

# Public Document Pack

## NOTICE OF MEETING



# SCHOOLS FORUM

will meet on

**TUESDAY, 31ST JANUARY, 2017**

**At 2.30 pm**

in the

**ASCOT AND BRAY - TOWN HALL,**

TO: Head Teacher Representatives: Isabel Cooke, Richard Pilgrim (Chairman), Heidi Swidenbank, Helen McHale, Alison Penny, Nick Stevens (Vice-Chairman), Stuart Muir, Joolz Scarlett, Tony Dickens, Mike Wallace, Chris Tomes, Amanda Hough and Martin Tinsley.

Governor Representatives: Hugh Boulter and Jo Haswell.

Non- School Representatives: Gina Kendall and Anne Entwistle.

Karen Shepherd - Democratic Services Manager - Issued: 23/01/17

Members of the Press and Public are welcome to attend Part I of this meeting. The agenda is available on the Council's web site at [www.rbwm.gov.uk](http://www.rbwm.gov.uk) or contact the Panel Administrator **David Cook 01628 796560**

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## AGENDA

### PART I

| <u>ITEM</u> | <u>SUBJECT</u>  | <u>PAGE<br/>NO</u> |
|-------------|---|--------------------|
| 1.          | <u>APOLOGIES</u><br><br>To receive any apologies for absence.   |                    |
| 2.          | <u>DECLARATIONS OF INTEREST</u><br><br>To receive any declarations of interest.   | 7 - 8              |
| 3.          | <u>MINUTES</u><br><br>To approve the Part I minutes of the meeting held on 11 October 2015.   | 9 - 14             |
| 4.          | <u>DSG 2017-18 SETTLEMENT AND STRATEGY FOR MANAGING DSG<br/>IN FUTURE YEARS</u><br><br>To note the report.  | 15 - 28            |
| 5.          | <u>EARLY YEARS FUNDING FORMULA 2017-18</u><br><br>To consider the report.   |                    |
| 6.          | <u>2017-18 SCHOOLS BUDGET AND CENTRALLY RETAINED BUDGET<br/>PROPOSALS</u><br><br>To consider the report.  | 29 - 40            |
| 7.          | <u>NEW ASSESSMENT CRITERIA</u><br><br>To consider the report.   | To<br>Follow       |
| 8.          | <u>DSG 2017-18 SETTLEMENT AND STRATEGY FOR MANAGING DSG<br/>IN FUTURE YEARS</u><br><br>To approve the strategy.   | Verbal<br>Report   |
| 9.          | <u>OUTCOME OF DFE SECOND CONSULTATION ON NATIONAL<br/>FUNDING FORMULA</u><br><br>To consider the report.  | 41 - 50            |
| 10.         | <u>LOCAL GOVERNMENT ACT 1972 - EXCLUSION OF THE PRESS<br/>AND PUBLIC</u><br><br>To consider passing the following resolution:-<br><br>"That under Section 100(A)(4) of the Local Government Act 1972, the public<br>be excluded from the remainder of the meeting whilst discussion takes place |                    |

on the grounds that it involves the likely disclosure of exempt information as defined in Paragraphs 1-7 of part I of Schedule 12A of the Act"

**PRIVATE MEETING - PART II**

| <u>ITEM</u> | <u>SUBJECT</u>  | <u>PAGE<br/>NO</u> |
|-------------|---|--------------------|
| 11.         | <u>MINUTES</u><br><br>To approve the Part II minutes of the meeting held on 11 October 2016.<br><br><b><i>(Not for publication by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972)</i></b> | 51 - 52            |



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## MEMBERS' GUIDANCE NOTE

### DECLARING INTERESTS IN MEETINGS

#### **DISCLOSABLE PECUNIARY INTERESTS (DPIs)**

DPIs include:

- Any employment, office, trade, profession or vocation carried on for profit or gain.
- Any payment or provision of any other financial benefit made in respect of any expenses occurred in carrying out member duties or election expenses.
- Any contract under which goods and services are to be provided/works to be executed which has not been fully discharged.
- Any beneficial interest in land within the area of the relevant authority.
- Any license to occupy land in the area of the relevant authority for a month or longer.
- Any tenancy where the landlord is the relevant authority, and the tenant is a body in which the relevant person has a beneficial interest.
- Any beneficial interest in securities of a body where
  - a) that body has a piece of business or land in the area of the relevant authority, and
  - b) either (i) the total nominal value of the securities exceeds £25,000 or one hundredth of the total issued share capital of that body **or** (ii) the total nominal value of the shares of any one class belonging to the relevant person exceeds one hundredth of the total issued share capital of that class.

#### **PREJUDICIAL INTERESTS**

This is an interest which a reasonable fair minded and informed member of the public would reasonably believe is so significant that it harms or impairs your ability to judge the public interest. That is, your decision making is influenced by your interest that you are not able to impartially consider only relevant issues.

#### **DECLARING INTERESTS**

If you have not disclosed your interest in the register, you **must make** the declaration of interest at the beginning of the meeting, or as soon as you are aware that you have a DPI or Prejudicial Interest. If you have already disclosed the interest in your Register of Interests you are still required to disclose this in the meeting if it relates to the matter being discussed. A member with a DPI or Prejudicial Interest **may make representations at the start of the item but must not take part in discussion or vote at a meeting.** The term 'discussion' has been taken to mean a discussion by the members of the committee or other body determining the issue. You should notify Democratic Services before the meeting of your intention to speak. In order to avoid any accusations of taking part in the discussion or vote, you must move to the public area, having made your representations.

If you have any queries then you should obtain advice from the Legal or Democratic Services Officer before participating in the meeting.

If the interest declared has not been entered on to your Register of Interests, you must notify the Monitoring Officer in writing within the next 28 days following the meeting.

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# Agenda Item 3

## SCHOOLS FORUM

TUESDAY, 11 OCTOBER 2016

PRESENT: Head Teacher Representatives: Isabel Cooke, Richard Pilgrim (Chairman), Heidi Swidenbank, Helen McHale, Nick Stevens (Vice-Chairman), Stuart Muir, Joolz Scarlett, Tony Dickens, Mike Wallace and Martin Tinsley.

Governor Representatives: Hugh Boulter and Jo Haswell.

Non- School Representatives: Gina Kendall and Anne Entwistle.

Also in attendance: Councillor Richard Kellaway and Councillor MJ Saunders.

Officers: Alison Alexander, Kevin McDaniels, David Cook and for item 4 Debbie Verity and Geoff King.

### APOLOGIES

Apologies for absence were received from Alison Penny, Chris Tomes and Amanda Hough.

The Chairman informed that an urgent and confidential item had been added to the meeting agenda as a part II item.

### DECLARATIONS OF INTEREST

There were no declarations of interest received.

### MINUTES

The minutes of the meeting held on 5<sup>th</sup> July 2016 were approved as true and correct record subject to 'in October 2014' being added to page 7 for the Growth Fund discussion and Heidi Swidenbank replacing Heidi Swindenbank on page 9.

The Chairman informed that at the last meeting communication of decisions made by the Forum had been raised as an issue and requested that Forum members inform schools in their sector of decisions made as well as the LEA.

### RBWM CONSULTATION ON HIGH NEEDS FUNDING

The Forum considered the report that proposed that the schools forum agreed to a period of consultation, leading to a revised process for allocating High Needs Funding to support Children and Young People eligible for an education, health and care (EHC) plan or statement of special educational needs.

Debbie Verity and Geoff King attended the meeting to present the report to the Forum.

The Forum were informed that process only applied to high needs pupils in mainstream schools or colleges and did not apply to high needs pupils in resource provision / units or special schools.

The Forum were informed that 1.4 of the report showed comparative spend on high needs block with other authorities, however as this was misleading additional information was circulated that showed the percentage of spend per SEN pupil. This additional information showed that RBWMs spend was comparatively high when looking at the percentage of DSG

spent. It was questioned why RBWM spend had not increased as much as other authorities and the Forum were informed that RBWM was still spending more when compared with our statistical neighbours.

It is proposed that, once evidence had been received that a pupil met the criteria for statutory assessment, a funding matrix would be used to assess the level of High Needs top-up funding that will be made available. The matrix would consist of the main categories of need as identified in the Code of Practice 2014 and in use by other authorities. The proposed matrix shown to the Forum was a starting point and could be changed / reviewed as required. Figure 2 of the report showed the proposed example matrix that would be used when consulting on the methodology.

The Forum were informed that the level of funding would not be decreased by the proposed process it was about how the level of funding was distributed. It was noted that the consultation was about the system and not the funding.

In response to questions from the Chairman the Forum were informed that the consultation would take place over the autumn term with the results and proposals coming back to the Forum on December 2016 with implementation in April 2017.

The Chairman mentioned that the following issues may arise from the consultation:

- Who would populate the matrix.
- What level of expertise would those have forming the matrix.
- Moderation and scrutiny.
- Staff planning.
- Existing pupils; what process for transferring existing pupils to the matrix.

The Forum were informed that it was assumed that there would be a transitional period with the use of the matrix being for new assessments and used on existing statements when they were reviewed.

In response to questions the Forum were informed that the consultation would be with as many stakeholders as possible including parents; however the overriding say would be with the schools.

Anne Entwistle questioned what would happen with child transfers and mentioned that we needed to be mindful of the FE sector. She also mentioned that the report did not mention requests for increases in place funding to support the additional high needs students on roll at BCA and that the BCA currently had a funding gap. In response the Forum were informed that it was the responsibility of the local authority placing the pupil to pay the top-up and with regards to the BCA funding gap this would be reviewed via the annual place number funding and commissioning process.

It was questioned what the timetable was for consultation and concern was raised that it would be taking place during half term and thus give the impression that it was being hidden. The forum were informed that it would be going to all schools and colleges and certain parents during half term.

**Resolved unanimously: that the Schools Forum agrees to a period of consultation on proposals for a revised methodology to distribute High Needs top-up funding to mainstream schools**

## 2016-17 FINALISED DSG SETTLEMENT AND GUARANTEED 2017-18 DSG FUNDING.

The Forum were informed that the report being considered was split into two parts. The first summarised changes in RBWM's 2016-17 Dedicated Schools Grant (DSG) allocation as a result of the finalised settlement announced by the Education Funding Agency in July 2016; the impact on planned expenditure in 2016-17, and on the distribution of funding between the Early Years, Schools, and High Needs blocks.

The second part of the report summarised the changes to school funding arrangements for 2017-18 and RBWM's indicative 2017-18 DSG allocation.

The Forum were informed that there was an increase of £123k on the DSG settlement announced in December 2015, as reported to Schools Forum in March 2016. This increase was mainly due to an increase of 31 FTE three and four year olds compared with Jan 2015.

The Forum noted that the funding arrangements for 2017 to 2018 would remain broadly similar to last year, as the DfE had announced that implementation of the national funding formula would be put back to 2018-19. LAs' 2017-18 allocations for the schools block and high needs block would be based on adjusted baselines reflecting LAs' pattern of planned spend in 2016-17 rather than how government previously allocated funding.

On page 25 of the report table 4 showed the calculation of the 2016/17 adjusted baseline to be used for the indicative 2017-18 allocations, including the transfer of £315k Education Services Grant (ESG) retained duties funding in to the schools block DSG and the transfer of £492k of place funding from the EFA's post 16 budget into the high needs block for high needs places in further education (FE) colleges.

The Forum were informed that RBWM's schools block guaranteed unit of funding for 2017-18, £4,421.73 was £34 per pupil less than in 2016-17 due to the amount of schools block funding that had been transferred into the high needs baseline.

With regards to the education services grant general funding rate the Forum were informed that the grant would cease in September 2017 as planned. This grant is currently paid to LAs for its maintained pupils and separately to academies, at the rate of £77 per pupil.

As well as delegated and central schools block expenditure, schools block funding in 2017/18 would now include £315k previously paid to the Council as the retained duties element of the education services grant to support statutory services provided centrally on behalf of all schools. This was a transfer of funding from the LA to the Schools Block, not additional funding and the Forum were asked to approve the retention of £315k in the 2017-18 schools block central expenditure budget to continue to support the provision of the statutory services.

**Resolved Unanimously: that the Schools Forum approved the retention of £315k in 2017-18 for the statutory services set out in paragraph 5.9 previously funded by the retained duties element of the Education Services Grant.**

The Schools Forum were also asked to comment on and give an in principle agreement to:

- Leave the 2017-18 local school funding formula unchanged from 2016-17 in light of the turbulence expected in 2018-19 when the national funding formula would be implemented
- Use the 2017-18 basic per pupil entitlement rates across all key stages to balance the schools budget if pupil numbers turn out differently from the estimate.
- Retain maintained schools DSG funding in 2017-18 at the rate of £11 per pupil and to seek voluntary contributions from Academy schools at a similar level, to part fund school improvement / governor services currently funded by the Education Services Grant general funding grant that is ceasing in Sep 2017

The additional £11 per pupil contribution was being asked for as there had been a reduction in funding to the LEA but there had been no reduction in statutory duties.

(Alison Alexander joined the meeting)

Mike Wallace questioned what the impact would be if the Forum refused the request for £11 per pupil and was informed that if additional funding for the services could not be found then the continued delivery at current levels of services such as school improvement would need to be reviewed.

