

AGENDA SUPPLEMENT (1)

Meeting: Schools Forum
Place: Kennet Room - County Hall, Trowbridge
Date: Thursday 14 January 2016
Time: 1.30 pm

The Agenda for the above meeting was published on 06/01/16. Additional documents are now available and are attached to this Agenda Supplement.

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This Agenda and all the documents referred to within it are available on the Council's website at www.wiltshire.gov.uk

- 6 **Reports from Working Groups (Pages 3 - 6)**
- 7 **Budget Update - DSG Schools Block (Pages 7 - 12)**
- 8 **Schools Funding Settlement and Budget 2016-17 (Pages 13 - 24)**
- 9 **Special Schools Funding (Pages 25 - 28)**
- 10 **Growth Fund (Pages 29 - 32)**

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Schools Funding Working Group

6th January 2016, Hardenhuish School, Chippenham –

Minutes

Present: Neil Baker, Martin Watson, Jan Hatherell, John Hawkins, Grant Davis, Susan Tanner, Tracey Cornelius, Roz Way (Item 2 only)

Apologies: Phil Cook, Andy Bridewell, Catriona Williamson

1	<p>Minutes from Previous Meeting</p> <p>The minutes from the previous meeting were discussed and agreed. SFWG raised a challenge to the LA as a result of the under-achievement of the RAG savings. It was requested that all of the placements to Independent Special Schools be reviewed to ensure that an in-house provision would not be appropriate. The savings within the High Needs Block were still a significant cause for concern and therefore a review of all the ISS placements was requested. In addition, a review of the outcomes from the tribunals was requested.</p>	
2	<p>Letter received from Rowdeford regarding Special School Funding</p> <p>GD introduced a letter which had been received from the Headteacher at Rowdeford School. RW also added further details and the issues currently being experienced by the Special Schools.</p> <p>SFWG discussed the issues raised in the letter and it was felt that simply passporting additional funds to Special Schools would present a short-term partial fix but would not address the real situation facing the High Needs sector.</p> <p>The award of the additional £5.7m ‘fairer funding’ monies has been baselined into the authorities SBUF (Schools Block Unit of Funding) and therefore was to address the issue of Wiltshire being one of the poorest funded authorities in the Country. The funding had been built into the AWPU’s awarded to schools and distributed according to the different AWPU ratio’s for KS1&2, KS3 and KS4.</p> <p>It was felt by the SFWG that there was some confusion that the ‘fairer funding’ had been awarded to help offset increased staffing costs in schools, whereas it had been awarded to address the under-funded position of Wiltshire schools, compared to the national position.</p> <p>SFWG noted that there had been some national recognition of the cost pressures within the high needs sector nationally and had made an extra £92.5million available nationally for the DSG funding. Wiltshire’s share of this being £0.823million.</p> <p>The group all agreed that the new National Funding Formula, set for 2017-18 should help to address the picture of schools funding but that the impacts of any future decisions on Special Schools would receive greater consideration.</p>	
3	<p>Budget Update – DSG Schools Block</p> <p>GD presented a paper to outline the proposals for funding of the DSG Schools Block for 2016-17. Due to the proposal for a new National Funding Formula for 2017-18, there are no real changes to the schools block funding for 2016-17.</p> <p>The ‘fairer funding’ monies have now been baselined into Wiltshire’s school funding and the Schools Block Unit of Funding for 2016-17 will be £4,302.45,</p>	

	<p>up by £0.04 per pupil from 2015-16.</p> <p>Wiltshire has a pupil population for funding of 60,467 which means that the DSG Schools Block total funding is £260.156million for 2016-17.</p>	
4	<p>Schools Funding Settlement for 2016-17</p> <p>GD presented a paper to the group detailing the funding settlement for 2016-17. The key points from the paper were;</p> <ul style="list-style-type: none"> - Pupil premium rates unchanged form 2015-16 - Total pupil premium grant to Wiltshire expected to be in excess of £14million - Fairer funding monies of £5.7million (before deduction for CRC) have been baselined into the Wiltshire SBUF for funding. - DSG funding rolled forward from last year (protected) - Additional £92.5million awarded nationally for High Needs, Wiltshire's share being £0.823million. - Pupil growth in the Schools block of 841 pupils. - Early Years funding provisionally based upon the 2015-16 allocation but subject to amendment for January census data. - Group titled "High needs: place change request process – technical note 2016 to 2017" <p>The total DSG awarded to Wiltshire for 2016-17 is £311.246 million (For comparator purposes, £317.275 if we include the post 16 places in mainstream schools special school and also the places in special academies.)</p>	
5	<p>High Needs Place Funding 2016-17</p> <p>GD presented a paper which set out the final agreed number of planned high needs places to be submitted to the EFA as part of the schools budgeting process for funding in 2016-17.</p> <p>Additionally it was explained that as the revised number of places was agreed to be implemented from September 2016, for the maintained schools, working to a financial year, that their number of planned places would recognise that that; the school would receive funding as follows;</p> <ul style="list-style-type: none"> - 5/12ths of the year with at current planned places - 7/12ths of the year at the revised number of planned places <p>As academies are funded on the basis of an academic year, their planned number of places will accord with the date for the revision of the planned places.</p> <p>The implications of the change in place numbers was presented showing the change over the next two financial years.</p>	
6	<p>Pupil Growth Fund 2016-17</p> <p>The current Growth Fund operated by the LA is compliant with the EFA guidance and it was therefore proposed that no changes to the criteria be introduced for 2016-17.</p> <p>The budget for 2015-16 had been set at £1m and the out-turn is expected to be below this level. Given the increase in pupil numbers in Wiltshire from 15-16 to</p>	

