	Count	2	47	9	1	2	61	100.0%
	% within phase	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Mean score:		3.50	3.39	3.25	3.00	3.00	3.36	

Q18.a If you disagree with this proposal please explain why.

No comments

Q19 How far do you agree or disagree with the proposal not to include a new sparsity factor for 2014/15?

		Nursery school	Primary	Secondary	Special	UTC and Free School	Total	Total Combined %
Strongly agree	Count	0	1	0	0	0	1	54%
	% within phase	.0%	1.6%	.0%	.0%	.0%	1.6%	
Agree	Count	2	24	4	1	1	32	34%
	% within phase	3.3%	39.3%	6.6%	1.6%	1.6%	52.5%	
Neither agree nor disagree	Count	0	17	3	0	1	21	10%
	% within phase	.0%	27.9%	4.9%	.0%	1.6%	34.4%	
Disagree	Count	0	3	1	0	0	4	3.3%
	% within phase	.0%	4.9%	1.6%	.0%	.0%	6.6%	
Strongly disagree	Count	0	1	1	0	0	2	1.6%
	% within phase	.0%	1.6%	1.6%	.0%	.0%	3.3%	
No answer	Count	0	1	0	0	0	1	1.6%
	% within phase	.0%	1.6%	.0%	.0%	.0%	1.6%	
Total	Count	2	47	9	1	2	61	100.0%
	% within phase	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Mean score:		4.00	3.46	3.11	4.00	3.50	3.43	

Q19.a If you disagree with this proposal please explain why.

Many of our pupils travel some distance to attend this school.

Small rural schools have already been negatively affected by lost of small school funding, many may be just outside of the 'measure' but many parents still chose to send their child to a school a further distance than 2 miles

There are times when village schools have low numbers for a number of years and then increase for all sorts of reasons especially if on the county boundary. Schools could disappear and then be needed again.

Q20 How far do you agree or disagree with the proposal to cap those schools that gain in order to fund the Minimum Funding Guarantee?

		Nursery school	Primary	Secondary	Special	UTC and Free School	Total	Total Combined %
Strongly agree	Count	1	6	4	1	0	12	77%
	% within phase	1.6%	9.8%	6.6%	1.6%	.0%	19.7%	
Agree	Count	1	30	4	0	0	35	15%
	% within phase	1.6%	49.2%	6.6%	.0%	.0%	57.4%	
Neither agree nor disagree	Count	0	7	0	0	2	9	8%
	% within phase	.0%	11.5%	.0%	.0%	3.3%	14.8%	
Disagree	Count	0	3	0	0	0	3	8%
	% within phase	.0%	4.9%	.0%	.0%	.0%	4.9%	
Strongly disagree	Count	0	1	1	0	0	2	8%
	% within phase	.0%	1.6%	1.6%	.0%	.0%	3.3%	
Total	Count	2	47	9	1	2	61	
	% within phase	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Mean score:		4.50	3.79	4.11	5.00	3.00	3.85	

Q20.a If you disagree with this proposal please explain why.

Each school should manage its own finance.
How as 1.5% been arrived at? Last year it was 4.2%. Smaller schools benefit more and the bigger schools often located in larger towns and urban areas with a far different mix of children are disadvantaged.

Q21 How far do you agree or disagree with the proposal to de-delegate Facilities Time?

		Nursery school	Primary	Secondary	Special	UTC and Free School	Total	Total Combined %
Strongly agree	Count	0	0	0	0	0	0	34%
	% within phase	.0%	.0%	.0%	.0%	.0%	.0%	
Agree	Count	0	16	4	1	0	21	57%
	% within phase	.0%	26.2%	6.6%	1.6%	.0%	34.4%	
Neither agree nor disagree	Count	0	29	4	0	2	35	8%
	% within phase	.0%	47.5%	6.6%	.0%	3.3%	57.4%	
Disagree	Count	2	2	1	0	0	5	8%
	% within phase	3.3%	3.3%	1.6%	.0%	.0%	8.2%	
Strongly disagree	Count	0	0	0	0	0	0	8%
	% within phase	.0%	.0%	.0%	.0%	.0%	.0%	
Total	Count	2	47	9	1	2	61	
	% within phase	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Mean score:		2.00	3.30	3.33	4.00	3.00	3.26	

Q21.a If you disagree with this proposal please explain why.

As we have no very 'active' union members to support
I'd rather be in control of all allocated funding
Union representation should be paid within HR services on an ad hoc basis. Some school may only be interested in this if they carry out bad HR practice in school resulting in disputes regularly
Unsure of what services this cover and if amount is justified

Q22 How far do you agree or disagree with the proposal to de-delegate School Contingency?