Nick Stevens mentioned that there was a perception that school improvement services were already under resourced and was informed that there were fewer directly employed officers in this area.

Clarification was sought regarding getting funding from academy schools and the forum were informed that they would be written to and asked to contribute. The LA currently provided improvement support to all schools; however if academies say no to this proposal then this offer would have to be reviewed.

Mike Wallace said he would like to get the views of academies on this proposal before the Forum make a decision as if they said no this would change the proposition.

Isabel Cooke and Heidi Sweindenbank both felt that academies would not support this proposition.

**Resolved unanimously: that the Schools Forum note the report.**

## DFE'S EARLY YEARS NATIONAL FUNDING FORMULA PROPOSALS

The Forum considered the information report regarding the DfE's proposals for an early years national funding formula and RBWM's illustrative 2017-18 early years DSG allocation. A further report would be brought back to the Forum in December 2016 regarding what early years funding would look like.

The Forum were reminded that from September 2017 working parents would be entitled to 30 hours of free childcare and that the rates paid to providers by LA had to be reviewed.

The EFA's intention is to increase funding rates at the local level to incentivise delivery of the additional hours for working parents. . This would mean that the average national hourly funding rate would increase from £4.56 to £4.88 for 3 and 4 year olds. RBWM's provisional funding rate, (the rate used to calculate RBWM's allocation of funding from the EFA), would be £5.00 per hour, an increase of £0.61 per hour from the current funding rate of £4.39.

The Forum were informed that the proposed increase in RBWM's funding rate for 3 and 4 year olds resulted in a provision 2017-18 allocation of £7.647m, for the free entitlement, an increase of £0.927m on the 2016-17 baseline. In addition, a provisional amount of £1.2m would be allocated for the additional hours for working parents covering the period September 2017 to March 2018. . Table 2 of the report gave a summary of the changes in funding.

With regards to disabled or SEN children the Forum were informed that there would be a ringfenced Targeted Early Years Disability Access Funding to support access for disabled and SEN children. This would be paid to all providers for each child in receipt of Disability Living Allowance taking up a place in their setting. In addition, LAs would be required to earmark an early years inclusion fund enabling providers to access funding for SEND children more easily.

(Cllr Kellaway left the meeting)

**Resolved unanimously: that the Forum note the update and that a working group be established.**

LOCAL GOVERNMENT ACT 1972 - EXCLUSION OF THE PUBLIC

**RESOLVED UNANIMOUSLY: That under Section 100(A)(4) of the Local Government Act 1972, the public be excluded from the remainder of the meeting whilst discussion takes place on the grounds that they involve the likely disclosure of exempt information as defined in Paragraphs 1-7 of part I of Schedule 12A of the Act.**

The meeting, which began at 2.30 pm, finished at 5.05 pm

CHAIRMAN.....

DATE.....

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## ROYAL BOROUGH OF WINDSOR & MAIDENHEAD SCHOOLS FORUM

|                      |   |  |
|----------------------|---|--|
| Date:                | 31st Jan 2017   | AGENDA ITEM: 1   |
| Title:               | <b>DSG 2017-18 Settlement and Strategy for Managing DSG in Future Years</b> |  |
| Responsible officer: | Kevin McDaniel, Head of Education and Schools                               |  |
| Contact officer:     | Phil Herd<br>Temporary Lead Accountant                                      | Tel: 01628 794632<br>E-mail <a href="mailto:Phil.herd@rbwm.gov.uk">Phil.herd@rbwm.gov.uk</a> |

### 1 SUMMARY

- 1.1 This paper summarises RBWM's 2017-18 DSG allocation and sets out proposals for managing the DSG for the next two years.

### 2 RECOMMENDATIONS

#### Schools Forum is asked to note

- 2.1 The final 2017-18 funding settlement as summarised in the tables shown in 3
- 2.2 Monitoring the DSG strategy will be a standing item for future forum meetings.

#### Schools Forum is asked to endorse

- i) The overall DSG strategy described in section 4
- i) The required high needs block savings in principle. To support the idea that a working group be formed to set out detailed measures by which the required savings can be made.

#### Schools Forum is asked to approve:-

- i) The retention of headroom to support the high needs block
- ii) A reduction in AWPU of 0.5% to support high needs pressures. It is intended that this is initially paid into a specific DSG reserve and only called upon if required and with forum approval.
- iii) The increased early year's retention to support high needs.
- iv) The carry forward of the DSG Deficit

### 3 DSG FUNDING FOR 2017-18

- 3.1 The arrangements for the 17-18 DSG allocation were covered in detail at Octobers Forum. The DFE made the final announcement on 20<sup>th</sup> December 2016 and the DSG for 17-18 is now £109.776. The main un expected difference is an additional allocation of £390k into the high needs block. The DFE distributed an additional £35m nationally on the basis of population growth, into the high needs block.

|                              | Pupil   | Funding rate | Allocation |
|------------------------------|---------|--------------|------------|
|                              | Numbers | £            | £m         |
| Schools Block                | 18,816  | 4,421.73     | 83.200     |
| High Needs Block             |         |              | 16.909     |
| Early Years Block – 3&4 y.o. | 1.610   | 4,750.00     | 7.647      |
| - 2 yo & other               |         |              | 2.020      |
| Total DSG 2017-18            |         |              | 109.776    |

- 3.2 The DSG will change during the year as a result of changes to the early years census and the implications will be reported to future schools forum meetings . The movements in the DSG from 2016-17 to 2017-18 and the associated budgetary pressures are shown below.

|                    | Schools Block | Early Years | High Needs | Total   |
|--------------------|---------------|-------------|------------|---------|
|                    | £m            | £m          | £m         | £m      |
| 2016-17            | 82.258        | 7.379       | 15.327     | 104.964 |
| Impact of rebase   | -1.119        | -0.065      | 1.184      |         |
| Sub Total          | 81.139        | 7.314       | 16.511     | 104.964 |
| 2017-18 Allocation | 83.200        | 9.667       | 16.909     | 109.776 |
| Increase           | 2.061         | 2.353       | 0.398      | 4.812   |



3.3 The DSG Budgetary requirements, matched against the grant increases are summarised as follows:-

|                              | Increase in Grant<br>£m | Pressures<br>£m | Contribution to Pressures<br>£m |
|------------------------------|-------------------------|-----------------|---------------------------------|
| Schools Block                | 2,061                   |                 |                                 |
| Increase School Budgets      |                         | 1,049           |                                 |
| ESG Retained Duties          |                         | 315             |                                 |
| Increase in Growth Fund      |                         | 150             |                                 |
| Sub Total Schools            | 2,061                   | 1,514           | 547                             |
| Early Years Block            | 2,353                   |                 |                                 |
| Increase in 3&4 yo EYNFF     |                         | 1,578           |                                 |
| Increase 2 yo Funding        |                         | 36              |                                 |
| Nursery School Protection    |                         | 210             |                                 |
| SEN Inclusion Fund           |                         | 160             |                                 |
| EYPP Investment Programme    |                         | 40              |                                 |
| Disability Access Fund       |                         | 20              |                                 |
| Sub Total Early Years        | 2,353                   | 2,044           | 309                             |
| High Needs Block             | 398                     |                 |                                 |
| 2016-17 Continuing Pressures |                         | 1,250           |                                 |
| 2017-18 New Pressures        |                         | 800             |                                 |
| 2017-18 Savings              |                         | -900            |                                 |
| Sub Total High Needs Block   | 398                     | 1,150           | -752                            |
| Other Budget Changes         |                         |                 |                                 |
| Saving SEN Consortium        |                         | -75             |                                 |
| Minor Changes                |                         | -21             |                                 |
| Sub Total Budget Changes     |                         | -96             | 96                              |
| Grand Total                  | 4,812                   | 4,612           | 200                             |

3.4 The table in 3.4 illustrates that there is potentially £547k available headroom within the schools block, opposed to the £300k, suggested on 13<sup>th</sup> December 2016. This is because the numbers of pupil attracting prior attainment funding have fallen, which could not have been anticipated. In addition to this the high needs block has increased by £398k, which is due mainly to an additional allocation based upon population growth. This is now included in the base allocation for high needs, but a new formula allocation is to be introduced from April 2018.

3.5 The above movements are favourable and do release some pressure on the DSG. However the DFE have now released draft proposals for the re-distribution of high needs funding. The indicative figures show that RBWM could lose £2.3m if this formula were implemented in full. This is not yet built into the strategy because the proposals have to be finalised. It is

something that will have to be included in the future and may result in the high needs block savings having to increase.

#### 4. DSG STRATEGY FOR MANAGING BUDGETARY PRESSURES

4.1 There are a number of significant requirements within the High Needs Block of the DSG which mean that the overall DSG will go into deficit as at March 2017. A working group of forum members were consulted on 13<sup>th</sup> Dec about the possible options that could be implemented in order to balance the DSG over the next 2 or 3 financial years.

4.2 If all the DSG grant increases were passported to the relevant sectors, the impact these requirements would have on the DSG can be summarised below:-

|                             | 2016-17 | 2017-18 | 2018-19 |
|-----------------------------|---------|---------|---------|
|                             | £m      | £m      | £m      |
| DSG Deficit                 |         | 0.950   | 3.000   |
| High Needs Overspend        | 1.250   | 1.250   | 1.250   |
| One Off Savings             | -0.300  |         |         |
| Continuing HNB Requirements |         | 0.800   | 1.600   |
| Deficit c/f                 | 0.950   | 3.000   | 5.850   |

4.5 These requirements must be managed by taking savings within early years, schools and or high needs blocks. The implications, opportunities and risks associated with such savings are described in the attached annexes relating to each block.

4.6 The issues and some possible solutions were discussed at length with a working group of forum members on 13<sup>th</sup> December 2016. The general consensus was that high needs budgets have to be more tightly managed which means pupils only being placed in specialist provision when absolutely necessary. Members therefore requested an analysis of the most expensive HNB spend to discuss alternatives both now and in the future. A breakdown of expenditure compared to budget is given in the high needs annexe.

4.7 RBWM is proposing a 2 year deficit reduction programme in light of prospective NFF changes and the availability of additional headroom going into 2017/18. 3 Years is an option however if the Government does continue to allow local flexibility between blocks as set out in the NFF consultation.

4.8 Potential options to manage the pressures within each block are explained in detail in the attached annexes :-

Annexe 1 High Needs Block

Annexe 2 Schools Block

Annexe 3 Early Years Block

4.9 The high needs block will be subject to challenging savings targets over the next 2 years, but this will not be sufficient alone to bring the DSG into balance by 31<sup>st</sup> March 2019. The strategy for managing the DSG is therefore proposed as follows:-

- i) Making savings in the high needs block totalling £1.8m which will focus on keeping more young people in local mainstream provision

- ii) Use of School Block Headroom
- iii) AWPU reduction of 0.5% to fund a DSG reserve.
- iv) Use of Early Years retention monies.

4.11 The availability of additional headroom changes this and a possible revised strategy could be summarised as follows:-

|                               | 2016-17 | 2017-18 | 2018-19 |
|-------------------------------|---------|---------|---------|
|                               | £k      | £k      | £k      |
| Deficit b/f                   |         | 950     | 616     |
| HNB Overspend                 | 1,250   |         |         |
| One Off Savings               | -300    |         |         |
| HNB 16-17 Requirements        |         | 1,250   | 1,250   |
| HNB 17-18 Requirements        |         | 800     | 800     |
| HNB 18-19 Requirements        |         |         | 800     |
| HNB Additional Allocation     |         | -398    | -398    |
| HNB Target Savings 17-18      |         | -900    | -900    |
| HNB Target Savings 18-19      |         |         | -900    |
| HNB Sub Total                 | 950     | 752     | 652     |
| Reduction in AWPU             |         | -230    | -230    |
| Schools Block Headroom        |         | -300    | -300    |
| Additional Headroom           |         | -247    | -247    |
| Schools Block Sub Total       | 0       | -777    | -777    |
| Early Years Central Retention |         | -309    | -309    |
| EY Central Retention 18 19    |         |         | -182    |
| Deficit c/f                   | 950     | 616     | 0       |

4..12 The impact on each block is described in the relevant annexes. The main differences are that high needs block savings are reduced to recognise that future funding maybe reduced as a result of the DFE national formula. It should be possible to clear the deficit by 31<sup>st</sup> March 2019,

4.13 The main risk to the strategy is the success of the savings programme within the high needs block. The suggested savings on high needs are high level at this point and these need to be firmed up at the next forum meeting. Forum are asked to endorse that a working group is established in order to implement this.

4.14 It is important that this strategy is monitored on a regular basis and that members are regularly informed of progress. It is therefore suggested that monitoring the DSG strategy is a standing item for each future forum meeting.

