

Appendix A

TECHNICAL FUNDING SUB-GROUP OF SCHOOLS FORUM – 13th July 2009 – Notes & Further Action

Members Present

Neil Bramwell (Upper School)
Jim Smart (Lower School)

Apologies

Ian Greenley (Diocese)

Members not Present

Shirley-Anne Crosbie (Special School)
Middle School Representative (Ian Mitchell invited, no response)

Officers Present

Kevin Green
Dawn Hill
Gezim Leka

INTRODUCTION

- The Sub-Group was established the previous School Forum, to examine, report back and make recommendations to the Children's Families and Learning Directorate Management Team and the full Schools' Forum.
- Neil Bramwell and Shirley-Anne Crosbie volunteered at the SF meeting and this was agreed. It was also suggested that Jim Smart be invited to attend. Officers were concerned that 3 members was not sufficient representation, particularly if not all were available for a meeting. It was agreed through the SF Chair to invite 2 further members 1) Ian Greenley who had previously at on the Deprivation Review Sub-Group and represents cross phase and 2) a middle school representative. Ray Payne felt he could not commit to another group and Ian Mitchell was invited.
- The initial remit of the group was to look at 3 particular issues
 - Significant mobility outside of natural transition stages for children of services personnel
 - "ghost funding" tapering (current "cliff-edge" funding)
 - Deprivation – thresholds and tapering (current "cliff-edge" funding)
- The purpose of the meeting was to look at the above issues and scope work to be carried out by finance over the summer, with a further meeting early next term. An update should go to the next SF, with any recommendations to SF for 2010-11 to be made to this meeting, or January meeting at the latest. When considering the timing of any changes the Sub-group/DLT/SF would need to consider the impact on indicative budgets already issued for 2010-11, as well as any changes from 2009-10. The national review of DSG distribution to LAs would also need to be taken into account, in respect of specific factors and any central direction (e.g. re deprivation funding)

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CHILDREN OF SERVICE PERSONNEL

- Representations have been made from Campton Lower School, with regards the high level of pupil mobility, outside of normal transitions. There is correspondence from the Headteacher setting out the consequences of this and dealing with service children generally. KG referred to a useful paper from CEAS (Children's Education Advisory Bureau) of MOD – KG will try and get hold of the relevant paper. KG referred to some benchmarking carried previously at BCC.
- The Campton Lower head would be happy to address a future meeting if needed.
- The Sub-Group agreed that there should be further research over the summer and the next meeting to consider the educational case, benchmarking and any associated costing at the next meeting.

“GHOST” FUNDING

- Currently “Ghost” Funding is given for pupils aged 4 to 6, to the next multiple of 30. This can create a “cliff-edge” with say 31 pupils plus 29 “ghost places” one year, followed by 30 pupils, no “ghost places”, with a loss of some £30-£40k of funding. In theory a school should need one less teacher, in these circumstances.
- The Sub-Group had some discussion on what the appropriate transition funding might be. This was agreed to be 5/12 (approximation 40%) – being the funding April to August in the year of decrease. The school should be aware of the ghost funding impact from their January PLASC. This transitional funding would give the school until the start of the school year to make alternative staffing arrangements, if necessary.
- The Sub-Group agreed that finance should model options to:-
 - Calculate 40% transition paid from AWPU (all pupils, lower school pupils or 4-6 year old pupils)
 - Calculate 40% transition paid from the “ghost” funding “pot”. This amount is the historic amount available for this funding factor, uplifted for inflation.
 - The Sub-Group also requested that “Ghost” Funding be modelled based on a per pupil calculation, rather than dividing a specific “pot”. It was agreed that this would be based on M6 (top of scale for qualified teacher) plus on-costs divided by 30. Similar transition arrangements would be modelled, as above. (The Sub-Group was keen where possible to move from specific amounts for factors, divided by eligible pupils, to a fixed per pupil amount – with a transparent rationale such as this.)

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DEPRIVATION

- There were 2 separate but linked issues re. the thresholds for deprivation, based on Acorn Factors 4 and 5:-
 - A threshold of 20% was applied to each factor. This creates anomalies e.g. schools could have thresholds close to both thresholds and not receive any funding, alternatively they could breach one threshold and be very low on the other and receive substantial funding. The Sub-Group agreed that modelling should be carried out based on a combined weighted threshold of 25% (being all of category 5 and 1/3 category 4, this is consistent with the funding weighting of 3:1).
 - The thresholds provide “cliff-edged” funding is that they are absolute (all or nothing). The Sub-Group agreed that modelling should be carried out on tapering whereby if full funding is at the 25% threshold and above 24.00% to 24.99% would be at 90% funding, 23.00 to 23.99 would be at 80% etc etc ..to 16.00% to 16.99% would be at 10% funding.
 - One issue around percentage thresholds was that this seemed to work against larger (mainly upper) schools, with a mixed intake from a variety of socio-economic areas e.g. e.g. it was felt that at least 7 of 10 uppers had sufficient numbers of children in Acorn categories 4 & 5 to receive some deprivation funding, at least via tapering (the exceptions being Cedars, Harlington and Redbourne - there was a recognisable gap that could lead to the conclusion that if any upper school was to be excluded it would be them).
 - The Sub-Group requested a model that followed the child i.e. per pupil funding for all Acorn category 4 and 5 children. It is understood that this could well provide too much turbulence to indicative figures for 2010-11, but may be something that can be moved towards over time.
 - An alternative to the above would be a model which funds 50% based on the combined weighted threshold, with tapering and 50% to follow the pupil. Again, this may need to be done over time.
- Further discussion was around rural deprivation, being particularly applicable to Central Bedfordshire and whether this was sufficiently measured by Acorn. Acorn, like many indices is constructed by a “basket” of measures (around 60). A new, well received index produced by the DCSF is the Tax Credit deprivation indicator, which is now being used by some LAs. It came out too late for the Bedfordshire deprivation review. A review of the relevant indices would be a substantial undertaking, but should possibly be timed with the national formula review outcomes for 2011-12 onwards.

NEXT MEETING

- TBA (early September).