	16-17, it was agreed that this budget should be retained at its current level. The LA has submitted a bid to the MOD's Education Support Fund which would help towards funding	
7	AOB Removal of Advance Use of Formula Capital – discussed and agreed Proposal of 1/12 th budgets for schools funding	
8	Date of Next Meeting 7 th March 2016, 8.30am at Hardenhuish School	

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Wiltshire Council

Schools Forum

14th January 2016

Review of High Needs Places for 2016-17

Purpose of report

1. To provide an update following the submission of the "*High Needs funding 2016 to 2017 - place change request.*", issued by the Education Funding Agency (EFA) in September 2015,

High Needs Places for 2016 to 2017

2. At its meeting in November 2015, Schools Forum agreed to implement an option, 'Option 5' which enabled the revision of the number of agreed 'planned places' based upon actual pupil numbers at two points in time (May and October 2015). This option will enable the LA to maximise the number of places funded, but also to still retain the mechanism to recoup - funding using the top ups mechanism.
3. The revised number of High Needs places was required to be submitted to the EFA in November 2015, for all Academy schools, following agreement with each institution. All academies were contacted to ensure agreement.
4. There was only one Academy which would not agree to the revised planned place numbers and it will now be for the EFA to agree the place numbers using the ILR (Individualised Learner Records) or census data. The EFA consider that the planned place numbers should incorporate both the pre and post 16 places as a total.
5. Place numbers at maintained schools did not require submission as part of the process but will be submitted as part of the annual Schools Budgets return (Authority Pro-Forma Tool) to the EFA in January 2016.
6. It was agreed, in accordance with the EFA's guidance that these changes should apply from the start of the 2016-17 academic year. This would accord with the plans of schools working in academic years and also be consistent across both academies and maintained schools.

7. The revised number of places are summarised in the table below and a full breakdown detailed in Appendix 1.

PLACES	Academic Year	
	2015-16	2016-17
Maintained ELP's	96	83
Academy ELP	264	254
Maintained RB's	117	114
Academy RB	150	126
TOTAL	627	577

Financial Perspective for Wiltshire

8. The revision in planned place numbers was not designed as a cost-saving exercise but to enable LA's to revise their planned place numbers in accordance with the demand for places.
9. Due to the LA working in financial years, April to March and the High Needs places being allocated on an academic year, September to August, the LA's 2016-17 financial year will be a transition year where changes in planned places will be based upon funding of;
- 5/12ths of the 2015-16 academic year planned places (Apr 16 – Aug 16)
 - 7/12ths of the 2016-17 academic year planned places (Sept 16 – Mar 17)
10. Therefore for the 2016-17 financial year, there will be a transition period where all schools move from being funded for the current number of places to their new number of places. As a result, maintained schools will appear to be funded for an unusual number of places on their Funding Certificates, for example;

School	Places	5/12ths	7/12ths	TOTAL
Current Places 15-16 Academic Year	11	4.58		4.58
Revised Places 16-17 Academic Year	8		4.67	4.67
TOTAL Funded Places 16-17 Financial Year				9.25

11. For Academy schools, whilst there will also be a transition period in terms of funding by the LA. However, as Academies are currently funded for an academic year, there will be no transition period in terms of place funding and their Funding Certificates issued directly by the EFA for the 2016-17 year will show the correct whole number of places to be funded.

12. The table below sets out the net impact of the reduction in the number of planned places over the 2016-17 and 2017-18 financial years. Whilst there will be a significant saving in the 2016-17 financial year, the full financial impact will not be achieved until the 2017-18 financial year, when all schools should be funded according to their revised number of planned places. Appendix 1 sets out this detail on a school by school basis.

ELP's	2015-16	2016-17	2017-18	TOTAL
Maintained	960,000	884,167	830,000	
Academy	2,640,000	2,581,667	2,540,000	
TOTAL	3,600,000	3,465,833	3,370,000	
Saving		134,167	95,833	230,000

Resource Bases	2015-16	2016-17	2017-18	TOTAL
Maintained	1,170,000	1,152,500	1,140,000	
Academy	1,500,000	1,293,333	1,260,000	
TOTAL	2,670,000	2,445,833	2,400,000	
Saving		224,167	45,833	270,000

TOTAL (ELP & RB's)	2015-16	2016-17	2017-18	TOTAL
ELP's	3,600,000	3,465,833	3,370,000	
RB's	2,670,000	2,445,833	2,400,000	
TOTAL	6,270,000	5,911,667	5,770,000	
Saving		358,333	141,667	500,000

Proposals

13. Schools Forum is asked to note the content of the report.

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Final Agreed High Needs Places for 2016-17

J:\Democracy\Decision Making\00 Committees\Schools Forum\2016\160114\Copy of Appendix 1 Review of High Needs and Places 14012016.xlsx\Sheet1