## ANNEX 1

### HIGH NEEDS BLOCK ANNEX

The pressures within the High Needs Block arise from increasing numbers of pupils requiring EHCP's. This is as a result of the Children and Families Act 2014 and the increasing numbers requiring support post 16.

| NCY          | Age | Sept 2015  | Sept 2016  | Teacher Group Change | Cohort Change |
|--------------|-----|------------|------------|----------------------|---------------|
| 18           | 23  | 0          | 3          | 3                    | 1             |
| 17           | 22  | 2          | 3          | 1                    | 1             |
| 16           | 21  | 2          | 10         | 8                    | 1             |
| 15           | 20  | 9          | 19         | 10                   | 1             |
| 14           | 19  | 18         | 38         | 20                   | 1             |
| 13           | 18  | 37         | 62         | 25                   | 3             |
| 12           | 17  | 59         | 77         | 18                   | 4             |
| 11           | 16  | 73         | 83         | 10                   | 3             |
| 10           | 15  | 80         | 71         | -9                   | 7             |
| 9            | 14  | 64         | 61         | -3                   | 6             |
| 8            | 13  | 55         | 58         | 3                    | 2             |
| 7            | 12  | 56         | 65         | 9                    | 8             |
| 6            | 11  | 57         | 60         | 3                    | 9             |
| 5            | 10  | 51         | 42         | -9                   | 6             |
| 4            | 9   | 36         | 56         | 20                   | 4             |
| 3            | 8   | 52         | 36         | -16                  | 9             |
| 2            | 7   | 27         | 43         | 16                   | 9             |
| 1            | 6   | 34         | 34         | 0                    | 14            |
| 0            | 5   | 20         | 13         | -7                   | 11            |
| -1           | 4   | 2          | 4          | 2                    | 4             |
| -2           | 3   | 0          | 1          | 1                    | 1             |
| <b>Total</b> |     | <b>734</b> | <b>839</b> | <b>105</b>           | <b>105</b>    |

The table shows that numbers are increasing within every year group.

A summary of the high needs budgets are shown as follows:-

| SEN Group                      | 2015-16       | 2016-17       | 2016-17       | 2016-17      |
|--------------------------------|---------------|---------------|---------------|--------------|
|                                | Outturn       | Budget        | Projection    | Overspend    |
|                                | £k            | £k            | £k            | £k           |
| Mainstream Schools Top Ups     | 1,897         | 1,823         | 1,420         | (403)        |
| Special Schools and RP Places  | 2,771         | 2,771         | 2,771         | 0            |
| Special Schools and RP Top Ups | 3,396         | 3,577         | 3,459         | (118)        |
| Forest Bridge Top Ups          | 0             | 392           | 593           | 202          |
| Ind and NMSS Schools Top Ups   | 5,663         | 5,044         | 6,326         | 1,282        |
| SEN Support Services           | 1,050         | 1,033         | 1,195         | 162          |
| Alternative Provision          | 2,111         | 2,147         | 2,273         | 126          |
| <b>Totals</b>                  | <b>16,888</b> | <b>16,787</b> | <b>18,037</b> | <b>1,250</b> |

## ANNEX 1

The table below illustrates how a strategy maybe implemented. The columns show the SEN services where the savings will be introduced, which align to the previous table. The rows are a description of the individual plans that will be introduced in order to ensure the savings occur.

A reduction in top ups would involve applying a percentage reduction to all top ups in relation to RBWM schools, including the special school. The new matrix model will be applied as normal but the agreed % cut would be deducted for all payments.

The High Needs Funding Review relates to the recent review which is a later agenda item. This review proposed an equitable methodology for deciding on the appropriate level of top up funding for individuals who meet the criteria for additional high needs funding. Although not implemented for the purpose of reducing costs, it will provide a clear process for triggering additional funding leading to greater consistency across all schools. This stand should be considered in hand with the proposed universal % reduction in top up payments.

Alternative provision is a mix of statutory provision (PRU) for permanently excluded and vulnerable medical; hard to place; and those pupils at risk of missing education. It is proposed to clearly delineate PRU costs for and to establish a clear process for other access to AP funds in line with the strategy to retain young people in local mainstream provision via the early help hub services.

Each SEN service will be asked to take part in a review of the service impact of savings before Easter and to bring final proposals to be implemented for the new academic year.

Improved commissioning would involve implementing a specific project to review all specialist payments. Using an invest to save methodology, each placement would be formally reviewed over time, specifically looking at costs, value for money and appropriateness. Note – this is in addition to the normal individual annual review of each EHCP.

The DFE have announced that each Local Authority should implement and publish a strategy for their high needs provision. To enable this to happen the DFE are distributing £23m nationally and RBWM's share of this is £66k.

# ANNEX 1

## Implementing These Proposals

Funding Forum are asked to approve or make amendments to the matrix below. Any amendments must total £1.8m by the end of March 2019.

| Year                            | Mainstream School Top Ups | Special School and RP Top Ups | Forest Bridge Top Ups | Indep and NMSS Schools | Sen Support Services | Alternative Provision | Totals      |
|---------------------------------|---------------------------|-------------------------------|-----------------------|------------------------|----------------------|-----------------------|-------------|
| 2017-18                         | £k                        | £k                            | £k                    | £k                     | £k                   | £k                    | £k          |
| Reduction in Top Ups            | 50                        | 50                            |                       |                        |                      |                       | 100         |
| Consultation Review             | 30                        | 20                            | 20                    |                        |                      |                       | 70          |
| Reorganisation of Alt Provision |                           |                               |                       |                        |                      | 100                   | 100         |
| SEN Support Services            |                           |                               |                       |                        | 100                  |                       | 100         |
| Improved Commissioning          |                           | 40                            | 50                    | 440                    |                      |                       | 530         |
| <b>Total 2017-18</b>            | <b>80</b>                 | <b>110</b>                    | <b>70</b>             | <b>440</b>             | <b>100</b>           | <b>100</b>            | <b>900</b>  |
| Year                            |                           |                               |                       |                        |                      |                       |             |
| 2018-19                         |                           |                               |                       |                        |                      |                       |             |
| Reduction in Top Ups            | 50                        | 50                            |                       |                        |                      |                       | 100         |
| Consultation Review             | 20                        | 20                            | 30                    |                        |                      |                       | 70          |
| Reorganisation of Alt Provision |                           |                               |                       |                        |                      | 140                   | 140         |
| SEN Support Services            |                           |                               |                       |                        | 60                   |                       | 60          |
| Improved Commissioning          |                           |                               | 30                    | 500                    |                      |                       | 530         |
| <b>Total 2018-19</b>            | <b>70</b>                 | <b>70</b>                     | <b>60</b>             | <b>500</b>             | <b>60</b>            | <b>140</b>            | <b>900</b>  |
| Totals                          |                           |                               |                       |                        |                      |                       |             |
| Reduction in Top Ups            | 100                       | 100                           | 0                     | 0                      | 0                    | 0                     | 200         |
| Consultation Review             | 50                        | 40                            | 50                    | 0                      | 0                    | 0                     | 140         |
| Reorganisation of Alt Provision | 0                         | 0                             | 0                     | 0                      | 0                    | 240                   | 240         |
| SEN Support Services            | 0                         | 0                             | 0                     | 0                      | 160                  | 0                     | 160         |
| Improved Commissioning          | 0                         | 40                            | 80                    | 940                    | 0                    | 0                     | 1060        |
| <b>Totals</b>                   | <b>150</b>                | <b>180</b>                    | <b>130</b>            | <b>940</b>             | <b>160</b>           | <b>240</b>            | <b>1800</b> |

## ANNEX 2

### SCHOOLS BLOCK ANNEXE

There were 3 options suggested at the working group on 13<sup>th</sup> December as to how savings could be made within the schools block to help fund high needs pressures.

- i) Withholding headroom
- ii) 0.5% AWPU reduction
- iii) 1% AWPU reduction .

It was stated that these savings would be one off for 2017-18 because the schools block would be ring-fenced from April 2018 onwards. Since the meeting, the DFE have relaxed the rules around the ring-fencing of the blocks and the consultation states:-

- a. As announced in July 2016, there will be no ring-fence on the schools block in 2017-18. Local authorities are able to transfer funding between their schools and high needs budgets. We will monitor this carefully and in March 2017 will collect more information to establish new planned spending baselines on schools and high needs, as explained in paragraph 3.8.
- b. In 2018-19 and subsequent years there will be no restrictions on the transfer of funding between the high needs funding block, the central schools services block and the elements of early years funding that local authorities are allowed to retain for central spending. It will also remain possible for local authorities to transfer funds into their high needs budgets from sources other than their DSG allocation.
- c. Furthermore, in 2018-19 we propose to provide an opportunity for local authorities to transfer funds, from the funding that schools are due to receive through the schools formula, to their high needs budget. To exercise this flexibility, local authorities would have to get the agreement of their schools forum and a majority of primary and/or secondary schools and academies (with transfers confined to the primary and secondary elements of the schools block as agreed by phase). We will review the degree of movement in 2017-18 through a second baseline exercise and, in the light of that, consider whether there should be a limit on transfers in 2018-19, amounting to no more than, say, 2% or 3% of the high needs block allocation. In any case local authorities would continue to be obliged to meet the minimum funding guarantee for mainstream schools.”

This is quoted for information purposes only. The intention is for RBWM to work as closely as possible with schools and agencies to manage the high needs budget from within existing resources.

#### Withholding Headroom

Pupil numbers have increased in 2017-18 and the DSG funding rate received is higher than that paid out to schools. This results in there being headroom of approximately £300k which should be added to the schools budget.

In addition to this the total of the schools budget is approximately £400k less than anticipated due mainly to lower prior attainment numbers. £150k of this £400k saving will fund the required increase in the growth fund.

This means that the amount available for headroom is £547k rather than £300k suggested in December. Given the information above it is also assumed this is ongoing rather than one-off. However proposals are not intended to be taken individually it is the strategy as a whole. If the HNB savings are delivered successfully then more money can be delivered into the schools block.

Reduction in AWPU of 0.5%

The possibility of reducing schools budgets in order to fund high needs pressures, was discussed at the December meeting. Whilst headroom and the high needs allocation have both increased, this remains a proposal due to the possibility of future high needs allocations decreasing. It is intended that the money saved will be invested into a DSG reserve and released when/if required and by reference to a future forum meeting.

The problem with AWPU reductions, is that it does not impact on schools equally because of the MFG calculations.

The impact that a 0.5% reduction will have now is shown below:-



| URN    | School Name                               | Pupil<br>Nos | 2017-2018<br>£ | 0.5% Red<br>£ | Difference<br>£ |
|--------|---|--------------|----------------|---------------|-----------------|
| 109818 | Alwyn Infant School                       | 302          | 1,145,560      | 1,141,332     | -4,228          |
| 109819 | Courthouse Junior School                  | 406          | 1,477,779      | 1,476,894     | -885            |
| 109820 | Riverside Primary School and Nursery      | 235          | 1,051,958      | 1,051,958     | 0               |
| 109821 | Wessex Primary School                     | 405          | 1,507,768      | 1,502,098     | -5,670          |
| 109827 | Kings Court First School                  | 217          | 803,230        | 800,192       | -3,038          |
| 109832 | Waltham St. Lawrence CP School            | 101          | 447,970        | 447,413       | -557            |
| 109833 | Hilltop First School                      | 218          | 885,831        | 885,831       | 0               |
| 109841 | Woodlands Park Primary School             | 155          | 700,684        | 699,979       | -705            |
| 109842 | Furze Platt Junior School                 | 364          | 1,283,196      | 1,273,475     | -9,722          |
| 109843 | South Ascot Village School                | 211          | 831,024        | 828,392       | -2,632          |
| 109846 | Furze Platt Infant School                 | 268          | 1,020,461      | 1,019,564     | -897            |
| 109856 | Cookham Rise Primary School               | 210          | 832,905        | 829,965       | -2,940          |
| 109873 | Homer First School & Nursery              | 219          | 885,906        | 883,477       | -2,428          |
| 109884 | Alexander First School                    | 106          | 527,384        | 527,384       | 0               |
| 109888 | Oldfield Primary School                   | 366          | 1,358,131      | 1,352,053     | -6,078          |
| 109897 | Oakfield First School                     | 287          | 1,095,697      | 1,093,968     | -1,729          |
| 109907 | Wraysbury Primary School                  | 390          | 1,463,539      | 1,459,681     | -3,858          |
| 109938 | Larchfield Primary School                 | 201          | 858,132        | 855,762       | -2,370          |
| 109951 | Bisham C of E Primary                     | 45           | 273,846        | 272,602       | -1,244          |
| 109952 | Braywood CE First School                  | 147          | 586,470        | 586,470       | 0               |
| 109960 | Cookham Dean CE Aided Primary             | 186          | 694,787        | 692,264       | -2,523          |
| 109961 | Holy Trinity CE Primary School            | 211          | 781,940        | 778,986       | -2,954          |
| 109969 | Boyne Hill CE Infant School               | 180          | 756,177        | 756,177       | 0               |
| 109991 | All Saints C.of E. Controlled             | 315          | 1,232,485      | 1,228,075     | -4,410          |
| 109996 | Eton Wick C.E. First School               | 140          | 599,175        | 598,419       | -756            |
| 109997 | The Queen Anne RF CE First                | 147          | 614,112        | 613,605       | -507            |
| 110014 | The Royal School                          | 96           | 440,493        | 440,493       | 0               |
| 110018 | Holy Trinity CE Primary School            | 229          | 845,997        | 845,997       | 0               |
| 110019 | St Michael's CE Primary School            | 210          | 781,470        | 778,530       | -2,940          |
| 110020 | Cheapside CE Primary School               | 109          | 455,093        | 453,567       | -1,526          |
| 110022 | Clewer Green CE Aided First School        | 292          | 1,088,979      | 1,085,146     | -3,833          |
| 110023 | Trinity St Stephen CE First               | 145          | 602,619        | 600,589       | -2,030          |
| 110030 | St Edmund Champion Catholic Primary       | 419          | 1,455,015      | 1,449,149     | -5,866          |
| 110031 | St Edward's Catholic First School         | 284          | 1,034,336      | 1,030,113     | -4,223          |
| 110086 | St. Edward's Royal Free Ecumenical Middle | 479          | 1,930,264      | 1,928,293     | -1,971          |
| 133580 | Churchmead CofE (VA) School               | 370          | 2,151,128      | 2,148,655     | -2,473          |
| 140494 | Braywick Court                            | 107          | 462,122        | 462,122       | 0               |
| 142576 | Eton Porny C of E First School            | 130          | 566,213        | 563,831       | -2,382          |
| 142790 | Dedworth Green First School               | 161          | 713,097        | 713,097       | 0               |
| 136712 | Lowbrook Academy                          | 331          | 1,131,282      | 1,126,648     | -4,634          |