		Nursery school	Primary	Secondary	Special	UTC and Free School	Total	Total Combined %
Strongly agree	Count	0	3	0	0	0	3	39%
	% within phase	.0%	4.9%	.0%	.0%	.0%	4.9%	
Agree	Count	1	16	4	0	0	21	34.4%
	% within phase	1.6%	26.2%	6.6%	.0%	.0%	34.4%	
Neither agree nor disagree	Count	0	25	3	0	2	30	49%
	% within phase	.0%	41.0%	4.9%	.0%	3.3%	49.2%	
Disagree	Count	1	2	2	1	0	6	11%
	% within phase	1.6%	3.3%	3.3%	1.6%	.0%	9.8%	
Strongly disagree	Count	0	1	0	0	0	1	1.6%
	% within phase	.0%	1.6%	.0%	.0%	.0%	1.6%	
Total	Count	2	47	9	1	2	61	
	% within phase	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Mean score:		3.00	3.38	3.22	2.00	3.00	3.31	

Q22.a If you disagree with this proposal please explain why.

As we have no very 'active' union members,
I'd rather be in control of all allocated funding.
Unsure of what services this cover and if amount is justified
Schools Forum/LA should be able to use discretion on contingency

Q23 How far do you agree or disagree with the proposal to retain centrally £1,000,000 for the purpose of the Growth Fund?

		Nursery school	Primary	Secondary	Special	UTC and Free School	Total	Total Combined %
Strongly agree	Count	0	4	0	0	0	4	62%
	% within phase	.0%	6.6%	.0%	.0%	.0%	6.6%	
Agree	Count	2	26	6	0	0	34	55.7%
	% within phase	3.3%	42.6%	9.8%	.0%	.0%	55.7%	
Neither agree nor disagree	Count	0	8	1	1	2	12	20%
	% within phase	.0%	13.1%	1.6%	1.6%	3.3%	19.7%	
Disagree	Count	0	5	1	0	0	6	11%
	% within phase	.0%	8.2%	1.6%	.0%	.0%	9.8%	
Strongly disagree	Count	0	1	0	0	0	1	1.6%
	% within phase	.0%	1.6%	.0%	.0%	.0%	1.6%	
No answer	Count	0	3	1	0	0	4	6.6%
	% within phase	.0%	4.9%	1.6%	.0%	.0%	6.6%	
Total	Count	2	47	9	1	2	61	
	% within phase	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Mean score:		4.00	3.61	3.63	3.00	3.00	3.60	

Q23.a If you disagree with this proposal please explain why.

Agree in principal with the need for the growth fund but feel £1,000,000 is excessive
Because of the adverse impact on the other schools
centrally held funds belong in school budgets
We need the money now!

Q24 How far do you agree or disagree with the proposal not to retain central funding for the purpose of Falling Rolls?

		Nursery school	Primary	Secondary	Special	UTC and Free School	Total	Total Combined %
Strongly agree	Count	0	0	0	0	0	0	41%
	% within phase	.0%	.0%	.0%	.0%	.0%	.0%	
Agree	Count	0	21	4	0	0	25	31%
	% within phase	.0%	34.4%	6.6%	.0%	.0%	41.0%	
Neither agree nor disagree	Count	1	16	1	0	1	19	20%
	% within phase	1.6%	26.2%	1.6%	.0%	1.6%	31.1%	
Disagree	Count	1	5	1	1	0	8	20%
	% within phase	1.6%	8.2%	1.6%	1.6%	.0%	13.1%	
Strongly disagree	Count	0	2	2	0	0	4	20%
	% within phase	.0%	3.3%	3.3%	.0%	.0%	6.6%	
No answer	Count	0	3	1	0	1	5	20%
	% within phase	.0%	4.9%	1.6%	.0%	1.6%	8.2%	
Total	Count	2	47	9	1	2	61	20%
	% within phase	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Mean score:		2.50	3.27	2.88	2.00	3.00	3.16	

Q24.a If you disagree with this proposal please explain why.

As this is always a possibility there should be central funding available should help in the short-term
Development of good staff is lost if redundancies have to be made.
Falling roles should be managed within a 3 year budget plan by all schools
Falling rolls is a concern for some schools and this should be addressed in funding reforms.
Funding should be retained to assist schools with falling rolls. However, it should only be used to help high performing schools.
Small rural schools often suffer from very small cohorts which affect future funding based on falling numbers
Support should be identified centrally and used in consultation with area/school
The destabilising impact of changing age ranges in the Dunstable area will have a detrimental effect upon many schools resulting in a budget shortfall - not of their making.
We always need to think to the future 25% extra primary places required in the next two years?

Q25 Do you have any other comments about the proposals for sc...