ELP Places

a	b	c	d	e	f	g	h	i	j	k	l	m
DfE	School	Status	Planned Place Numbers	Funding for School 2015-16	Actual Place Numbers		Proposed Place No's	Movement	Place No's from	Funded Places in FY 2016-	Funding for School FY 2016-17	Funding for School FY 2017-18
					May	Oct						
4000	Abbeyfield	Maintained	11	110,000	8	8	8	-3	8	9.25	92,500	80,000
4001	Wyvern	Maintained	6	60,000	8	6	8	2	8	7.17	71,667	80,000
4002	Clarendon	Academy	14	140,000	16	11	14	0	14	14.00	140,000	140,000
4006	Trafalgar	Maintained	12	120,000	6	5	6	-6	6	8.50	85,000	60,000
4013	Melksham Oak	Academy	14	140,000	15	17	17	3	17	15.75	157,500	170,000
4064	Malmesbury	Academy	10	100,000	8	12	12	2	12	11.17	111,667	120,000
4066	Corsham	Academy	18	180,000	13	12	13	-5	13	15.08	150,833	130,000
4067	Wootton Bassett	Academy	13	130,000	17	21	21	8	21	17.67	176,667	210,000
4070	Stonehenge	Maintained	17	170,000	15	16	16	-1	16	16.42	164,167	160,000
4071	Avon Valley	Maintained	20	200,000	12	12	12	-8	12	15.33	153,333	120,000
4072	Kingdown	Academy	15	150,000	16	15	15	0	15	15.00	150,000	150,000
4075	John of Gaunt	Academy	22	220,000	25	20	22	0	22	22.00	220,000	220,000
4511	St Edmund's	Academy	10	100,000	9	8	8	-2	8	8.83	88,333	80,000
4537	St Laurence	Academy	14	140,000	14	11	11	-3	11	12.25	122,500	110,000
4610	St Joseph's	Maintained	7	70,000	6	9	9	2	9	8.17	81,667	90,000
5400	St Augustine's	Academy	6	60,000	5	7	7	1	7	6.58	65,833	70,000
5402	Lavington	Academy	8	80,000	9	8	9	1	9	8.58	85,833	90,000
5403	Pewsey Vale	Academy	15	150,000	12	11	12	-3	12	13.25	132,500	120,000
5404	Sheldon	Academy	19	190,000	13	14	14	-5	14	16.08	160,833	140,000
5405	St Johns	Academy	7	70,000	4	5	5	-2	5	5.83	58,333	50,000
5406	John Bentley	Academy	9	90,000	11	7	9	0	9	9.00	90,000	90,000
5408	Bradon Forest	Academy	8	80,000	9	9	9	1	9	8.58	85,833	90,000
5411	Devizes	Academy	16	160,000	16	18	18	2	18	17.17	171,667	180,000
5414	Hardenhuish	Academy	28	280,000	31	27	31	3	31	29.75	297,500	310,000
5415	Matravers	Maintained	23	230,000	24	24	24	1	24	23.58	235,833	240,000
6905	Wellington	Academy	18	180,000	9	8	2	-16	2	8.67	86,667	20,000
6906	Sarum Academy	Academy	0	-	2	5	5	5	5	2.92	29,167	50,000
			360	3,600,000	333	326	337	-23	337	346.58	3,465,833	3,370,000

Resource Base Places

a	b	c	d	e	f	g	h	i	j	k	l	m
DfE	School	Status	Planned Place Numbers	Funding for School 2015-16	Actual Place Numbers		Proposed Place No's	Movement	Place No's from	Funded Places in FY 2016-	Funding for School FY 2016-17	Funding for School FY 2017-18
					May	Oct						
2010	Rivermead	Academy	19	190,000	18	18	19	0	19	19.00	190,000	190,000
2004	Greentrees	Maintained	0	-			5	5	5	2.92	29,167	50,000
2014	Pembroke Park	Academy	3	30,000	2	1	0	-3	0	1.25	12,500	-
2021	The Avenue	Academy	10	100,000	7	10	10	0	10	10.00	100,000	100,000
2028	Corsham Primary	Academy	14	140,000	14	12	9	-5	9	11.08	110,833	90,000
2136	Westbury Infants	Maintained	8	80,000	7	6	7	-1	7	7.42	74,167	70,000
2170	Grove	Maintained	6	60,000	3	2	0	-6	0	2.50	25,000	-
2184	Longleaze	Maintained	4	40,000	3	0	0	-4	0	1.67	16,667	-
2191	Manor Fields	Maintained	14	140,000	15	15	15	1	15	14.58	145,833	150,000
2193	Wansdyke	Academy	20	200,000	20	20	20	0	20	20.00	200,000	200,000
2226	Charter	Maintained	14	140,000	14	14	14	0	14	14.00	140,000	140,000
2025	Marden Vale	Academy	10	100,000	13	15	15	5	15	12.92	129,167	150,000
3117	Malmesbury	Academy	2	20,000	3	2	0	-2	0	0.83	8,333	-
3123	St Mary's Marl	Maintained	6	60,000	7	8	8	2	8	7.17	71,667	80,000
3192	Westbury Juniors	Maintained	6	60,000	5	7	7	1	7	6.58	65,833	70,000
3216	St Peter's Junior	Maintained	10	100,000	8	10	10	0	10	10.00	100,000	100,000
3383	Sarum St Paul's	Maintained	6	60,000	4	6	6	0	6	6.00	60,000	60,000
3407	Woodford Valley	Academy	14	140,000	14	13	14	0	14	14.00	140,000	140,000
3412	Christ The King	Maintained	18	180,000	14	18	18	0	18	18.00	180,000	180,000
3466	The Manor	Academy	16	160,000	14	0	0	-16	0	0.00	-	-
3470	Wilton & Barford	Maintained	8	80,000	10	12	10	2	10	9.17	91,667	100,000
4006	Trafalgar	Maintained	3	30,000	2	1	0	-3	0	1.25	12,500	-
5205	Frogwell Primary	Maintained	14	140,000	16	14	14	0	14	14.00	140,000	140,000
5206	Studley Green	Academy	32	320,000	32	34	34	2	34	33.17	331,667	340,000
5404	Sheldon	Academy	10	100,000	7	5	5	-5	5	7.08	70,833	50,000
			267	2,670,000	252	243	240	-27	240	244.58	2,445,833	2,400,000

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Wiltshire Council

Schools Forum
14th January 2016

Schools Funding Settlement and Budget Proposals for 2016-17

Purpose of report

1. To outline the detail of the schools funding settlement for 2016-17 and to consider the implications for the Wiltshire schools budget.
2. To present budget proposals for 2016-17 for the overall schools budget including cost pressures and savings proposals.