| URN    | School Name                     | Pupil<br>Nos  | 2017-2018<br>£    | 0.5% Red<br>£     | Difference<br>£ |
|--------|---------------------------------|---------------|-------------------|-------------------|-----------------|
| 142846 | Holyport CE Primary School      | 365           | 1,286,768         | 1,281,658         | -5,110          |
| 141602 | Burchetts Green CE Infant Scho  | 57            | 344,831           | 344,831           | 0               |
| 141295 | Knowl Hill Church of England P  | 117           | 570,890           | 570,890           | 0               |
| 141601 | St Luke's CE Primary School     | 271           | 1,138,553         | 1,138,553         | 0               |
| 138635 | White Waltham CofE Academy      | 206           | 755,909           | 753,636           | -2,273          |
| 139882 | St Mary's Catholic Primary Scho | 308           | 1,146,527         | 1,145,491         | -1,036          |
| 141818 | St. Francis Catholic Primary    | 210           | 762,016           | 759,160           | -2,857          |
| 137788 | Datchet St. Mary's School       | 227           | 922,244           | 919,066           | -3,178          |
| 141349 | St Peter's Church of England Sc | 224           | 984,980           | 984,980           | 0               |
| 142791 | Dedworth Middle School          | 463           | 2,016,170         | 2,012,932         | -3,238          |
| 138879 | Desborough College              | 605           | 2,971,572         | 2,971,572         | 0               |
| 139971 | Holyport College                | 353           | 1,787,249         | 1,782,631         | -4,618          |
| 138823 | Chartres School                 | 1,216         | 5,610,428         | 5,584,662         | -25,766         |
| 142357 | Newlands Girls School           | 945           | 4,409,612         | 4,389,605         | -20,007         |
| 141844 | The Windsor Boys' School        | 585           | 3,075,289         | 3,063,442         | -11,847         |
| 141852 | Windsor Girls' School           | 505           | 2,625,769         | 2,618,347         | -7,422          |
| 137740 | Furze Platt Senior School       | 980           | 4,728,535         | 4,707,804         | -20,731         |
| 137695 | Cox Green School                | 823           | 3,914,105         | 3,896,757         | -17,348         |
| 138342 | Altwood CE School               | 460           | 2,363,949         | 2,361,071         | -2,878          |
| 110075 | Trevelyan Middle                | 506           | 2,095,696         | 2,087,274         | -8,422          |
|        | <b>Totals</b>                   | <b>18,820</b> | <b>80,885,347</b> | <b>80,656,608</b> | <b>-228,740</b> |

### 2018-19 Onwards

This will only release £229k in 2017-18 because of the impact of MFG. This will mean a further £71k will be required in 2018-19. This could probably be found from additional headroom, or other measures rather than a continuation of an AWPU reduction.

This strategy needs to be linked to the DFE final proposals for future funding arrangements which will be implemented from April 2018.

It is the intention to maximise the schools block as much as possible but the high needs pressures have to be managed. It is therefore important that the strategy is closely monitored and reported to members.

The details of the Early Years National Funding Formula (EYNFF) are covered in more detail under agenda item 2.

The Early Years Block is increasing by 13.9% in real terms. The DFE have stipulated that 93% of funding must be passed onto providers. (95% in 2018-19) RBWM currently holds 2% of funding for central items.

It is therefore proposed that 7% is held centrally and this would mean that £300k could be used to fund early years SEN services, that are currently paid for by the high needs block.

The 93% and 95% pass through includes provision for an SEN inclusion fund. It is intended that the SEN inclusion fund is funded from the central provision rather than by top slicing the rates paid to providers. RBWM is therefore not holding back the maximum amounts. A summary is shown in the table below:-

|  | Amount |
|--|--------|
|  | £k     |
| EYNFF Mainstream Funding               | 8,861  |
| Transitional Funding Nursery Schools   | 210    |
| Total Funding (a)                      | 9,071  |
|  |        |
| Passed onto providers (93%) of £8.861m | 8,241  |
| Transitional Funding Nursery Schools   | 210    |
| Total Funding Passed to Providers (b)  | 8,451  |
|  |        |
| Central Funding (a) – (b)              | 620    |
|  |        |

The central retention will allow for current central spend to be funded, SEN inclusion fund of £150k and fund early years SEN services that are currently funded by the high needs block. The retention monies will also include £40k additional funds to enhance the EYPP allocations for the next 3 years.

The allowable retention for 2018-19 will be 95% and therefore only £250k can be used to assist with high needs pressures. As with the schools block, it will be possible to delegate more funding if the high needs pressures are managed.

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## ROYAL BOROUGH OF WINDSOR & MAIDENHEAD SCHOOLS FORUM

|                      |   |   |
|----------------------|---|---|
| Date:                | <b>31st Jan 2017</b>  | <b>AGENDA ITEM: 3</b>                             |
| Title:               | <b>2017-18 Schools Budget and Centrally Retained Budget Proposals</b> |   |
| Responsible officer: | Kevin McDaniel, Head of Education and Schools                         |   |
| Contact officer:     | Phil Herd<br>Temporary Lead Accountant                                | Tel: 01628 794632<br>E-mail Phil.Herd@RBWM.gov.uk |

### 1 SUMMARY

- 1.1 This paper summarises RBWM's proposed schools budget allocation and the schools block central budgets.

### 2 RECOMMENDATIONS

#### Schools Forum is asked to approve:

- 2.1 The final 2017-18 funding formula as set out in Annexe 3 to this report and the indicative individual school budget shares set out in annexe 4.
- 2.2 That maintained school members (head teachers and governors) of the Schools Forum vote separately by sector, and individually for each service, whether each of the services in the tables within 3.7 should be provided centrally, and to approve the de-delegation rates shown. The vote will be binding on all maintained schools in the relevant sector.
- 2.3 Forum members are asked to approve the central budgets as described in section 4.

### 3 DELEGATED SCHOOL BUDGETS FOR PUPILS AGED 4-16

- 3.1 The EFA have issued the October 2016 datasets which have been used to populate the 2017-18 school funding formula. As confirmed at the Schools Forum meeting in October 2016, RBWM's 2017-18 formula is unchanged from last year. The overall funding allocated through the final formula, the funding rates, and the pupil units are shown in Annex 3 with equivalent 2016-17 information for comparison. Individual school budget shares are shown in Annexe 4.
- 3.2 These proposals exclude the 0.5% reduction on AWPU. The decision on this, needs to be taken later in the agenda.
- 3.3 Funding allocated through the formula (including academies) has increased by £1.05m from £79.836m in 2016-17 to £80.885m in 2017-18. This is mainly due to a net increase of 375 pupils on roll. The numbers of pupils attracting low prior attainment funding have fallen meaning that the allocation via these factors have fallen from £5.232m to £5.136m The Minimum Funding Guarantee (MFG) has reduced slightly from £309k to £303k. This may appear insignificant, but if all things had remained the same, the MFG would have reduced by approximately £125k. The reason this has not happened, is as a result of the fall in prior attainment funding. The schools that are gaining, have had those gains capped at 15%.

3.4 Other than the changes mentioned in 3.3 the formula for 2017-18 is similar to 2016-17 has demonstrated in the table below:-

|                                   | <b>2017-18</b> | <b>2016-17</b> |
|-----------------------------------|----------------|----------------|
| Distributed via Basic Entitlement | 79.18%         | 78.72%         |
| Pupil Led Factors                 | 89.94%         | 89.82%         |
| Primary : Secondary Ratio         | 1:1.27         | 1:1.26         |

3.5 In addition to funding allocated through the formula, schools and academies will continue to receive other funding:

- Early years funding
- Post 16 funding
- High needs funding –place funding for resource units, and top-up for all high needs pupils
- Pupil premium
- PE and sports grant
- Universal infant free meals funding
- Capital grant.

### **De-Delegation**

3.6 ‘De-delegation’ is the mechanism by which maintained schools pool some of their delegated budget in order to benefit from specific services that could be provided centrally in a more efficient and targeted way and at less risk to individual schools. As in previous, any decisions made to de-delegate funding in 2016 to 2017 relate to that year only, so new decisions are required for 2017-18 to ‘de-delegate’ funding for those services prescribed by the EFA. Schools forum members for primary maintained schools and secondary maintained schools must decide separately for each phase whether the service should be provided centrally. The decision is binding on all maintained mainstream schools in that phase.

3.7 The individual school budget allocations shown at annexe 4 are before any top slice for de-delegation. Annexe 5 shows the amounts each maintained school will have deducted from their budget share based on the de-delegation rates set out in the table below. If approved, funding will be removed from schools’ delegated budgets before school budgets are issued. Annexe 2 gives more information on the services provided centrally.

| <b>Primary De-delegated services 2017-18</b>  | <b>Method</b>   | <b>2017-18 Rate</b> | <b>2017-18 Total £000</b> | <b>2016-17 Rate</b> | <b>2016-17 Total £000</b> |
|---|-----------------|---------------------|---------------------------|---------------------|---------------------------|
| Contingencies including schools in financial difficulties and deficits of closing schools                               | Per pupil       | <b>£15</b>          | <b>£121</b>               | £15                 | £135k                     |
| Behaviour support services  | Per IDACI pupil | <b>£50</b>          | <b>£53</b>                | £50                 | £63k                      |
| Licences/subscriptions  | Per pupil       | <b>Not offered</b>  |                           | £1                  | £15k                      |
|   | Per school      |                     |                           | £150                |                           |
| Staff costs supply cover (e.g. maternity, long term sick, trade union and public duties, suspended staff reimbursement) | Per pupil       | <b>£25</b>          | <b>£201</b>               | £25                 | £225k                     |

| <b>Secondary De-delegated services 2017-18</b>  | <b>Method</b>   | <b>2017-18 Rate</b> | <b>2017-18 Total £000</b> | <b>2016-17 Rate</b>         | <b>2016-17 Total £000</b> |
|---|-----------------|---------------------|---------------------------|-----------------------------|---------------------------|
| Contingencies including schools in financial difficulties and deficits of closing schools                               | Per pupil       | n/a                 | n/a                       | Secondaries did not approve |                           |
| Behaviour support services  | Per IDACI pupil | n/a                 | n/a                       | Secondaries did not approve |                           |
| Licences/subscriptions  | Per pupil       | <b>Not Offered</b>  |                           | £1                          | £5k                       |
|   | Per school      |                     |                           | £150                        |                           |
| Staff costs supply cover (e.g. maternity, long term sick, trade union and public duties, suspended staff reimbursement) | Per pupil       | <b>£25</b>          | <b>£15</b>                | £25                         | £96k                      |

3.8 The main change for 2017-18 is that it will no longer be possible to de-delegate funding for licenses and subscriptions. Most of the licenses that schools need and use regularly are now covered by the DfE's central procurement arrangements<sup>1</sup> which allow schools to operate under these licenses without further cost to themselves. The licenses covered by this arrangement are:

- Copyright Licensing Agency, for print and digital copyright content in books, journals and magazines
- Schools Printed Music Licence, for printed music
- Newspaper Licensing Agency, for newspapers and magazines
- Educational Recording Agency, for recording and use of radio and television programmes
- Filmbank and Motion Picture Licensing Company, for showing of films
- Performing Right Society for Music, Phonographic Performance Ltd. and the Mechanical Copyright Protection Society, for playing and recording music
- Christian Copyright Licensing International, for hymns and other Christian music

3.9 For 2017-18, schools which need any of the few remaining licenses that are not on the DfE's central license list, including software licenses and the Fisher Family Trust subscription, will have to purchase them from their own delegated budgets.

3.10 Schools forum members for primary maintained schools and secondary maintained schools are asked to vote separately for each phase on the de-delegation arrangements as set out above.

#### **4 CENTRAL SCHOOLS EXPENDITURE**

4.1 RBWM plans to spend £1.283m on central services funded from the Schools Block in 2017-18, (see table within 4.2 below), an increase of £128k on 2016-17.

4.2 Under School Finance regulations, Schools block funding for specified services may only be centrally retained with the agreement of the Schools Forum, and provided that budgets are made available to academies and free schools on the same basis as maintained schools. The Table below sets out RBWM's proposals for planned central schools expenditure in 2017-18. This is where SF approval is required.