An OFSTED outstanding rural school should be properly funded to ensure that all pupils within its area receive the best possible resources and ensure the best outcomes for our children. Schools should not be any more financially worse off than academies.
By 'replacing' deprivation funding with Pupil Premium, the funding is not being directed where it is needed most. Having lost £125,000 last year with the changes in deprivation calculations, our pupil numbers are set to increase even more over the course of the next four years, meaning that an additional teacher will need to be paid for in September 2014. Assuming that an NQT costs the school £27,529 and, according to the financial model supplied by CBC, our budget will be reduced by £19,576, this actually represents a total reduction of £47,105. While the Financial Model shows us as 1.4% reduction year on year, in reality my figures calculate us at 9.3%
Deprivation? If a school area has no deprivation at all according to IDACI and therefore receives no funding for this but does have children who are in this category they receive no help at all especially if they do not qualify for Free School Meals as is usual. SEN? IDACI and Pupil Premium do not help fund a school that has high levels of special needs but is not in an area of deprivation especially when parents choose the school because of high standards for SEN. Support for LAC? We have a child who has arrived from another county who was funded as LAC and FSM. They are now living with a relative who works so the child suddenly receives no extra funding what-so-ever LAC or Pupil Premium despite having significant behavioural and educational needs. We will not even receive any funding for 2 terms as the child started in September.
Growth fund is important for schools expanding and having to change their management structure to maintain performance. It should not be used by schools who have opted to change their structure.
Having prepared a balanced budget for the next 2 years it is going to be exceedingly difficult with just six months until the start of the next financial year to manage (for the second successive year) the massive drop in the anticipated budget allocation. Schools affected by these changes should be advised and supported to effectively manage this reduction without unduly impacting on their pupils' education. It cannot be right that the changes set in motion by other schools should be allowed to have such a detrimental impact. Once again pupils' life chances are being treated in a cavalier fashion.
I think it is imperative (and right) that schools that have changed their age range should receive funding for their new year groups during the year in which they start i.e. removing the lagged funding process. This would ensure that all of the children in Central Bedfordshire receive the best possible education as a result of appropriate staffing, resources etc. This would also support schools to maintain/improve standards. It would be unfair for identified groups of children to be educationally disadvantaged simply because they had remained at their school or moved to an alternative school.
I think that in the exceptional premises factors there should be some recognition of schools that have exceptional site costs for listed buildings.
Lancot's Governing Body are concerned about the level of funding for it's Specialist Provision. If the ring-fenced funding is AWPU based the concern is that funding levels will be reduced year-on-year. Any reduction in funding will negatively impact on staffing levels possibly resulting in a reduction of available pupil places. In 2015 when the national formula is introduced, will Provision funding be reduced further?
Much confusion remains over SEN/ Statementing/ High Needs Block funding
Must be a greater emphasis on disadvantaged children and those with behavioural needs as this has a huge impact on staffing and support in the classroom. It is so difficult to obtain a statement for really needy children but no financial support is given to schools. Our staff are really stretched when so many pupils can only function 1:1
My main purpose in responding to this consultation is to support the proposal for a rent factor, the lack of which has had an excessive effect on our budget at this school, and which is very unfair on us and our pupils. Attempting to compensate for this has also created a lot of work this financial year which I would hope not to have to repeat.
Section 17 states that schools will be expected to fund the first £6000 for high needs pupils. Is this for the total annual amount a school spends or for each child per year? This is not acceptable and should be changed. If a small school has more than one child with a statement this would have a serious impact on the schools budget.
Sufficient thought needs to be given to schools with rising rolls or age range changes so that they can provide for their pupils
The criteria for growth funding should be opened to include schools that are in areas of growth, but have improved and are growing due to parental preference.
This is a very small school and we obviously have concerns that if our roll decreases we will not be able to maintain staffing levels which would impact on standards. We believe that small schools have an important place in the community and supporting the children within it.

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Growth Funds – Background	
1.	<p>Funds can be retained from the Schools Block before allocating formula, with agreement of School Forum, for funding;</p> <ul style="list-style-type: none"> <input type="checkbox"/> significant pre-16 pupil growth <input type="checkbox"/> expenditure incurred to enable schools to comply with Infant Class Size Regulations <p>Revenue funding for pre statutory pupil growth is provided through the Early Years block and is not therefore covered by this Growth Fund.</p>
2.	<p>The conditions applying to this funding set out by the DfE are:</p> <ul style="list-style-type: none"> <input type="checkbox"/> any retained funding would benefit both maintained schools and academies; <input type="checkbox"/> any funds remaining at the end of the year are added to the following year’s DSG and reallocated to schools and academies; <input type="checkbox"/> clear criteria need to be determined; <input type="checkbox"/> the Schools Forum need to agree both the criteria and the overall amount, and be updated on the allocations
3.	<p>For 2014/15 the Growth Fund has been established as requiring £1M.</p>
Significant pre 16 pupil growth	
4.	<p>This factor refers to instances where the Local Authority commissions new school places as a new school or equivalent new split site school provision or as permanent or temporary increases to an existing school site (i.e. to accommodate a bulge year). It provides funding for pre opening costs of establishing significant new provision and also protects against the potential financial impact of admissions falling short of the agreed additional capacity by providing place led guarantees.</p> <p>Qualifying provision includes:</p> <ul style="list-style-type: none"> <input type="checkbox"/> new schools <input type="checkbox"/> expansions to existing schools on additional sites <input type="checkbox"/> temporary or permanent expansions to existing schools on their current sites <p>Where necessary, Capital funding for these increases is allocated by the Council’s School Organisation, Admissions and Capital Planning Team, through a commissioning process that is beyond the scope of the Growth Fund.</p>
5.	<p>There are a range of revenue issues associated specifically with the establishment of New Schools and the equivalent scale of expansion of existing schools on additional sites. These include:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Funding for the initial set up costs of a school <input type="checkbox"/> Funding for the inefficiency of a new school or school site, as it builds to full capacity