Background

3. The Department for Education (DfE) published the 2016-17 financial settlement for schools on 17th December 2015. The settlement includes details of:
 - The Dedicated Schools Grant
4. A link to the details of the DSG settlement can be found [here](https://www.gov.uk/government/publications/dedicated-schools-grant-dsg-2016-to-2017).
(<https://www.gov.uk/government/publications/dedicated-schools-grant-dsg-2016-to-2017>)
5. No detail has been received in relation to maintenance funding or Devolved Formula Capital.

Main considerations for Schools Forum

The Pupil Premium

6. The pupil premium is to be continued in 2016-17, with the rates protected at:
 - a. Primary pupils who are currently eligible for free school meals or have been eligible in the past 6 years (FSM 'Ever 6') will attract £1,320 and secondary FSM 'Ever 6' pupils will attract £935.
 - b. Looked-after children and eligible pupils who have been adopted from care or leaving care under a special guardianship or child arrangements (formerly known as residence order) will attract a premium of £1,900.
 - c. The service premium will be paid to schools at the rate of £300 per pupil.
7. Based on the January 2016 census data it is estimated that the total pupil premium grant allocated to Wiltshire schools will exceed £14 million in 2016-17.
8. As in previous years it is proposed that the DfE school by school figures (using January 2015 census data) will be used on the funding certificates to give a provisional allocation for each school and these allocations will be updated when the final allocation is received during the financial year.

The HCSS Forward Planning Software will be updated with estimated rates for future years.

Dedicated Schools Grant – Overview

9. A one year settlement has been allocated for 2016-17 and so no indication of future years funding has been received. There has been an announcement about a proposed National Funding Formula, for the 2017-18 financial year. At this stage, the consultation on the proposed National Funding Formula is still awaited but is due out in the spring of 2016. This was announced as part of the Chancellor’s Comprehensive Spending Review in late 2015.
10. It was confirmed in a written ministerial statement issued on the 16th July 2015 that the extra £390 million fairer funding uplift would continue into 2016-17, in effect base lining the £390 million extra funding. This equates to the £5.7 million additional fairer funding awarded to Wiltshire for 2015-16 continuing to be built into the base funding for 2016-17.
11. The DSG has been allocated in three separate blocks for 2016-17, the blocks are not ring fenced. The total provisional DSG allocation for Wiltshire is £311.246 million broken down as follows:

DSG Funding 2016-17	£m
Schools Block – final allocation based on October 2015 school census	260.156
Early Years Block – provisional allocation based on January 2015 census	18.988
High Needs Block – allocation based on baseline 2015-16 data agreed with EFA (see para’s 14-18 below)	32.014
Addition non-block funding (NQT)	0.088
Total	311.246

12. The settlement appears to represent a cash decrease of £1.751m compared with 2015-16 however there are a number of upward and downward adjustments which are detailed within the body of this report.
13. The Early Years block will be updated after the start of the financial year for the January 2016 census and again after the end of the financial year for the January 2017 census.
14. The final value of the High Needs Block will be confirmed in March 2016. Values have been adjusted for placements in non-maintained special schools (NMSS) and for final numbers of post-16 placements, funded directly by the EFA.
15. The manner in which the DSG is reported this year has been amended, in particular the High Needs Block and therefore there needs to be some caution exercised when making comparisons. The EFA are reporting the net DSG High Needs allocation, after taking account of all of the places and funding which they will pay directly to institutions in 2016-17.

16. The true DSG High Needs Block before the deductions for their direct funding is £38.131million. If this were reflected in the table for comparative purposes, the funding position would appear as below.

	16-17 £m	15-16 £m	14-15 £m
Schools Block – final allocation based on October 2015 school census	260.156	256.535	249.094
Early Years Block – provisional allocation based on January 2015 census	18.988	18.988	16.027
High Needs Block – allocation based on baseline 2015-16 data agreed with EFA (see para 17 below)	38.131	37.385	37.120
Addition non-block funding (NQT)	0.088	0.089	3.349
Total	317.275	312.997	302.241

17. The breakdown of the final High Needs Block allocation awarded to the LA is set out below;

2015-16 Final Block Allocation		37.385
Exceptions Process - extra places summer term	0.063	
Change from residency to location basis – NMSS	-0.140	-0.077
Indicative High Needs Block 2016-17		37.308
Additional High Needs Top-Up Funding (para. 39)		0.823
High Needs Block prior to deductions		38.131
Recoupment Academies - Post-16 SEN places	-3.786	
Special Academies – Pre and Post-16 places	-1.970	
Free Schools – Pre-16 places	-0.004	
Maintained Special Schools – Post-16 places	-0.350	
Maintained Schools – Post-16 places	-0.006	-6.116
High Needs Block after deductions		32.014

18. Additional funding for the High Needs Top Up funding of £0.823m has been awarded and included in the table above.

19. More detail is provided on each of these items outlined above later in this report.

20. A minimum funding guarantee (MFG) of 1.5% is to be applied to the delegated schools budget meaning that no school has a reduction in funding of more than 1.5% per pupil before any pupil premium is added. Schools Forum has previously agreed that the cost of the MFG will be met through limiting the gains for those schools who would receive increases in funding through the new funding model. Limits to gains are also applied on a per pupil basis.