<sup>1</sup> This is where the DfE purchases licenses on behalf of all state funded primary and secondary schools and recharges the cost to LAs' central schools budget. See <https://www.gov.uk/copyright-licences-information-for-schools> for more information.

### Central schools expenditure 2017-18 requiring SF approval

| EFA limitations                                       | S251 line | Expenditure budget                     | 16-17<br>£000 | 17-18<br>£000 | Change<br>£000 |
|---|-----------|--|---------------|---------------|----------------|
| No SF approval required                               |           | Central licenses negotiated by the DfE | 98            | <b>98</b>     | -              |
| SF approval required, no increases or new commitments | 1.4.1     | Combined services budgets              | 268           | <b>268</b>    | -              |
| SF approval required, no increases allowed            | 1.4.2     | Admissions                             | 277           | <b>277</b>    | -              |
|   | 1.4.3     | Schools Forum                          | 46            | <b>30</b>     | (16)           |
| SF approval required, increases allowed               | 1.4.8     | Fees for pupils without SEN            | 110           | <b>110</b>    |                |
|   | 1.4.10    | 'Growth fund' for basic need           | 356           | <b>500</b>    | +144           |
| <b>Total</b>  |           |  | 1,155         | <b>1,283</b>  | 128            |

4.3 Further information on these proposed budget changes are set out below:

#### Combined services budgets

4.4 'Combined services budgets' are where the schools forum agreed prior to April 2013 a contribution from the schools budget to services which would otherwise be funded from other sources. Schools Forum approved the use of £268k of Schools Block funding for 2016-17 to support expenditure on the services set out in the table below. There are no new commitments or increases in budget for 2017-18.

#### Combined services budgets (No new commitments or increases allowed) £000

| Service                                     | 17-18       | 16-17       | Description of services provided  |
|---|-------------|-------------|---|
| Discretionary education psychology services | <b>£104</b> | £104        | Expenditure on non statutory services to provide all schools with a link EP, three Planning and Review meetings per year, availability for telephone consultations and email support as required. |
| Information, advice and support for parents | <b>£60</b>  | £60         | Expenditure on impartial information, advice and support services for children and young people with special educational needs and/or disabilities, and their parents.                            |
| Early Help advisors in schools              | <b>£104</b> | £104        | Expenditure on early intervention social care support for pupils in school, to provide a link worker for telephone consultations and email support as required.                                   |
| <b>Total</b>                                | <b>£268</b> | <b>£268</b> |   |

#### Transfer of Retained Duties Education Services Grant into the Schools Block

4.5 Schools block funding in 2017-18 now includes £315k previously paid to the Council as the retained duties element of the education services grant (ESG). This grant previously supported statutory services provided centrally on behalf of all schools, including:

- Education welfare services (prosecution of parents for non-attendance; tracking children missing from education; and issues relating to child employment).
- Asset management (capital programme planning and functions relating to academy leases)
- Statutory and regulatory duties – (including finance, HR and legal functions and the strategic planning of children's services).

4.6 In October 2016, Schools Forum gave their approval to retain £315k in 2017-18 to pay for the services that were previously funded by the retained duties element of ESG.

|                                 |            |
|---------------------------------|------------|
|                                 | £000       |
| Education Welfare services      | 83         |
| Capital planning                | 86         |
| Statutory and regulatory duties | <u>146</u> |
|                                 | <b>315</b> |



## Centrally retained budgets

| Approval required  | Services covered (and funding block)   |
|--|--|
| Schools forum approval is not required (although they should be consulted).  | <ul style="list-style-type: none"> <li>• high needs block provision</li> <li>• central licences negotiated by the Secretary of State</li> </ul>  |
| Schools forum approval is required for each line   | <ul style="list-style-type: none"> <li>• early years block provision</li> <li>• remission of boarding fees at maintained schools and academies</li> <li>• places in independent schools for non-SEN pupils</li> <li>• services previously funded by the retained rate of the ESG.</li> </ul>   |
| Schools forum approval is required for each line. The budget cannot exceed the 2016-17 agreed amount.  | <ul style="list-style-type: none"> <li>• admissions</li> <li>• servicing of schools forum</li> </ul>   |
| Schools forum approval is required for each line. The budget cannot exceed the 2016-17 agreed amount and no new commitments can be entered into. | <ul style="list-style-type: none"> <li>• capital expenditure funded from revenue so no new projects can be charged.</li> <li>• contribution to combined budgets – this is where the schools forum agreed prior to April 2013 a contribution from the schools budget to services which would otherwise be funded from other sources.</li> <li>• existing termination of employment costs (costs for specific individuals must have been approved prior to April 2013 so no new redundancy costs can be charged).</li> </ul> |
| Schools forum approval is required for each line including approval of the criteria for allocating funds to schools.                             | <ul style="list-style-type: none"> <li>• funding for significant pre-16 pupil growth, including new schools set up to meet basic need, whether maintained or academy</li> <li>• funding for good or outstanding schools with falling rolls where growth in pupil numbers is expected within three years.</li> </ul>  |

**2017-18 DSG allocation**

Tab 201718 DSG from

|  |  |  |
|--|--|--|
| <p>Behaviour Support</p>                     | <p>Funding to cover central Behaviour Support Team providing support to young people, as well as helping schools manage behaviour more effectively:</p> <ul style="list-style-type: none"> <li>• Providing 1:1 support for children and young people.</li> <li>• Observation and assessments as appropriate.</li> <li>• Advice and training to families and schools.</li> <li>• Evidence-based programmes for groups of pupils, such as Nurture groups, 'Friends for Life'.</li> <li>• Transition and anti-bullying programmes for vulnerable groups and whole class level.</li> <li>• Support to develop strategies to manage difficult behaviour.</li> <li>• Regular monitoring and support for ELSAs.</li> <li>• Promoting the social and emotional skills that underpin effective learning.</li> </ul> | <ul style="list-style-type: none"> <li>• Positive change for children and young people.</li> <li>• Bespoke training.</li> <li>• Dissemination of effective practice across schools.</li> <li>• The ability to manage resources on a needs basis and to respond to the individual needs of a school at short notice.</li> <li>• Ability to flexibly support staff in the workplace.</li> <li>• Expertise in understanding of the social and emotional aspects of emotional or challenging behaviour.</li> <li>• Suitably qualified and experienced staff available on a needs basis.</li> <li>• Responsive and supportive service.</li> </ul> |
| <p>8Maternity Cover / Trade Union Duties</p> | <p>Funding for eligible staff costs when there is an absence from school for official reasons. The main areas are: maternity, trade union duties, magistrates and jury service. Schools need to ensure sufficient staff are in place to meet their responsibilities. The incidence of these costs tends to be uneven, by year and by school.</p> <p>Allocations to schools under the 'suspended staff' policy.</p>   | <p>Main benefits include:</p> <ul style="list-style-type: none"> <li>• Schools pick up the costs for cover only, LA funds cost of substantive post.</li> <li>• Schools avoid double costs of substantive post and supply cover</li> <li>• scheme shares risk, eliminates unpredictability, and helps financial management.</li> </ul>  |

## ANNEX 3

| RBWM 2017-18 Schools Funding Formula - Comparison with 2016-17 |           |        |        |         |           |        |        |         |
|--|-----------|--------|--------|---------|-----------|--------|--------|---------|
|  | 2017-18   |        |        |         | 2016-17   |        |        |         |
|  | Amount    | Units  | Total  | %age    | Amount    | Units  | Total  | %age    |
|  | per pupil |        | £k     |         | per pupil |        | £k     |         |
|  | (£)       |        |        |         | (£)       |        |        |         |
| <b>PUPIL FUNDING</b>   |           |        |        |         |           |        |        |         |
| <b>1) Basic Entitlement</b>                                    |           |        |        |         |           |        |        |         |
| Primary  | 2,880     | 11,191 | 32,230 | 39.85%  | 2,880     | 10,904 | 31,404 | 39.34%  |
| Key Stage 3  | 3,950     | 4,585  | 18,111 | 22.39%  | 3,950     | 4,541  | 17,938 | 22.47%  |
| Key Stage 4  | 4,502     | 3,044  | 13,704 | 16.94%  | 4,502     | 3,000  | 13,506 | 16.92%  |
| <b>2) Deprivation</b>  |           |        |        |         |           |        |        |         |
|  |           |        | 2,927  | 3.62%   |           |        | 2,935  | 3.68%   |
| <b>3) Children in Care</b>                                     |           |        |        |         |           |        |        |         |
|  | 1,900     | 42     | 80     | 0.10%   | 1,900     | 56     | 106    | 0.13%   |
| <b>4) Low Cost High Incidence SEN</b>                          |           |        |        |         |           |        |        |         |
| Primary Prior Low Attain                                       | 1,951.2   | 1,389  | 2,711  | 3.34%   | 1,951.2   | 1,433  | 2,796  | 3.50%   |
| Secondary Prior Low Attain                                     | 1,654.6   | 1,466  | 2,425  | 3.00%   | 1,654.6   | 1,472  | 2,436  | 3.05%   |
| <b>5) English as an Additional Language</b>                    |           |        |        |         |           |        |        |         |
| EAL 3 Primary  | 323.1     | 1,161  | 375    | 0.46%   | 323.1     | 1,174  | 379    | 0.47%   |
| EAL 3 Secondary  | 987.9     | 190    | 188    | 0.23%   | 987.9     | 210    | 208    | 0.26%   |
| <b>OTHER FUNDING</b>   |           |        |        |         |           |        |        |         |
| <b>6) Lump Sum</b>   |           |        |        |         |           |        |        |         |
|  |           |        | 7,441  | 9.21%   |           |        | 7,441  | 9.32%   |
| <b>7) Rates</b>  |           |        |        |         |           |        |        |         |
|  |           |        | 693    | 0.86%   |           |        | 685    | 0.86%   |
| <b>MFG</b>   |           |        |        |         |           |        |        |         |
|  |           |        | 303    |         |           |        | 309    |         |
| <b>9) Capping</b>  |           |        |        |         |           |        |        |         |
|  |           |        | -303   |         |           |        | -309   |         |
| <b>Net MFG Cost</b>  |           |        |        |         |           |        |        |         |
| <b>10) TOTAL FUNDING SCHOOLS FORMULA</b>                       |           |        |        |         |           |        |        |         |
|  |           |        | 80,885 | 100.00% |           |        | 79,836 | 100.00% |