6.	<p>The initial revenue set up costs of a new or split site school will be varied but may include those associated with:</p> <ul style="list-style-type: none"> • Project management support • Administration and Legal assistance • Advice on establishing HR, Admissions, Finance and other policies • Governance induction and training • Lead in year (pre opening) staff • Curriculum resources (consumables, not furniture, fixtures and equipment) i.e. text books
7.	<p>Where necessary, a range of set up costs will also be met from capital expenditure associated with the main construction project, for example 'Fixed Furniture & Equipment' (FF and E), temporary site/office accommodation etc</p>
8.	<p>The speed with which a new school or site will fill and the choice of method of implementation i.e. annual growth upward from the school's normal admission point of entry until expansion is complete in all year groups, or across all year groups simultaneously, will differ depending on a range of circumstances. These include:</p> <ul style="list-style-type: none"> • The specifics of the local demographic • The rate of continued demographic growth • The capacity of local schools • The timing of the expected opening of the new school or site and • The need to limit turbulence caused in the wider schools system
9.	<p>For schools which are expanding onto additional sites, the purpose of and eligibility for the Split Site Factor, once the school is open, must be taken into account in determining the additional costs associated with the need to expand leadership and management structures.</p>
10.	<p>Where the Council commissions permanent or temporary increases to an existing school site similar factors may apply depending on the scale of the planned increase in comparison with the original capacity of the school.</p>
11.	<p>Any place led funding guarantee to protect against the possibility that the new places do not fill can only therefore be determined through discussion between the school, Children's Services Finance and the School Organisation, Admissions and Capital Planning Team, informed by forecasts of pupil numbers, occupation rates in new developments and other relevant data.</p>
12.	<p>In order to be financially sustainable and not to represent a financial burden on the school as a whole, any new class should have a minimum of 25 pupils and schools will therefore be compensated for the difference between actual pupils up to the target number of 25.</p>

13.	Given the variables that need to be considered in each instance, an application and assessment process for pre opening costs and for place led funding is therefore recommended for schools who qualify for Growth Fund, under the Pre 16 Pupil Growth criteria. Application documentation has been developed for schools to ensure transparency, accountability and that appropriate challenge and assessment can be undertaken in all instances.
14.	Assessment will be undertaken by a panel consisting of Council Officers representing Children’s Services Finance and the School Organisation, Admissions and Capital Planning Team, in addition to two members of the School Forum, nominated on an annual basis by the Forum. Approval for successful applications will be given under delegated authority from the School Forum by the Deputy Chief Executive/Director of Children’s Services.
15.	Successful applications will be reported to the School Forum as is required by Regulation.
Infant Class Size regulation	
16.	The School Standards and Framework Act 1998 (Sections 1- 4) provided that all schools with infant pupils must organise their Key Stage 1 classes to ensure that they contain no more than 30 pupils for all ordinary teaching sessions taught by a single qualified teacher from September 2001. In some schools, this may require the creation of an additional class or a withdrawal group, vertical grouping of pupils or the presence of a second teacher to team-teach the class. Some schools may look to a combination of these options to achieve the statutory infant class size limit.
17.	<p>The Regulations specify that:</p> <p>No child attaining the age of 5, 6 or 7 during the course of the academic year should be in an infant class of more than 30 pupils. A class is covered by the limit if the majority of pupils in the class are infants.</p> <p>The limit applies to all ordinary teaching sessions. The only occasions where more than 30 pupils are permitted are music, drama and PE/games. Assemblies are also excluded from the class size limit.</p> <p>The limit applies to all infant classes taught by a single qualified teacher. An infant class can contain more than 30 pupils if there are two qualified teachers present, but there must not be more than 30 pupils for one teacher.</p>
18.	<p>Mixed key stage classes:</p> <p>a) In a mixed Year 2/3 class, where the majority of pupils are junior aged children, the class is not covered by the Class Size Regulations and it can operate with more than 30 pupils. However, if the majority of pupils are infants, the statutory limit on infant class sizes is applicable.</p> <p>b) In a mixed Nursery/Reception class (Foundation Unit) where the majority of pupils are nursery aged children, the class is not covered by the Class Size</p>