Early Years Block

21. The Early Years block largely funds the Early Years Single Funding Formula (EYSFF) which allocates funding to early years providers, including nursery classes within maintained schools and academies, for the provision of the free entitlement for 3 and 4 year olds. The provisional allocation of funding is based on the January 2015 census and therefore includes no funding for increased take up, or demographic growth. The DSG settlement will be adjusted once the January 2016 early years census data has been verified.
22. There are risks associated with the Early Years estimate as it is difficult to accurately project the take up of places based on the January census. It is recommended that any increase in DSG arising from the January early year's census is allocated to the EYSFF budget to support increases in population and take up of places.

Early Years Block – Agreed at Schools Forum March 2015

3&4 Year Old Funding

23. At Schools Forum's meeting in March 2015, changes to the funding values were proposed and agreed to the EYSFF for 3 & 4 year olds. The DfE had made it clear that it is for LAs to agree an hourly rate with providers.
24. The current levels of funding were unaffordable and therefore it was agreed to have a transition arrangement whereby the rates were moved towards a single funding rate. The agreement was that the prevailing 2014-15 rates would be reduced from September 2015 and then reduced to a single rate from April 2016. The rate changes are detailed below;

	1st April 15	1st Sept 15	1st April 16
Childminder	£6.50	£5.16	£3.81
Private	£3.71	£3.76	£3.81
Voluntary	£3.71	£3.76	£3.81
Independent	£3.71	£3.76	£3.81
Maintained	£4.04	£3.90	£3.81

2 Year Old Funding

25. In 2013-14 and 2014-15 Wiltshire had funded 2 year old places at an hourly rate of £5.43. The rate was set at a level higher than the funding allocation on the basis that there would be approximately 92% take up of places.
26. In October 2014, the DfE published funding rates for the early education entitlement for 2 year olds and the rate for Wiltshire has been confirmed as £4.97 per hour.

27. From April 2015 the funding of places moved to a full participation model meaning that LAs are funded on actual take up of places and Wiltshire implemented the rate of £4.97 per hour.
28. In 2016-17 initial funding for the two-year-old programme will be allocated to local authorities in June 2016 using the January 2016 census data. To make sure local authorities are accurately funded as the take-up of the entitlement increases over the year, the DfE will use a mid-year second data count in the autumn term to adjust funding in-year to reflect any significant increases in take-up of the entitlement.

Schools Block

29. The schools block has been set at £260.156 million which is an increase of £3.621m on the 2015-16 funding level. The increase is accounted for by the pupil growth of 841 pupils in Wiltshire from;
 - 2015-16 – 59,626 pupils
 - 2016-17 – 60,467 pupils
30. The removal of schools from the CRC scheme is intended to be cost neutral to the Exchequer. A deduction has therefore been made from the DSG for 2016-17 to compensate the Exchequer for the loss of revenue resulting from local authorities no longer needing to meet the costs of purchasing carbon credits for schools under the scheme.
31. Modelling work is now being undertaken to calculate individual school budgets in order to meet the EFA deadline of 21st January 2016 and an update will be brought to the Schools Forum meeting. Currently the following assumptions are being made:
 - a. Age Weighted Pupil Unit (AWPU) rates reflect the increases from the Fairer Schools Funding, as previously agreed with Schools Forum;
 - b. Lump sum allocations are unchanged at £85,000 for primary schools and £175,000 for secondary schools;
 - c. Total funding allocations for English as an Additional Language (EAL), Prior Attainment and Deprivation remain unchanged and funding rates are scaled accordingly;
 - d. Costs of the MFG are met through limiting the increases to schools gaining from the formulaic changes.
32. Initial modelling indicates that the schools budget is affordable with these assumptions. However the numbers of pupils eligible for free school meals, and pupils with English as an additional language, have increased and so unit rates for these pupils have reduced. The pupil numbers with low attainment have fallen so unit rates for these pupils have increased. An alternative approach would be to leave unit rates for EAL, FSM unchanged but this would need to be funded through reductions in the AWPU.

33. Further detail of the overall delegated budget will be discussed at the meeting and Schools Forum will be asked to confirm the assumptions to be applied within the calculation of the delegated budget.

Schools Block – Growth Fund

34. At the December 2013 meeting Schools Forum confirmed the criteria for the Pupil Growth Fund which has been held centrally since April 2013. Wiltshire's Growth Fund has been confirmed as compliant with the EFA and no changes to it are being proposed. A separate report relating to the Growth Fund will be presented to Schools Forum.

Schools Block – Falling Rolls Fund

35. Since 2014-15, the regulations allow for local authorities to top slice DSG to provide a targeted fund to support schools with falling rolls if they meet certain criteria. The requirement for any school accessing funding to be judged Good or Outstanding is mandatory but authorities may agree other criteria to allocate funding to schools within their area.
36. Schools Forum previously considered the merits of a Falling Rolls Fund in January 2014 and concluded that it would not implement a Falling Rolls Fund to support schools with a falling roll and consequently opted not to develop a Falling Rolls Policy.