## ANNEX 4

|        |  | 2017-18 Budget Details |           |         |           | Changes Between Years |           |
|--------|--|------------------------|-----------|---------|-----------|-----------------------|-----------|
|        |  | Pupil                  | Budget    | MFG     | Post MFG  | Change In             | % age     |
|        |  | Numbers                | Pre MFG   |         | Budget    | Budget                | Change in |
|        |  |                        | £         | £       | £         | £                     | £         |
| 109818 | Alwyn Infant School                    | 302                    | 1,145,560 | 0       | 1,145,560 | 5,269                 | 0.46%     |
| 109819 | Courthouse Junior School               | 406                    | 1,482,689 | -4,910  | 1,477,779 | -15,392               | -1.03%    |
| 109820 | Riverside Primary School and Nursery   | 235                    | 1,028,197 | 23,760  | 1,051,958 | 9,854                 | 0.95%     |
| 109821 | Wessex Primary School                  | 405                    | 1,507,768 | 0       | 1,507,768 | -15,525               | -1.02%    |
| 109827 | Kings Court First School               | 217                    | 803,230   | 0       | 803,230   | 1,317                 | 0.16%     |
| 109832 | Waltham St. Lawrence CP School         | 101                    | 451,213   | -3,243  | 447,970   | -37,173               | -7.66%    |
| 109833 | Hilltop First School                   | 218                    | 885,136   | 695     | 885,831   | 2,634                 | 0.30%     |
| 109841 | Woodlands Park Primary School          | 155                    | 704,761   | -4,077  | 700,684   | 40,914                | 6.20%     |
| 109842 | Furze Platt Junior School              | 364                    | 1,341,172 | -57,976 | 1,283,196 | 58,030                | 4.74%     |
| 109843 | South Ascot Village School             | 211                    | 831,346   | -322    | 831,024   | -3,129                | -0.38%    |
| 109846 | Furze Platt Infant School              | 268                    | 1,025,581 | -5,120  | 1,020,461 | 4,303                 | 0.42%     |
| 109856 | Cookham Rise Primary School            | 210                    | 832,905   | 0       | 832,905   | 16,848                | 2.06%     |
| 109873 | Homer First School & Nursery           | 219                    | 900,260   | -14,354 | 885,906   | 67,405                | 8.24%     |
| 109884 | Alexander First School                 | 106                    | 491,692   | 35,692  | 527,384   | -25,006               | -4.53%    |
| 109888 | Oldfield Primary School                | 366                    | 1,394,243 | -36,112 | 1,358,131 | 176,878               | 14.97%    |
| 109897 | Oakfield First School                  | 287                    | 1,097,986 | -2,289  | 1,095,697 | -29,570               | -2.63%    |
| 109907 | Wraysbury Primary School               | 390                    | 1,486,302 | -22,763 | 1,463,539 | 48,205                | 3.41%     |
| 109938 | Larchfield Primary School              | 201                    | 858,576   | -444    | 858,132   | 10,931                | 1.29%     |
| 109951 | Bisham C of E Primary                  | 45                     | 281,269   | -7,423  | 273,846   | 10,845                | 4.12%     |
| 109952 | Braywood CE First School               | 147                    | 585,186   | 1,285   | 586,470   | 11,976                | 2.08%     |
| 109960 | Cookham Dean CE Aided Primary          | 186                    | 694,868   | -81     | 694,787   | 12,272                | 1.80%     |
| 109961 | Holy Trinity CE Primary School         | 211                    | 781,940   | 0       | 781,940   | 77                    | 0.01%     |
| 109969 | Boyne Hill CE Infant School            | 180                    | 728,967   | 27,210  | 756,177   | -9,421                | -1.23%    |
| 109991 | All Saints C.of E. Controlled          | 315                    | 1,232,485 | 0       | 1,232,485 | 110,010               | 9.80%     |
| 109996 | Eton Wick C.E. First School            | 140                    | 599,175   | 0       | 599,175   | -6,257                | -1.03%    |
| 109997 | The Queen Anne RF CE First             | 147                    | 617,008   | -2,896  | 614,112   | 3,851                 | 0.63%     |
| 110014 | The Royal School                       | 96                     | 424,360   | 16,133  | 440,493   | -4,760                | -1.07%    |
| 110018 | Holy Trinity CE Primary School         | 229                    | 843,133   | 2,864   | 845,997   | -10,920               | -1.27%    |
| 110019 | St Michael's CE Primary School         | 210                    | 781,470   | 0       | 781,470   | -14,060               | -1.77%    |
| 110020 | Cheapside CE Primary School            | 109                    | 455,093   | 0       | 455,093   | -13,419               | -2.86%    |
| 110022 | Clewer Green CE Aided First School     | 292                    | 1,089,234 | -255    | 1,088,979 | 13,230                | 1.23%     |
| 110023 | Trinity St Stephen CE First            | 145                    | 602,619   | 0       | 602,619   | 1,707                 | 0.28%     |
| 110030 | St Edmund Champion Catholic Primary    | 419                    | 1,455,015 | 0       | 1,455,015 | 40,496                | 2.86%     |
| 110031 | St Edward's Catholic First School      | 284                    | 1,059,397 | -25,060 | 1,034,336 | 52,288                | 5.32%     |
| 110086 | St. Edward's Royal Free Ecumenical Mid | 479                    | 1,936,415 | -6,151  | 1,930,264 | 92,041                | 5.01%     |
| 133580 | CHURCHMEAD C of E (VA) SCHOOL          | 370                    | 2,165,399 | -14,271 | 2,151,128 | -193,004              | -8.23%    |
| 140494 | Braywick Court                         | 107                    | 460,254   | 1,867   | 462,122   | 92,529                | 25.04%    |
| 142576 | Eton Porny C of E First School         | 130                    | 580,380   | -14,167 | 566,213   | 41,375                | 7.88%     |
| 142790 | Dedworth Green First School            | 161                    | 701,837   | 11,259  | 713,097   | -13,890               | -1.91%    |
| 136712 | Lowbrook Academy                       | 331                    | 1,131,282 | 0       | 1,131,282 | 92,644                | 8.92%     |

## ANNEX 4

|        |  | 2017-18 Budget Details |            |         |            | Changes Between Years |           |
|--------|--|------------------------|------------|---------|------------|-----------------------|-----------|
|        |  | Pupil                  | Budget     | MFG     | Post MFG   | Change In             | % age     |
|        |  | Numbers                | Pre MFG    |         | Budget     | Budget                | Change in |
|        |  |                        | £          | £       | £          | £                     | £         |
| 142846 | Holyport CE Primary School             | 365                    | 1,286,768  | 0       | 1,286,768  | -44,037               | -3.31%    |
| 141602 | Burchetts Green CE Infant School       | 57                     | 300,592    | 44,239  | 344,831    | -34,735               | -9.15%    |
| 141295 | Knowl Hill Church of England Primary A | 117                    | 499,691    | 71,199  | 570,890    | 93,896                | 19.68%    |
| 141601 | St Luke's CE Primary School            | 271                    | 1,111,499  | 27,054  | 1,138,553  | -22,914               | -1.97%    |
| 138635 | White Waltham CofE Academy             | 206                    | 756,520    | -611    | 755,909    | -12,122               | -1.58%    |
| 139882 | St Mary's Catholic Primary School      | 308                    | 1,146,527  | 0       | 1,146,527  | -1,018                | -0.09%    |
| 141818 | St. Francis Catholic Primary           | 210                    | 778,951    | -16,934 | 762,016    | -5,231                | -0.68%    |
| 137788 | Datchet St. Mary's School              | 227                    | 922,244    | 0       | 922,244    | -45,799               | -4.73%    |
| 141349 | St Peter's Church of England School    | 224                    | 965,826    | 19,153  | 984,980    | -17,711               | -1.77%    |
| 142791 | Dedworth Middle School                 | 463                    | 2,035,050  | -18,880 | 2,016,170  | -73,328               | -3.51%    |
| 138879 | Desborough College                     | 605                    | 2,950,844  | 20,729  | 2,971,572  | 550,337               | 22.73%    |
| 139971 | Holyport College                       | 353                    | 1,814,424  | -27,175 | 1,787,249  | 200,583               | 12.64%    |
| 138823 | CHARTERS SCHOOL                        | 1,216                  | 5,610,428  | 0       | 5,610,428  | -56,466               | -1.00%    |
| 142357 | Newlands Girls School                  | 945                    | 4,409,612  | 0       | 4,409,612  | 136,892               | 3.20%     |
| 141844 | The Windsor Boys' School               | 585                    | 3,076,345  | -1,056  | 3,075,289  | -199,312              | -6.09%    |
| 141852 | Windsor Girls' School                  | 505                    | 2,625,769  | 0       | 2,625,769  | -94,775               | -3.48%    |
| 137740 | Furze Platt Senior School              | 980                    | 4,728,535  | 0       | 4,728,535  | 158,829               | 3.48%     |
| 137695 | Cox Green School                       | 823                    | 3,914,105  | 0       | 3,914,105  | 249,552               | 6.81%     |
| 138342 | ALTWOOD CE SCHOOL                      | 460                    | 2,380,520  | -16,572 | 2,363,949  | -565,728              | -19.31%   |
| 110075 | Trevelyan Middle                       | 506                    | 2,095,696  | 0       | 2,095,696  | 206,286               | 10.92%    |
|        |  | 18,820                 | 80,885,347 | 0       | 80,885,347 | 1,049,603             | 1         |

## ANNEX 5

| <u>De- Delegation amounts with 2016-17 Comparisons</u> |                          |                          |            |  |
|--|--------------------------|--------------------------|------------|--|
| School Name  | De-Delegation<br>2017-18 | De-Delegation<br>2016-17 | Difference |  |
|  | £                        | £                        | £          |  |
| Alwyn Infant School                                    | 14,830                   | 15,318                   | -488       |  |
| Courthouse Junior School                               | 19,940                   | 20,051                   | -111       |  |
| Riverside Primary School and Nursery                   | 10,108                   | 10,293                   | -185       |  |
| Wessex Primary School                                  | 17,732                   | 18,855                   | -1,123     |  |
| Kings Court First School                               | 8,930                    | 9,306                    | -376       |  |
| Waltham St. Lawrence CP School                         | 4,040                    | 4,783                    | -743       |  |
| Hilltop First School                                   | 12,470                   | 12,674                   | -204       |  |
| Woodlands Park Primary School                          | 7,100                    | 6,954                    | 146        |  |
| Furze Platt Junior School                              | 17,660                   | 16,827                   | 833        |  |
| South Ascot Village School                             | 8,490                    | 8,992                    | -502       |  |
| Furze Platt Infant School                              | 12,920                   | 13,497                   | -577       |  |
| Cookham Rise Primary School                            | 8,700                    | 8,864                    | -164       |  |
| Homer First School & Nursery                           | 12,810                   | 11,600                   | 1,210      |  |
| Alexander First School                                 | 4,690                    | 5,301                    | -611       |  |
| Oldfield Primary School                                | 17,690                   | 16,912                   | 778        |  |
| Oakfield First School                                  | 12,830                   | 13,886                   | -1,056     |  |
| Wraysbury Primary School                               | 23,650                   | 23,057                   | 593        |  |
| Larchfield Primary School                              | 12,390                   | 12,718                   | -328       |  |
| Bisham C of E Primary                                  | 1,800                    | 1,922                    | -122       |  |
| Braywood CE First School                               | 6,380                    | 6,681                    | -301       |  |
| Cookham Dean CE Aided Primary                          | 7,690                    | 7,812                    | -122       |  |
| Holy Trinity CE Primary School                         | 8,640                    | 8,910                    | -270       |  |
| Boyne Hill CE Infant School                            | 7,600                    | 7,830                    | -230       |  |
| All Saints C.of E. Controlled                          | 13,403                   | 12,571                   | 832        |  |
| Eton Wick C.E. First School                            | 6,550                    | 6,940                    | -390       |  |
| The Queen Anne RF CE First                             | 5,930                    | 6,236                    | -306       |  |
| The Royal School                                       | 4,040                    | 4,236                    | -196       |  |
| Holy Trinity CE Primary School                         | 9,260                    | 9,539                    | -279       |  |
| St Michael's CE Primary School                         | 8,400                    | 8,883                    | -483       |  |
| Cheapside CE Primary School                            | 4,360                    | 4,783                    | -423       |  |
| Clewer Green CE Aided First School                     | 14,180                   | 14,408                   | -228       |  |
| Trinity St Stephen CE First                            | 6,250                    | 6,513                    | -263       |  |
| St Edmund Campion Catholic Primary                     | 17,710                   | 17,714                   | -4         |  |
| St Edward's Catholic First School                      | 15,110                   | 14,229                   | 881        |  |
| St. Edward's Royal Free Ecumenical Middl               | 17,470                   | 20,655                   | -3,185     |  |
| Churchmead CofE (VA) School                            | 9,250                    | 16,796                   | -7,546     |  |
| Braywick Court   | 0                        | 0                        | 0          |  |
| Eton Porny C of E First School                         | 0                        | 6,547                    | -6,547     |  |
| Dedworth Green First School                            | 0                        | 11,060                   | -11,060    |  |

## ANNEX 5

| School Name                          | De-Delegation  | De-Delegation  | Difference     |
|--------------------------------------|----------------|----------------|----------------|
|                                      | 20178-18       | 2016-17        |                |
|                                      | £              | £              | £              |
| Lowbrook Academy                     | 0              | 0              | 0              |
| Holyport CE Primary School           | 0              | 16,098         | -16,098        |
| Burchetts Green CE Infant School     | 0              | 0              | 0              |
| Knowl Hill Church of England Primary | 0              | 0              | 0              |
| St Luke's CE Primary School          | 0              | 0              | 0              |
| White Waltham CofE Academy           | 0              | 0              | 0              |
| St Mary's Catholic Primary School    | 0              | 0              | 0              |
| St. Francis Catholic Primary         | 0              | 0              | 0              |
| Datchet St. Mary's School            | 0              | 0              | 0              |
| St Peter's Church of England School  | 0              | 0              | 0              |
| Dedworth Middle School               | 0              | 22,825         | -22,825        |
| Desborough College                   | 0              | 0              | 0              |
| Holyport College                     | 0              | 0              | 0              |
| Charters School                      | 0              | 0              | 0              |
| Newlands Girls School                | 0              | 0              | 0              |
| The Windsor Boys' School             | 0              | 0              | 0              |
| Windsor Girls' School                | 0              | 0              | 0              |
| Furze Platt Senior School            | 0              | 0              | 0              |
| Cox Green School                     | 0              | 0              | 0              |
| Altwood CE School                    | 0              | 0              | 0              |
| Trevelyan Middle                     | 0              | 19,608         | -19,608        |
| <b>Totals</b>                        | <b>391,002</b> | <b>482,684</b> | <b>-91,682</b> |

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## ROYAL BOROUGH OF WINDSOR & MAIDENHEAD SCHOOLS FORUM

|                      |  |              |  |
|----------------------|--|--------------|--|
| Date:                | 31 Jan 2017  | AGENDA ITEM: | 6  |
| Title:               | Outcome of DFE Second Consultation on National Funding Formula |              |  |
| Responsible officer: | Kevin McDaniel, Head of Education and Schools                  |              |  |
| Contact officer:     | Phil Herd<br>Temporary Lead Accountant                         | Tel:         | 01628 794632   |
|                      |  | E-mail       | <a href="mailto:Phil.herd@rbwm.gov.uk">Phil.herd@rbwm.gov.uk</a> |

### 1 SUMMARY

- 1.1 This paper outlines the DFE proposals for a national funding formula for schools, high needs and central block. The impact on RBWM schools and central DSG is highlighted and there are suggestions on how the Council and Schools Forum may wish to respond to the consultation.

### 2 RECOMMENDATIONS

#### Schools Forum is asked to note

- 2.1 The DFE Proposals on School Funding
- 2.2 The DFE proposals on High Needs Funding
- 2.3 The DFE proposals Central Schools Services Funding

#### Schools Forum is asked to approve:-

- i) A process for responding to the consultation.