	<p>Regulations and it can operate with more than 30 pupils. However, should the majority of pupils be reception aged pupils, the statutory limit on infant class sizes is applicable.</p>
<p>19.</p>	<p>Additional children may be admitted under very limited exceptional circumstances. The School Admissions (Infant Class Sizes) (England) Regulations 2012 which came into force from 1 February 2012 have revised the permitted exceptions originally established in 2001 and further amended in 2006.</p>
<p>20.</p>	<p>The excepted children are:</p> <ul style="list-style-type: none"> children with statements of special educational needs admitted outside the normal admission round; looked after children and previously looked after children admitted outside the normal admission round; children admitted, after initial allocation of places, because of a procedural error made by the admission authority or local authority in the original application process; children admitted after an independent appeals panel upholds an appeal; children who move into the area outside the normal admission round for whom there is no other available school within reasonable distance; children of UK service personnel admitted outside the normal admission round; twins and children from multiple births when one of the siblings is the 30th child admitted; children with SEN who are normally taught in an SEN unit attached to the school, or registered at a special school, who attend some infant classes within the mainstream school.
<p>21.</p>	<p>Any agreed exception to the statutory infant class size limit will apply for the whole period of a child's time in the infant classes or until the class numbers fall back to the admission number. Should a child leave during this time, the school is not permitted to 'back fill' any place(s).</p>
<p>22.</p>	<p>Any school that exceeds its published admission number by admitting a child without there being a formal independent appeal or without the prior agreement of the Council under the Exceptions Regulations, which cannot meet the statutory limit on infant class sizes, will be required to find any additional funding to comply with the regulations from its budget share.</p>
<p>23.</p>	<p>In October each year, the Council's School Organisation, Admissions and Capital Planning Service will use the DfE Autumn Term Census Return and check the following to ensure each school:</p> <ul style="list-style-type: none"> a) Complies with the infant class organisation (i.e. Reception, Year 1 and 2),

	<p>b) Has not exceeded their admission number as published in the Council's Admission booklet, for any infant age group.</p> <p>This exercise will be repeated following the January School Census Return.</p> <p>NOTE:</p> <p>i. Where a pupil has been admitted following the decision of an independent appeal hearing, academies and own admission authority schools will be required to provide, the date of the appeal hearing, the name of the child admitted and whether the case presented was on class size prejudice or ordinary prejudice grounds, unless the appeal was presented by the Council. For Community and VC schools, only the name of the child will need to be supplied.</p> <p>ii. Where it has been agreed with the Council that the admission meets one of the very limited circumstances specified in the Exception Regulations, the school will be expected to provide the details of the individual case.</p>
<p>24.</p>	<p>Where a school is unable to comply with the Regulations without reorganising classes (this could be a mixed nursery/reception class and/or a mixed Year 2/Year 3 class) and incurring additional costs associated with the employment of further teaching staff, it can make an application to the Council setting out its specific circumstances. The deadline for applications to be received by the Council's School Organisation, Admissions and Capital Planning Service will be the end of November of each academic year.</p>
<p>25.</p>	<p>However, the following conditions will apply:</p> <p>1) Schools with fewer than 30 Key Stage 1 pupils will not be eligible for infant class size funding as the lump sum in the funding formula is deemed to provide sufficient resources for one infant class in any Lower School.</p> <p>2) Schools who have a total number of Key Stage 1 pupils within five of multiples of 30 will not be eligible for infant class size funding as they are also deemed to have sufficient resources within their delegated budgets to organise all infant classes at 30 pupils or less e.g. 55, 85, 115 infant pupils – no infant class size funding. Therefore the qualifying class will only be funded up to a maximum of 25 places.</p> <p>3) Any application will trigger a review of the school's Published Admission Number (PAN)</p> <p>4) Any successful application will only be guaranteed for one academic year, with a new application required in the following academic year.</p> <p>5) Small schools with less than 90 NOR will be expected to consider a mix of Key Stages</p> <p>6) Schools are expected to first utilise their reserves for the additional costs of employing an additional teacher, before infant class size funding will be considered.</p>
<p>26.</p>	<p>The application will be considered by the Panel referred to in Sec. 14 above and successful applications will be reported to the School Forum.</p>