High Needs Block

37. The High Needs Block covers expenditure on provision for pupils and students with high needs from ages 0 to 25 and support services for pupils covering early year's provision to FE college provision. The responsibility to fund provision for students in FE colleges and Independent Specialist Providers (ISPs) up to the age of 25 years is a new responsibility for local authorities and funding was transferred in to DSG for 2013-14 to support this, based on previous learner numbers. The high needs block also covers the cost of alternative provision and hospital education services.
38. The allocation of the high needs block is based on agreed planned place numbers and historical spend rather than on specific school census data. The final High Needs Block allocations will be notified in March 2016.
39. The final funding arrangement announced for 2016-17 confirmed the provision of an additional £92.5 million for the DSG High Needs Block. Wiltshire's share of the £92.5 million is £0.823 million, as detailed in the table at paragraph 17. The additional funding is in recognition of the significant cost pressures within the High Needs sector nationally. This is very welcome funding but will not address all of the funding issues in the High Needs block.
40. In line with Schools Forum's principle's, it is proposed that the additional funding will be allocated wholly to the High Needs Block.

Wiltshire High Needs Provision

41. A basket of cost savings proposals was presented to Schools Forum in March 2015, which were approved for implementation in the 2015-16 financial year. The most contentious of these proposals was the recoument of place funding for unfilled high needs places in both Resource bases and ELP provisions.

42. Members of the SFWG and Schools Forum are familiar with the journey for this recouplement and have been ultimately very supportive throughout the process. During the 2015-16 year, the EFA have enabled authorities to revise the numbers of High Needs places for the 2016-17 academic year. This will ensure that Wiltshire retains the majority of its High Needs places, whilst minimising the number of unfilled planned places.
43. As in 2015-16 it is proposed that the budget for High Needs be set at the level allocated within the funding settlement.
44. Given the current cost pressures within the high needs block, further modelling and work is being carried out, looking at all areas of the service. There is an underlying assumption that changes and services must be managed within the existing budget level.

Overall Schools Budget

45. It is proposed that the overall schools budget be set at the level of the provisional funding allocation of £311.246 million, with further adjustments to be made once notification is received of any further adjustment to the Early Years and High Needs blocks.

DSG Reserve

46. A reserve of £1.490 million is currently held arising from underspends in previous years.

<u>DSG Reserve 2015-16</u>	
Balance b/f from 14-15	1.490
Commitments 15-16 (TTO)	(0.100)
Projected DSG Reserve	1.390

47. No assumptions have yet been made about whether this reserve should be utilised in any way to support the 2016-17 budget or to support additional, one off, developments. Balances can be used to support expenditure within all blocks or any of the blocks.

Proposal

48. It is proposed that:
- a. Any increase in DSG arising from the January early years census is allocated to the EYSFF budget to support increases in population and take up of places;
 - b. There should be no change to the hourly rate for 2 year old places;
 - c. The previously agreed hourly rate for 3 & 4 year olds be implemented from April 2016;
 - d. Agreement regarding the assumptions to be used in calculating the delegated budget, detailed in para. 31;
 - e. The extra £0.823m allocated for the High Needs Block be retained within the High Needs Block;
 - f. That the overall schools budget is set at £311.246 million.

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Wiltshire Council

Schools Forum 14th January 2016

Budget Update 2016-17 – Schools Block

Purpose of report

1. To update the Schools Forum on developments and issues for the Schools DSG block for 2016-17.

Main considerations for School Forum

Schools Block DSG Settlement 2016-17 - Update

2. In 2015-16, the DfE had announced changes to the schools block under its Fairer Schools Funding proposals. Under these proposals an additional £390m was allocated nationally to increase funding for the lowest funded authorities in terms of the Schools Block Unit of Funding (SBUF).
3. The final allocations meant that Wiltshire benefitted from this increase and successfully received an additional £5.721million, and moved from being the 6th worse funded authority in the country to the 7th worst funded authority (out of 151 authorities). In July 2015, it was confirmed in a Ministerial Statement that this funding would continue and in effect form part of the baseline for Wiltshire's DSG funding.
4. In December 2015, the DfE announced final SBUF values for 2016-17. For Wiltshire this has been confirmed as £4,302.45 per pupil, an increase of £0.04 from 2015-16. This figure is the net figure after applying the deduction for CRC savings in 2016-17. Nationally, a deduction of £51m is deducted from the total DSG for this purpose. In 2016-17 this deduction will be applied on a per pupil basis and £7.51 will be deducted from the Wiltshire per pupil amount, as in 2015-16.

DSG Final Settlement for 2016-17 – Schools Block

5. The DfE have now announced the final DSG settlement for Wiltshire for 2016-17 as;

2016-17 Schools Block Unit of Funding (SBUF)	£4,302.45
2016-17 Pupil Numbers (Oct 2015 census)	60,467
2016-17 Total Schools Block	£260.156m

6. The derivation of the pupil numbers for Wiltshire are all based upon the October 2015 census and a breakdown is provided below.

Pupils from October 2015 Census				
	Maintained Primaries	Maintained Secondaries	Academies	TOTAL
Pupils aged 4 to 16 at 31st August 2015 (headcount) in YG R-6	27,709.5	0.0	9,335	37,044.5
Pupils aged 4 to 16 at 31st August 2015 (headcount) in YG 7-11		3,789	20,173	23,962.0
Places in SEN units and Resourced Provision (from High Needs returns)				(625.0)
Reception Uplift: Increase (where relevant) of pupils aged 4 at 31 August 2014 (October 2014) and 31st August 2014 (January 2015) (headcount) in YG R only				85.5
TOTAL FUNDED PLACES	27,709.5	3,789	29,508	60,467
15-16 Places for comparison	29,379.5	5,789	24,984.5	

7. In order to calculate the total number of funded pupils, the number of places in the SEN units and Resource Base provision, need to be removed from the overall total.
8. The movement in funded places is an additional 841 pupils compared to the same period last year.