### 3 INTRODUCTION

- 3.1 The DFE launched the consultation on funding reform (schools and high needs) in March 2016. The original intention was for the results to be published in early autumn and implementation in April 2017. As members are aware the implementation has now slipped to April 2018.
- 3.2 The consultation covers all aspects of DSG excluding early years. That is schools block, high needs and central block. Each of these blocks is covered in separate sections.
- 3.3 These proposals are under consultation and a separate section explains a process of how we may engage in responding to the consultation. Whilst this report discusses three blocks, there are only two consultations, schools and high needs. The central schools services block is included within the schools block consultation. **The deadline for responses to the consultation is 22<sup>nd</sup> March 2017.**

### 4 SCHOOLS BLOCK

- 4.1 The immediate concern is how individual schools within RBWM fare under these proposals. A summary of the impact on RBWM schools is given in annex 1. A summary of the implications is given below :-

#### 2018-19 With Transitional Protection

- Primaries net loss = £68k
- Secondaries and middle schools net gain = £361k.
- All schools net gain = £293k

#### 2019-20 Without any Transitional Protection

primaries net loss = £138k  
secondaries and middle schools net gain = £349k  
All schools net gain = £211k.

- 4.2 Individual schools will have their own opinions and responses to the consultation. The purpose of this report is to set out general themes which may assist in the Council's, Forum and School's responses to the consultation. IE This is about the impact on the size of the RBWM schools block, rather than examining the impact on individual schools.
- 4.3 It is important to recognise that these changes are after the additional £2.5m that was distributed in 2015-16. This £2.5m was an initial step towards a national funding formula and should be taken into account when considering the impact this has had on RBWM schools. The £2.5m meant an additional 3% (appx) for schools at the time. This in effect means that all schools have gained by between 0.6% and 7%.
- 4.4 A summary of the proposals for individual factors is shown in annex 2. The major change, is that schools nationally currently allocate 76.6% via basic entitlement and the DFE proposal is that only 72.4% is distributed via this factor. This is a major movement and is unfavourable towards RBWM schools. RBWM for 2017-18 (formula proposal) allocates 77.9% via this factor.
- 4.5 The DFE document argues that some local authorities do not use the deprivation factors to a large extent because derivation is evenly spread across their schools. This is the basis for the argument to increase deprivation funding nationally. The document makes no reference to the narrowing of the attainment gap and exactly why this additional investment in deprivation is required. Pupil Premium Grant arrangements will remain unchanged and £2.4bn is distributed via this grant. This is not in-significant, representing 7.5% of the national funding pot. Other general observations regarding the formulae are given below:-
- A general theme within the document is that it is about re - distributing funds rather than a critical examination of what a school needs to operate. It could be argued that a starting point should be what a typical primary and a typical secondary school needs to operate at a basic level. Additional needs and circumstances could be added on to that. IE a needs led approach, rather than a redistribution.
  - The next major change is that schools currently allocate 4.3% of funding via low attainment and the proposal is to increase this to 7.5%. This is probably a favourable movement as RBWM currently allocates 6.3% via this factor. The rationale behind this movement is that it targets funds to individual pupils with additional educational needs.
  - The DFE proposal is to set the lump sum at £110,000. In RBWM the figures are primary £124k and secondary £125k. The immediate concern maybe is that this is a reduction. That is not necessarily the situation. Schools may gain by having a smaller lump sum and more money in basic entitlement. It depends entirely on the size of the school and therefore schools will have differing opinions on this. National distribution and local

formulae can be confused. The current lump sum, is a local decision, there is no recognition of lump sums in the current national distribution system. This is a new factor as far as national distributions are concerned. The largest **overall** gainers under the schools block proposals are small rural schools, typically +20%. 726 schools gain by 10% or more and only approximately 50 of these are in non rural areas. It could be argued that having this factor discourages school mergers and therefore efficiencies.

- There has been strong pressure from the f40 group to have a national sparsity factor. The new formula allows for this but only distributes 0.1% (£27m) via this factor. Given that small rural schools benefit from the lump sum (see 4.6 above), the validity of a sparsity factor is questionable. The sparsity factor is also over complex given the amount of money it distributes.
- The primary secondary ratio is 1:1.29 nationally and the proposal is to maintain this at the current rate. In RBWM the rate is 1:1.26, which is why secondary schools favour better than primaries do. The document states “a recent review of the existing evidence on the impact of investment across phases (Gibbons and McNally, 2013) found that the impact of additional spend is similar across the country and that there is no strong case to make significant change to the current balance between the phases”
- The formula allows for an overall floor of -3%, which means no school will lose by more than 3%, when this formula is introduced in full. It could be argued that this is not a complete formula review because much of the previous formula funding is within the base. RBWM schools do not benefit from this because no RBWM school loses by the maximum 3%. Removing this floor and investing more into basic entitlement, would therefore benefit RBWM schools. (It is suggested that the capping arrangements are costing £200m) The MFG at -1.5% will remain.
- Schools gains are capped at 3% per pupil in 2018-19 and a further 2.5% in 2019-20. This does not impact on RBWM schools over the two year period, since no schools receives gains of more than 5.5%.
- The losses and gains arrangements only apply up until 2019-20. The arrangements beyond that are unclear. Schools are continually encouraged to set three year plans etc. but the DFE are only guaranteeing funding for 2 years.

4.5 The above observations are high level. This report cannot possibly cover all the details within the DFE document.

## **5 HIGH NEEDS BLOCK**

5.1 The major change is that the high needs block allocations will be made to local authorities via a national formula rather than historical spend. It is proposed to use “proxy” data such as deprivation rather than factors which reflect actual spend (e.g. EHCP’s). The reason for this is that the number of EHCP for example, would give perverse incentives to issue more plans. The broad formula factors are outlined in the table within 5.3 below.

5.2 The important headline is that no local authority will lose funding when the new high needs block formula is introduced. What is not clear is the point at which local authorities will begin to lose funding, which is either 2019-20 or 2020-21. This is significant for RBWM

because the funding floor protection is £2.3m. IE If the funding floor is to disappear in 2019-20, then the HNB allocation for that year would be £2.3m lower. This is unlikely to happen because there will no doubt be transitional arrangements which would phase such a reduction over 4 or 5 years.

5.3 A loss of £2.3m funding within the HNB is disappointing given the pressures that exist within that block. However from the overall picture on the DSG as shown in 7 below, it would appear that DFE are effectively reversing the movements between the schools and high needs block that have been previously agreed and reported.

5.4 The proposals around applying the formula for the high needs block are complex, whilst the totals allocated via each factor appear over simplistic. The details around how the calculations will operate could be covered in the consultation process. A brief outline of the formula and the %ages proposed to be allocated via these factors are given below:-

|                       |                   | %age To Be Allocated |
|-----------------------|-------------------|----------------------|
| Population            |                   | 50%                  |
| Derivation Factors    | Free School Meals | 10%                  |
|                       | IDACI             | 10%                  |
| Prior Attainment      | Key Stage 2       | 7.5%                 |
|                       | Key Stage 4       | 7.5%                 |
| Health and Disability | Bad Health        | 7.5%                 |
|                       | Disability        | 7.5%                 |

5.5 A brief summary of early observations surrounding the proposed allocations are given below:-

- The initial comment, is that the percentages used are over simplistic and do not reflect the percentages used within the schools block.
- The population is 0 to 18 but the high needs block supports young people up to the age of 25. It may however be difficult to obtain census information for people aged up to 25. If more than 50% was allocated via this factor, it would favour RBWM.
- The schools block puts more emphasis on free school meals than IDACI. (Approx. 1:1.24) A greater weighting to FSM would favour RBWM.
- The schools block gives a greater emphasis to prior attainment than the high needs proposals do. If prior attainment were to increase, at the expense of deprivation, it would favour RBWM.
- The information used to collect information on bad health is “ The number of children aged 0 to 16 in bad or very bad health who were resident in the local authority area, as

reported by parents in the 2011 general population census”. This would not appear to be robust source of data for the distribution of funds.

- 5.6 The formula projections are based on current numbers and future data sets (e.g. movement in population) will change future allocations. The high needs block has not increased in line with pupil numbers over recent years and this situation is not likely to change. The document does state that the overall funding envelope for high needs will be the major factor in future allocations. Population in a local authority could therefore increase but the attached funding decrease, if the national pot remains static. E.g. If the national population increases by 0.05% and an authority population increases by 0.025% then that authority will suffer a loss, if the national pot for population remains static.
- 5.7 The overriding concern is that there is a risk the HNB allocation could reduce by approximately £2.3m over the next 5-6 years. This has to be built into the DSG strategy, referred to in agenda item 1 of this forum. The formula allocations will become clearer in the summer. At that point high needs block allocations need to be projected as accurately as is possible, over the next few years. These projections need to be built into the DSG strategy.

## 6 Central School Services Block

- 6.1 The DFE propose a fourth DSG Block from April 2018 entitled “central school services block” (cssb) which will be a combination of the current schools block central spend and the ESG retained duties. The central schools services block is relatively small (£1.1m) but the proposals around allocation and spend are complex.
- 6.2 It is intended to introduce a formula ( see 6.6 below) which allocate funds for cssb in future which will be based upon historical data, pupil numbers and deprivation. The headline figure is that this formula would lead to a reduction in funding of £290k, which is significant given the current allocation is only £1.1m. The proposals for transitional arrangements is that losses are limited to 2.5% in 2018-19 and 2019-20.
- 6.3 The current schools block central spend is summarised in the following table:-

| S251 Line |                                   |                             | Amount<br>£k | Amount<br>£k |
|-----------|-----------------------------------|-----------------------------|--------------|--------------|
| 1.4.1     | Contribution to Combined Budgets  | Early Help Social Work      | 104          |              |
|           |                                   | Educational Psychology      | 104          |              |
|           |                                   | Other Combined Budgets      | 60           |              |
|           | Sub Total 1.4.1                   |                             |              | 268          |
| 1.4.2.    | School Admissions                 |                             |              | 277          |
| 1.4.3     | Servicing Schools Forum           |                             |              | 46           |
| 1.4.8.    | Fees to Indep Schools without SEN |                             |              | 110          |
| 1.4.13    | Other Items                       | Licences and SIMS           | 98           |              |
|           |                                   | Contributions to Properties | 69           |              |
|           |                                   |                             |              | 167          |
|           | Grand Total                       |                             |              | 868          |

- 6.4 The ESG retained element of £315k was covered in detail at Octobers Forum and a summary of the spend is repeated below:-

|                                 |     |
|---------------------------------|-----|
|                                 | £k  |
| Education Welfare services      | 83  |
| Capital planning                | 86  |
| Statutory and regulatory duties | 146 |
| Total                           | 315 |

- 6.5 It is likely that any future reduction in cssb allocations will have to be met by savings in the budget lines shown in 6.3. This may well be possible but there will not be an opportunity to use cssb resources to fund high needs pressures. (This will be the case with some local authorities).
- 6.6 The total current resources within cssb are £1.183m which is the £868k in 6.3 plus the ESG of £315k. This figure is based upon historical spend and as with high needs, the DFE want to move to a national formula for re-distribution. The proposal is that historic commitments continue to be funded via historical spend and the remaining funding ( on-going responsibilities) be distributed 90% pupil numbers and 10% deprivation.
- 6.7 Historic commitments for RBWM are £268k, which directly relate to line 1.4.1, shown in the table within 6.3 above. Other local authorities will include spend on termination of employment costs, capital expenditure funded from revenue, prudential borrowing, exceptions agreed by the Secretary of State, and other specific grants. RBWM does not have spend in these areas and therefore the total spend for RBWM is relatively low compared to other lea's. The proposal to protect this funding on historical spend does not therefore favour RBWM. (see 6.8 below.)
- 6.8 RBWM budget on historical spend is 0.09% of the national budget, whilst RBWM schools population is 0.26% of the total population. It would therefore be beneficial for RBWM if these funds were distributed according to pupil numbers. Basing discretionary spend of this nature, according to historical spend is a disincentive to save money and/or use resources within the other blocks. Also, many LA's use this spend for invest to save initiatives. Prudential borrowing, is by definition, invest to save. It would therefore appear that local authorities will be protected on their spend, whilst also benefiting from their corresponding savings elsewhere within the DSG.
- 6.9 The remaining £915k, (£1.183m - £268k) will be allocated 90% according to pupils and 10% on deprivation. RBWM spending share on on-going commitments is 0.38%, which is higher than the pupil proportion of 0.26%. Therefore allocating funding on the basis of population, will obviously have an adverse impact on RBWM. To some extent this is a penalty for being a small local authority. Take for example the admissions service. Larger local authorities should spend less per pupil on admissions because they have the benefit of economies of scale. It could therefore be argued that the formula should include a lump sum (say £250k) for every local authority and then allocate the remainder on pupil numbers and deprivation.

## **7 Overall Impact on DSG**

- 7.1 Each funding reform has the objective of being more clear and transparent. In 2013-14 there was one overall DSG and from April 2019 there will be four blocks, each with their own set of associated regulations. Dividing the DSG up into blocks means forum members will easily lose sight of the overall impact these reforms are having. The table below attempts to bring together all the formula changes in the DSG. It ignores the impact of transitional arrangements, ie assumes the formulae are introduced in full in the first year. For early years it ignores the impact of the additional 15 hours.