27.	<p>For successful applications infant class size funding will be allocated where total key stage one numbers in October are more than 5 short of the next higher multiple of 30. Key stage one funding will be allocated for each “ghost place” to take the last multiple to 25. Total funding will be calculated as the number of “ghost pupils” multiplied by a reduced AWPU value of £1,272. Examples are given below.</p>
	<p><u>Example 1</u></p> <p>a) Anticipated numbers for October census as assessed by Admissions team in June 2013 following new Year R intake offers : - Reception = 80, Year 1= 80, Year 2 = 57, Total KS1= 217</p> <p>b) In order to meet infant class legislation school has to plan for 8 classes of no more than 30 in a class across KS1 i.e. based on 240 pupils. (Without infant class legislation school could have operated 7 classes of 31.)</p> <p>c) $240 - 217$ less threshold of 5 = 18 “ghost pupils”</p> <p>18 “ghost pupils” x AWPU to help fund 8th class.</p>
	<p><u>Example 2</u></p> <p>a) Anticipated numbers for October census as assessed by Admissions team in June 2013 following new Year R intake offers : - Reception = 80, Year 1= 80, Year 2= 75, Total KS1= 235</p> <p>b) In order to meet infant class legislation school has to plan for 8 classes of no more than 30 in a class across KS1 i.e. based on 240 pupils. (Without infant class legislation school could in theory have operated 4 classes of 34 and 3 at 33, but this is unlikely)</p> <p>c) $240 - 235$ less threshold of 5 = 0</p> <p>School does not receive any additional funding as probably would have operated 8 classes anyway.</p>
	<p><u>Example 3</u></p> <p>a) Anticipated numbers for October census as assessed by Admissions team in June 2013 following new Year R intake offers : - Reception = 12, Year 1= 12, Year 2 = 12, Total KS1= 36</p> <p>b) In order to meet infant class legislation school has to plan for 2 classes of no more than 30 in a class across KS1 i.e. based on 60 pupils.</p> <p>c) $60 - 36$ less threshold of 5 = 19 “ghost pupils”</p> <p>19 “ghost pupils” x AWPU to help fund 2nd class.</p>
28.	<p>Any queries relating to Infant Class Size regulations should be referred to the Council’s School Organisation, Admissions and Capital Planning Service on 0300 300 8037.</p>

Meeting: Schools Forum
Date: 14th October 2013
Subject: Dedicated Schools Grant (DSG)
Report of: Deputy Chief Executive and Director of Children's Services
Summary: To note the update on the DSG

Contact Officer: Dawn Hill, Technology House

Public/Exempt: Public

Wards Affected: All

Function of: Council

Reason for urgency
(if appropriate)

RECOMMENDATIONS:

1. To note the update

Background

1. Since the beginning of the financial year 2006/07 local authorities have received allocations of DSG to finance the Schools Budget in each authority. The full DSG received must be applied to the Schools Budget in each authority; although authorities may provide additional resources in support of the Schools Budget should they decide to do so. From 2013/14 the Dedicated School Grant is split into three notional blocks; Early Years, High Needs and Schools.
2. The Early Years and School Finance (England) Regulations define the local authority education budgets (the non-schools education budget, the schools budget, the central expenditure and the individual schools budget) and set out how local authorities are to allocate funding from the individual schools budget (ISB) to maintained schools and private, voluntary and independent providers of free early years provision (relevant early years providers) through a locally determined formula. These Regulations relate only to the 2013/14 financial year.
3. The Regulations give effect to the decisions made to reform the school funding system through simplified local formulae, greater delegation to schools and new arrangements for funding pupils with high needs.
4. The Minimum Funding Guarantee (MFG) for schools has been set at negative 1.5% per pupil for 2013/14. The calculation has been simplified compared with previous years and the Regulations set out the factors which are excluded from the calculation.
5. The Chief Finance Officer (CFO), must sign two statements annually: the Actual deployment (out-turn) and Budgeted Allocation of the DSG, confirming that it has been fully deployed in support of the School's Budget in accordance with the condition of the grant and The Early Years and School Finance Regulations.

Deployment of DSG 2012/13

6. The deployment of 2012/13 DSG represented in the table below, was discussed and agreed by Schools Forum at their meeting of the 24th June 2013.

DSG	Academies		Revised DSG	ISB	Central Spend
£'000	ISB £'000	LACSEG £'000	£'000	£'000	£'000
174,835	68,175	262	106,398	95,041	11,357

DSG Budget Allocation 2013/14

7. The Department for Education announced on the 19 December 2012 the School Funding settlement for 2013/14 including allocations for the DSG and illustrative allocations for the Pupil Premium. The Pupil Premium is set at £900 and Service Premium at £300 per pupil, and final allocations will be confirmed shortly.
8. The Department also announced a new grant, the Education Services Grant, which will replace the LA Block element of LACSEG for Academies, and the corresponding element of LA revenue funding, from 13/14.
9. There is no change to the distribution of the DSG and it is based on the spend plus' Methodology for 2013/14 but the presentation of the settlement is shown in three spending blocks (Early Years, Schools and High Needs).
10. The following table illustrates the updated DSG allocation for each block and additions. The Schools block is based on October 2012 School census and the Early Years block has been updated for the January 2013 census.

Block		Initial Allocation December 2012 (£M)	Revised Allocation July 2013 (£M)
Schools		144.008	144.008
Early Years		9.850	9.635
High Needs	Pre 16	21.268	21.541
	Post 16	1.344	1.762
Transitional Funding (floor protection for 3 year olds)		0.050	0.050
2 Year Olds (grant transfer from RSG previous EIG)		1.793	1.793
NQT (transferred from RSG)		0.053	0.053
Total Allocation DSG		178.366	178.842

11. The Schools Block is based on a per pupil unit of funding of £4,144.47 multiplied by 34,747 pupils as reported on the October 2012 census.
12. The Early Years block is based on a unit of funding of £3,979.80 multiplied by 2,421 full time equivalent number of pupil as reported on the January 2013 census. The Early Years block will be updated again in April 2014 for 7/12ths of the January 2014 pupil numbers to cover the period September 2013 to March 2014.