Proposals

9. That Schools Forum note the final proposed value of the SBUF for 2016-17 and the AWPU values. Also to note the final DSG settlement and the revised pupil numbers for 2016-17.

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Dedicated schools grant: 2016-17 allocations		2016-17 DSG allocations																	
		2016-17 DSG schools block					2016-17 DSG provisional early years block **							2016-17 DSG high needs block			2016-17 DSG non block additions	2016-17 TOTAL DSG ALLOCATIONS (£million)*	
		2016-17 schools block unit of funding (SBUF) (£)	2016-17 schools pupil numbers (headcount) *	2016-17 schools block (£million)	2016-17 NRA cash adjustment (£million)	2016-17 total schools block (£million)	2016-17 3 & 4 year old unit of funding (EYBUF) (£)	2016-17 3 & 4 year old pupil numbers (FTE) **	2016-17 3 & 4 year old funding (£million) **	2016-17 2yo annual rates (£)	2016-17 2 year old pupil numbers (FTE) **	2016-17 2 year old funding (£million) **	2016-17 indicative early years pupil premium (£million)	2016-17 total provisional early years block (£million) **	2016-17 high needs block before deductions (£million) †	2016-17 deductions to HN block for direct funding by EFA (£million) ††	2016-17 high needs block after deductions (£million) †††		2016-17 funding for induction for newly qualified teachers (£million)
865	Wiltshire	4,302.45	60,467	260.156	-	260.156	3,645.92	4,426	16.137	4,721.50	554	2.616	0.235	18.988	38.131	6.116	32.014	0.088	311.246

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Wiltshire Council

School's Forum
14th January 2016

“A fair deal for Wiltshire’s Special Schools?”

Purpose of the Report

1. To introduce a letter received from the Headteacher of Rowdeford Special School, attached as Appendix 1.

Background

2. A letter was received, for consideration at the January Schools Funding Working Group, relating to the issue of the award of fairer funding monies received in 2015-16 and built into Wiltshire’s baseline funding for 2016-17.
3. In 2015-16, the DfE had announced changes to the schools block under its Fairer Schools Funding proposals. Under these proposals an additional £390m was allocated nationally to increase funding for the lowest funded authorities in terms of the Schools Block Unit of Funding (SBUF).
4. The final allocations meant that Wiltshire benefitted from this increase and successfully received an additional £5.721million, and moved from being the 6th worst funded authority in the country to the 7th worst funded authority (out of 151 authorities). In July 2015, it was confirmed in a Ministerial Statement that this funding would continue and in effect form part of the SBUF baseline for Wiltshire’s DSG funding.
5. Schools Forum agreed to build this additional funding into the AWPU rates for the mainstream schools in 2015-16, whilst retaining the Key Stage differentials. None of the extra funding was awarded to Special Schools.
6. The contents of the letter were discussed at the Schools Funding Working group on the 6th January 2016 and it was recommended that this be presented as an agenda item at Schools Forum.

Proposal

7. It is proposed that Schools Forum note the contents of the letter and discuss and respond to the concerns raised.

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Headteacher - Ingrid Sidmouth

November 2015

A fair deal for Wiltshire's Special Schools?

FAO: School Funding Working Group

I have heard 'through the grapevine' that Wiltshire Council is, once again, highly likely to be awarded a further £5.7m in additional funding for the financial year 2016-2017.

As you know, School Forum made the decision to exclude the special schools in the distribution of additional funds received in the current financial year – a decision which was unfair because special schools are faced with identical challenges as the mainstream schools (i.e. rises in National Insurance and pension contributions) – arguably even more so because the levels of staffing in specialist settings is high by comparison.

I am therefore writing to **urge this group to lobby School's Forum** to carefully consider a **fairer mechanism** for distributing the additional funds anticipated in 2016-2017. A simple analysis of staffing costs across the county's schools would seem an appropriate method – indeed, if this approach had been adopted in the current financial year, the 6 special schools would have benefitted from approximately £250,000 in additional funding. If one takes into account that there are roughly 60,000 pupils in Wiltshire, this would equate to a **reduction of just £4.00 per pupil** in each of the mainstream schools.

Indeed, as the special schools were 'forgotten' in 15-16, (so, arguably, should be entitled to £500,000 across the two financial years) **a reduction of £8 per pupil in the mainstreams schools for 2016-17 seems not an unreasonable proposal to put forward.**

The current position in the High Needs Block is untenable – a fact which is indisputable and which, although I cannot speak for the other special schools, I can categorically state is already having a negative impact on the level and standard of provision we are able to offer at Rowdeford.

Whilst there is a glimmer of hope on the horizon (the 2017/18 School Funding Reforms will lead to a formulaic approach to funding), special schools cannot be expected to continue into another financial year simply relying on the base funding and variable top-up income as calculated under the current arrangements and must, at the very least, be treated equally in the county where additional funding distribution is concerned. Failure to do so will mean nearly all the specialist provision will be in a deficit position by April 2017.