**This is illustrative only - if formulae fully implemented**

| Note |  | £k      |
|------|--|---------|
| 1    | Increase in School Block Funding 2015-16 | 2,500   |
| 2    | Net Gain in Schools Block                | 211     |
| 3    | Gain in Early Years Block                | 1,136   |
| 4    | Loss in High needs Block                 | - 2,297 |
| 5    | Loss in Central Schools Services Block   | -290    |
|      |  |         |
|      | Net Gains                                | 1,260   |

## Notes

1. Schools were allocated an additional £2.5m in 2015-16 as a move towards a national funding formula. Therefore this has to be included.
2. This net gain is in addition to 1.
3. This is 3 and 4 year olds, new formula distribution, including nursery schools protection. It ignores the impact of the additional 15 hours.
4. This would be the figure if the overall protection was removed. The allocations beyond 2018-19 are unclear.
5. Similar to 4. The allocations beyond 2019-20 are unclear.

7.2 The general conclusion is that DFE have moved money between schools block and high needs whilst there is real growth in early years.

## 8 Consultation Process

8.1 It is suggested that the consultation process adapted in stage 1 is repeated for stage 2. That would involve having an informal meeting of forum members and explaining the Council's draft response to the consultation. Forum members can then formulate their own response.

|  |                                     |             |        | <b>ANNEX 1</b> |        |
|--|-------------------------------------|-------------|--------|----------------|--------|
|  | 2016-17                             | Full Impact | Change | 2018-19        | Change |
|  | Budget                              | Formula     |        |                |        |
|  | £'000                               | £'000       | %age   | £'000          | %age   |
| Braywick Court School                                  | Expanding school - no data provided |             |        |                |        |
| Oldfield Primary School                                | 1,181                               | 1,229       | 4.1%   | 1,213          | 2.7%   |
| Furze Platt Junior School                              | 1,225                               | 1,258       | 2.7%   | 1,258          | 2.7%   |
| St Francis Catholic Primary School, South Ascot        | 765                                 | 783         | 2.4%   | 783            | 2.4%   |
| Oakfield First School                                  | 1,125                               | 1,151       | 2.3%   | 1,151          | 2.3%   |
| Alwyn Infant School                                    | 1,140                               | 1,164       | 2.1%   | 1,164          | 2.1%   |
| Wraysbury Primary School                               | 1,415                               | 1,437       | 1.6%   | 1,437          | 1.6%   |
| Furze Platt Infant School                              | 1,016                               | 1,028       | 1.2%   | 1,028          | 1.2%   |
| Homer First School and Nursery                         | 819                                 | 827         | 1.0%   | 827            | 1.0%   |
| St Edward's Catholic First School                      | 982                                 | 992         | 1.0%   | 992            | 1.0%   |
| Trinity St Stephen CofE Aided First School             | 601                                 | 605         | 0.7%   | 605            | 0.7%   |
| Clewer Green CofE First School                         | 1,076                               | 1,078       | 0.2%   | 1,078          | 0.2%   |
| South Ascot Village Primary School                     | 834                                 | 835         | 0.1%   | 835            | 0.1%   |
| All Saints CofE Junior School                          | 1,122                               | 1,124       | 0.2%   | 1,124          | 0.2%   |
| The Queen Anne Royal Free CofE Controlled First School | 610                                 | 611         | 0.2%   | 611            | 0.2%   |
| Riverside Primary School and Nursery                   | 1,097                               | 1,096       | -0.1%  | 1,096          | -0.1%  |
| Eton Wick CofE First School                            | 605                                 | 605         | 0.0%   | 605            | 0.0%   |
| Woodlands Park Primary School                          | 660                                 | 658         | -0.3%  | 658            | -0.3%  |
| Cookham Rise Primary School                            | 816                                 | 811         | -0.6%  | 811            | -0.6%  |
| Holy Trinity CofE Primary School, Cookham              | 782                                 | 777         | -0.6%  | 777            | -0.6%  |
| St Mary's Catholic Primary School, Maidenhead          | 1,144                               | 1,136       | -0.7%  | 1,136          | -0.7%  |
| Waltham St Lawrence Primary School                     | 485                                 | 481         | -0.8%  | 481            | -0.8%  |
| Lowbrook Academy                                       | 1,037                               | 1,029       | -0.8%  | 1,029          | -0.8%  |
| King's Court First School                              | 802                                 | 795         | -0.9%  | 795            | -0.9%  |
| Bisham CofE Primary School                             | 263                                 | 261         | -0.8%  | 261            | -0.8%  |
| Cheapside CofE Primary School                          | 469                                 | 464         | -1.1%  | 464            | -1.1%  |
| Larchfield Primary and Nursery School                  | 847                                 | 839         | -0.9%  | 839            | -0.9%  |
| Braywood CofE First School                             | 574                                 | 568         | -1.0%  | 568            | -1.0%  |
| Boyne Hill CofE Infant and Nursery School              | 766                                 | 758         | -1.0%  | 758            | -1.0%  |
| St Michael's CofE Primary School, Sunninghill          | 796                                 | 786         | -1.3%  | 786            | -1.3%  |
| Eton Porny CofE First School                           | 518                                 | 511         | -1.4%  | 512            | -1.2%  |
| Holy Trinity CofE Primary School, Sunningdale          | 857                                 | 844         | -1.5%  | 846            | -1.3%  |
| St Edmund Campion Catholic Primary School, Maidenhead  | 1,415                               | 1,393       | -1.6%  | 1,395          | -1.4%  |
| Hilltop First School                                   | 883                                 | 869         | -1.6%  | 872            | -1.2%  |
| White Waltham CofE Academy                             | 767                                 | 755         | -1.6%  | 757            | -1.3%  |



| <b>ANNEX 1</b>   |                                     |             |        |       |         |        |
|--|-------------------------------------|-------------|--------|-------|---------|--------|
|  | 2016-17                             | Full Impact | Change |       | 2018-19 | Change |
|  | Budget                              | Formula     |        |       |         |        |
|  | £'000                               | £'000       | %age   | £'000 | £'000   | %age   |
| Wessex Primary School  | 1584                                | 1557        | -1.7%  | -27   | 1563    | -1.3%  |
| Courthouse Junior School   | 1493                                | 1466        | -1.8%  | -27   | 1473    | -1.3%  |
| Holyport CofE Primary School   | 1331                                | 1306        | -1.9%  | -25   | 1313    | -1.4%  |
| Cookham Dean CofE Primary S  | 683                                 | 669         | -2.0%  | -14   | 674     | -1.3%  |
| Burchetts Green CofE Infants'  | 379                                 | 371         | -2.1%  | -8    | 375     | -1.1%  |
| Dedworth Green First School  | 727                                 | 711         | -2.2%  | -16   | 718     | -1.2%  |
| The Royal First School   | 445                                 | 435         | -2.2%  | -10   | 440     | -1.1%  |
| Alexander First School   | 552                                 | 540         | -2.2%  | -12   | 546     | -1.1%  |
| Knowl Hill Church of England F   | 476                                 | 465         | -2.3%  | -11   | 471     | -1.1%  |
| Datchet St Mary's CofE Primary   | 965                                 | 942         | -2.4%  | -23   | 952     | -1.3%  |
| St Luke's CofE Primary School  | 1157                                | 1128        | -2.5%  | -29   | 1141    | -1.4%  |
| Primary  | 39286                               | 39148       | -0.4%  | -138  | 39218   | -0.2%  |
| Churchmead Church of Englan  | 2344                                | 2410        | 2.8%   | 66    | 2410    | 2.8%   |
| Charters School  | 5693                                | 5804        | 1.9%   | 111   | 5804    | 1.9%   |
| Furze Platt Senior School  | 4594                                | 4675        | 1.8%   | 81    | 4675    | 1.8%   |
| Newlands Girls' School   | 4251                                | 4324        | 1.7%   | 73    | 4324    | 1.7%   |
| Altwood CofE Secondary Schoo   | 2912                                | 2959        | 1.6%   | 47    | 2959    | 1.6%   |
| Windsor Girls' School  | 2702                                | 2743        | 1.5%   | 41    | 2743    | 1.5%   |
| The Windsor Boys' School   | 3246                                | 3274        | 0.9%   | 28    | 3274    | 0.9%   |
| Cox Green School   | 3699                                | 3695        | -0.1%  | -4    | 3695    | -0.1%  |
| Dedworth Middle School   | 2089                                | 2084        | -0.2%  | -5    | 2084    | -0.2%  |
| Desborough College   | 2432                                | 2413        | -0.8%  | -19   | 2413    | -0.8%  |
| Trevelyan Middle School  | 1889                                | 1869        | -1.1%  | -20   | 1869    | -1.1%  |
| St Peter's Church of England M   | 1004                                | 983         | -2.1%  | -21   | 991     | -1.3%  |
| St Edward's Royal Free Ecumen  | 1838                                | 1809        | -1.6%  | -29   | 1813    | -1.4%  |
| Holyport College   | Expanding school - no data provided |             |        |       |         |        |
| Secondary  | 38693                               | 39042       | 0.9%   | 349   | 39054   | 0.9%   |
|  | 77979                               | 78190       | 0.3%   | 211   | 78272   | 0.4%   |
| Primary Schools are set to lose 0.4%, 0.2% in the first year. Primary schools losses range from -2.5% to gains of 4% |                                     |             |        |       |         |        |
| Secondary Schools are set to gain by 0.9%. Secondaries range is -1.6% to +2.8%                                       |                                     |             |        |       |         |        |

**THE DFE FUNDING PROPOSALS FOR 2018-19 COMPARED TO CURRENT FORMULAE**

**Annex 2**

| Factor               | A<br>DFE NATIONAL FUNDING FORMULA PROPOSAL |               |            |            |                  | B<br>2016-17 NATIONAL SPEND |               | C<br>RBWM FORMULA PROPOSAL 2017-18 |               |          |                  |
|----------------------|--|---------------|------------|------------|------------------|-----------------------------|---------------|------------------------------------|---------------|----------|------------------|
|                      | Weighting                                  | Amounts<br>£m | Values     |            |                  | Weighting                   | Amounts<br>£m | Weighting                          | Amounts<br>£m | Primary  | Secondary        |
|                      |  |               | Primary    | Secondary  |                  |                             |               |                                    |               |          |                  |
| Basic Entitlement    | 72.4%                                      | 23,255        | £2,712     | KS3<br>KS4 | £3,797<br>£4,312 | 76.6%                       | 24,369        | 77.9%                              | 63            | £2,880   | £3,950<br>£4,502 |
| <b>Deprivation</b>   |  |               |            |            |                  |                             |               |                                    |               |          |                  |
| Ever 6 FSM           | 5.4%                                       | 1,746         | £540       |            | £785             | ) 4.5%                      | 1,432         | 2.2%                               | 2             | £697     | £605             |
| Current FSM          | )  |               | £980       |            | £1,225           | )                           |               |                                    |               |          |                  |
| IDACI A              | )  |               | £575       |            | £810             | )                           |               |                                    |               | £776     | £909             |
| IDACI B              | )  |               | £420       |            | £600             | )                           |               |                                    |               | £776     | £909             |
| IDACI C              | )  |               | £360       |            | £515             | )                           |               |                                    |               | £776     | £909             |
| IDACI D              | 3.9%                                       | 1,239         | £360       |            | £515             | ) 3.1%                      | 992           | 1.2%                               | 1             | £776     | £909             |
| IDACI E              | )  |               | £240       |            | £390             | )                           |               |                                    |               | £518     | £606             |
| IDACI F              | )  |               | £200       |            | £290             | )                           |               |                                    |               | £466     | £466             |
| Low Prior Attainment | 7.5%                                       | 2,394         | £1,050     |            | £1,550           | 4.3%                        | 1,367         | 6.3%                               | 5             | £1,951   | £1,655           |
| EAL                  | 1.2%                                       | 388           | £515       |            | £1,385           | 0.9%                        | 282           | 1.2%                               | 1             | £323     | £988             |
| Sparsity             | 0.1%                                       | 27            | 0- £25,000 |            | £0- 65,000       |                             | 15            |                                    |               | n/a      | n/a              |
| Mobility             | 0.1%                                       | 23            | n/a        |            | n/a              | 0.1%                        | 23            |                                    |               | n/a      | n/a              |
| Lump Sum             | 7.1%                                       | 2,263         | £110,000   |            | £110,000         | 8.2%                        | 2,610         | 8.8%                               | 7             | £123,738 | £125,155         |
| Premises Factors     | 1.8%                                       | 569           | n/a        |            | n/a              | 1.8%                        | 567           | 1.2%                               | 1             |          |                  |
| Growth Fund          | 0.5%                                       | 167           | n/a        |            | n/a              | 0.5%                        | 174           | 1.2%                               | 1             | £500,000 |                  |
| <b>Totals</b>        | <b>100.0%</b>                              | <b>32,071</b> |            |            |                  | <b>100.0%</b>               | <b>31,831</b> | <b>100.0%</b>                      | <b>81</b>     |          |                  |

By virtue of paragraph(s) 3 of Part 1 of Schedule 12A of the Local Government Act 1972.

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