13. The High Needs Block is a single block for high needs pupils/students age 0- 24. For 2013/14 the Block has been calculated in two parts, pre 16 and post 16 (age 16-24). The post 16 combines three previous budgets, SEN Block Grant, Specialist placements funding and the cost of high needs student in Further Education (FE). The new system for funding post 16 students was introduced August 2013.
14. The floor protection for 3 year olds has reduced by £48k from the 2012/13 funding and will be completely removed in 2014/15.
15. The 2013/14 funding for early education places for 2 year olds from lower income households, previously funded through Early Intervention Grant, has now merged into the DSG. It is to fund Statutory Places (£1,288k) and 'trajectory building' (£505k) to create non-statutory places in preparation for the increased entitlement. Allocations have been calculated based on the estimated number of eligible 2 year olds likely to receive provision in the area, using Free School Meals data for 4 to 6 year olds as a proxy.
16. Funding for the cost of monitoring and quality assuring NQT induction has also been transferred into the DSG and for CBC is £53k, Nationally £10M has been reduced from the Education Support Grant to fund this.
17. The following table represents the distribution of the 2013/14 DSG based on the Academy conversions as at September 2013 (44).

Blocks	DSG	ISB Academies	Revised DSG	ISB Schools	Central Spend
	£'000	£'000	£'000	£'000	£'000
Schools	144,062	75,960	68,102	66,768	1,334
EY	11,478	0	11,478	9,367	*2,111
High Needs	23,302	1,268	22,034	9,577	*12,457
Total	178,842	77,228	101,614	85,712	15,902

* Includes Early Years (£282k) and High Needs (£2,471k) paid directly to Academies by the LA.

18. The centrally retained DSG of £15.9M is further analysed in the table below.

Services	DSG £'000
Special Education Needs (Inc Post 16)	8,867
Academies Statements/Early Years	2,752
Two Year old Funding	1,793
Growth Fund	800
DSG Contribution to Central Overheads	719
Pupil Referral Unit	409
Access to Education	260
School Contingency	127
CLA	84
Teachers Unions & Professional Associations	64
Early Years Contingency	24
School Forum	3
Total CE	15,902

Growth Fund 2013/14

19. The Early Years and Schools Finance (England) Regulations, Schedule 2, prescribes expenditure that may be deducted from the Schools budget before determining the Individual Schools Budget and held centrally.

20. The Growth Fund falls into this category and is for the purpose of :
 - Expenditure to be incurred due to a significant growth in pupil numbers as a result of the local authority's duty under section 13(1) of the 1996 Act to secure that efficient primary education and secondary education are available to meet the needs of the population of their area, but only where the authority has set criteria for determining the circumstances in which the expenditure can be incurred and the basis for calculating the amount of any such expenditure.
 - Expenditure to be incurred in order to make provision for extra classes in order to comply with the School Admissions (Infant Class Sizes) (England) Regulations 2012(b).

21. 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. This was agreed with the School Forum at their meeting of 26 November 2012. In addition, at the March 2013 School Forum meeting, members were asked to nominate representatives that would sit on the panel to review applications for funding

22. Two panel meetings have taken place, one for Growth Fund bids and the second for Infant Class Size (ICS) funding applications.

23. The following table sets out the approved expenditure to 30th September 2013

School	Growth Fund	ICS Fund	Total
2013/14 Allocation			800,000
Fairfield Park Lower	(130,168)		
Greenleas Lower	(314,794)		
Church End Lower	(69,071)		
Gothic Mede Lower	(40,712)		
Houghton Regis Lower		(27,984)	
Total	(554,745)	(27,984)	(582,729)
Balance remaining			217,271

Appendices:

None

Meeting: Central Bedfordshire Schools Forum
Date: 14 October 2013
Subject: Revised Membership of the Central Bedfordshire Schools Forum
Report of: Mel Peaston, Committee Services Manager
Summary: This report advises of the changes to membership of Schools Forums as identified in the Schools Forum (England) Regulations 2012.

Advising Officer: Mel Peaston, Committee Services Manager
Contact Officer: Martha Clampitt, Committee Services Officer
Public/Exempt: Public
Wards Affected: None
Function of: Council

CORPORATE IMPLICATIONS

Council Priorities:

- Improved educational attainment.

Financial:

1. N/A

Legal:

2. The Constitution and Terms of Reference of the Schools Forum were previously drawn up to comply with Regulations issued in 2010. New Regulations were issued in 2012.