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Headteacher - Ingrid Sidmouth

I look forward to your response,

Yours sincerely

Ingrid Sidmouth
Headteacher

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Wiltshire Council

School's Forum
14th January 2016

Allocation of Funding for Pupil Growth 2016-17

Purpose of the Report

1. To seek agreement on the methodology for allocating funding for pupil growth from the centrally retained growth fund in 2016-17.
2. To seek agreement on the amount of funding to be allocated for pupil growth.

Background

3. Wiltshire currently operates a growth fund and Schools Forum agreed to a number of criteria for the allocation of funding for pupil growth in the 2015-16 financial year. A revision to the scheme was made for 2014-15, due to the previous Wiltshire scheme becoming non-compliant. The element of the scheme that required amendment was the factor for in year pupil growth, as funding can only be provided for growth due to basic need or to meet infant class size regulations. As a result of this, the Wiltshire scheme was revised to only allocate in year growth funding, where it is required to meet infant class size regulations.

Main Considerations

4. Funding for significant pupil growth can be retained centrally as part of the schools contingency before the formula is calculated. This can include funding to be allocated for additional classes arising from Basic Need or additional classes needed as a consequence of infant class size regulations. The requirements are that:
 - a) the growth fund can be used only for the purposes of supporting growth in pre-16 pupil numbers to meet basic need and to support additional classes needed to meet the infant class size regulation
 - b) the fund must be used on the same basis for the benefit of both maintained schools and recouperment academies
 - c) any funds remaining at the end of the financial year must be added to the following year's DSG and reallocated to maintained schools and academies through the local formula
 - d) local authorities will be required to produce criteria on which any growth funding is to be allocated. These should provide a transparent and consistent basis (with differences permitted between phases) for the allocation of all growth funding. The criteria should both set out the

circumstances in which a payment could be made and provide a basis for calculating the sum to be paid

- e) local authorities will need to propose the criteria to the Schools Forum and gain its agreement before growth funding is allocated. The local authority will also need to consult the Schools Forum on the total sum to be top-sliced from each phase and must regularly update the Schools Forum on the use of the funding.

Historical Position

- 5. At the Schools Forum meeting on the 16th January 2014, it was agreed that a budget of £0.848m should be retained centrally for the purpose of funding pupil growth in the financial year 2014-15.
- 6. For 2015-16, Schools Forum agreed that the budget should be set to a maximum of £1m.

Affordability

- 7. During 2015-16, there were two new primary schools which opened in 2014 in Wiltshire, Castle Mead Primary and Wellington Academy Primary.
- 8. The Basic Need Class Expansion for additional classes is still to be confirmed with colleagues in the School places team.
- 9. The Infant Class Size increases were estimated, based upon the last two years, as being payable for twenty-five classes, equating to £455,250. The actual position for 2015-16 is still to be confirmed but based upon the confirmation of the wording for the policy, the current budget should be sufficient.
- 10. The total Growth Fund requirement for 2015-16 is therefore anticipated to come within the budget.
- 11. In addition, the local authority has submitted a bid to support the schools affected by the MOD re-basing and the results of the bid will not be known until the end of January 2016. The success of this bid will impact upon Wiltshire's Growth Fund.
- 12. The proposed criteria for funding pupil growth within the local Wiltshire funding formula in 2016-17 are as follows:

Proposed Criteria

New School Allowance (unchanged from 13-14, 14-15 & 15-16):

- 13. Schools receive funding in advance of pupils arriving in the school, based on the result of the pupil teacher ratio rounded up to the nearest next whole number. The PTRs used are 26.5:1 for KS1 & 27.5:1 for KS2 + 1.1. The topped up element to the next whole number is arrived at by multiplying the

result by the salary of a teacher on the top point of the teacher's main scale + on-costs. This element will apply until the first year group has left the school or until the school is full.

14. In addition the costs of a head teacher and 10 hours admin support will be available one "old" term before opening. 55% of the Basic Flat Rate will be available two "old" terms before opening. In the first year of opening the school will also receive 34% of the Basic Flat Rate, 17% in the second & 8.5% in the third year after opening.
15. New schools may also receive an estimate of the new pupil intake for the forthcoming academic year. This approach will be in place for the number of years equal to the number of year groups at the school. The initial estimate may be changed at a later date (but no later than the end of Term 6) to more accurately reflect the likely new intake, with the agreement of the school.

Class Expansion for Basic Need (unchanged from 13-14, 14-15 & 15-16):

16. Where a school is expanded to provide additional classes to meet a basic need for places identified by the LA, from the month of opening for the remainder of the financial year only the school will receive $\frac{7}{12}$ ths x 30 x relevant AWPU for each additional class. Where a full class may not be needed then the school would receive $\frac{7}{12}$ ths x estimate of increased September intake x relevant AWPU. The definition of "expanded" is that a building project or addition of a mobile classroom has taken place.

Infant Class Size Increases:

17. This is payable to a Primary School with infant classes which is required to set up an additional class in the Autumn term as required by the infant class size regulations, and the school cannot accommodate all of its additional Reception and Key Stage 1 pupils in classes of 30 or less, i.e. the total number of pupils in the 3 year groups exceeds a multiple of 30. If the total increase in NOR between the two October census dates is greater than 13 and necessitates that an extra class would be required, then additional funding is allocated per additional class.

18. Schools Forum needs to approve the above criteria for application in 2016-17.

Proposal

19. It is proposed that:
 - a) Schools Forum approve the criteria for allocating pupil Growth Fund in 2016-17.
 - b) Schools Forum agree that the budget for the Growth Fund is retained at a maximum of £1m for 2016-17

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