Risk Management:

3. N/A

Staffing (including Trades Unions):

4. N/A

Equalities/Human Rights:

5. To ensure that any decision does not unfairly discriminate, public authorities must be rigorous in reporting to Members the outcome of an equality impact assessment and the legal duties.

6. Public Authorities must ensure that decisions are made in a way which minimises unfairness, and without a disproportionately negative effect on people from different ethnic groups, disabled people, women and men. It is important that Councillors are aware of this duty before they take a decision.

Public Health

7. N/A

Community Safety:

8. N/A

Sustainability:

9. N/A

Procurement:

10. N/A

RECOMMENDATION(S):

The Forum is asked to:

note the change of membership to the Forum required by the Department for Education as detailed in their report, titled School Funding Reform: Findings from the Review of 2013 to 2014 - Arrangements and Changes for 2014 to 2015, for a post 16 education representative in place of the existing Local Authority 14 – 19 Partnership representative.

Information

11. The Central Bedfordshire Schools Forum Constitution and Terms of Reference has previously been amended to comply with the provisions of The Schools Forum (England) Regulations 2010. New Regulations were issued in 2012, which include a requirement to comply with the membership provisions by 1 October 2012.
12. The Forum has accordingly updated its membership provisions and the Constitution and Terms of Reference were reviewed and updated 24 January 2013 (minute CBSF/12/85 refers). The current Constitution and Terms of Reference document is attached at Appendix A. The Department for Education's report: The School Funding Reform: Findings from the Review of 2013 to 2014 – Arrangements and Changes for 2014 to 2015 can be found on the Department for Education's website. Pages 23 and 24 of that report which refer to Schools Forums are attached at Appendix B.

13. The Forum is therefore asked to review the Constitution and Terms of Reference attached at Appendix A, which has been amended in line with the 2012 Regulations, and propose any further amendments so that the document can be re-drafted and brought back to the next meeting for approval.

Appendices: Appendix A – Constitution and Terms of Reference

Appendix B – The School funding reform: findings from the review of 2013 to 2014 – arrangements and changes for 2014 to 2015 (pages 23 and 24)

Background Papers: (open to public inspection) None

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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 Elected representative Post 16 education provider (not a school or academy)
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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89. One solution cited a number of times was to allow the local authority's contingency fund to be used to support schools with falling rolls.

Approach for 2014-15

90. We want to ensure that good schools with short term falling rolls receive sufficient funding to deliver an appropriate curriculum and to avoid the need to take costly steps to reduce their capacity, when the demographic data shows that their capacity will need to expand again in the near future. It would be inefficient for example to make redundancies because of short term falling rolls, only to need to employ staff again when rolls increase. We therefore intend to allow some additional support for schools in this situation from 2014-15. We have developed a solution which can be simply managed and which offers a safeguard for all school types. **We will enable local authorities, using top-sliced DSG funding, to create a small fund to support schools with falling rolls in exceptional circumstances.**

91. We will expect the use of the fund to be considered at planning area level and Schools Forums will assess applications. As with the basic need growth fund, the criteria and amount must be agreed by the Schools Forum and applied fairly to academies and maintained schools. We are clear that we do not intend that this funding is provided to support schools which have falling rolls because they are unpopular or of low quality. Therefore we will ask local authorities to apply criteria which restricts use of the fund to schools that are considered by Ofsted to be good or outstanding.

92. The operational guidance sets out the criteria which will be applied to the falling rolls fund.

Schools Forums

Approach in 2013-14 and Review Findings

93. The new Schools Forum regulations came into effect on 1 October 2012. These have improved the transparency and independence of Schools Forums.

94. We asked in the February consultation document whether Schools Forums were now operating more democratically and transparently and if not, what further steps the Department could take in order to improve this.

95. The majority of responses suggested that either the changes had not altered the operation of the forum as it was already working well and in line with the new regulations, or that the new regulations had led to improvements in democracy

and transparency.

96. There were a number of concerns which were expressed. Where respondents felt their Schools Forum was not working as well as it should, this was largely due to representatives not cascading information among their constituents or not having time or a sufficient level of understanding to play an active part as a member of the forum.
97. We also heard views from institutions providing education for students between the ages of 14 and 25 (such as further education colleges) that have an interest in local decisions regarding high needs funding and funding for pupils who are educated in further education provision from age 14. They were concerned that, despite this, there is no statutory place for such institutions.

Approach for 2014-15

98. We are clear that Forums must operate transparently and fairly. We will continue to monitor Forums to ensure that they are implementing all aspects of the revised regulations. We will also re-issue the good practice guide. If we find that local authorities have not been adhering to the regulatory requirements (which include publishing papers on websites), then we will consider taking further action.
99. We will be making one change in relation to the Schools Forums regulations in 2014-15 (on which we will consult). **We will require that all Forums include one elected representative from an institution (other than from a school or academy) providing education beyond age 16 (but may also be providing education for 14-16 year olds). This will replace the current requirement for a representative from the 14-19 partnership.** We will make this change at the same time as we revise the School Funding Regulations.