

AGENDA

Meeting: Schools Forum
Place: Main Hall - St John's Parish Centre, 2 Wingfield Road, Trowbridge, BA14 9EA
Date: Thursday 14 March 2013
Time: 1.30 pm

Briefing Arrangements:

Briefing will be held at 11.30 am in the Main Hall – St John's Parish Centre and will focus on the Review of Schools Funding consultation

Please direct any enquiries on this Agenda to Kirsty Butcher, of Democratic Services, County Hall, Bythesea Road, Trowbridge, direct line 01225 713 948 or email kirsty.butcher@wiltshire.gov.uk

Press enquiries to Communications on direct lines (01225)713114/713115.

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

Membership:	Representing:
Mr N Baker	PHF, Christ Church CE Primary School
Dr Peter Biggs	WGA, Secondary School Governor Representative
Mrs Julia Bird	PHF, Southwick Primary School
Mr Andy Bridewell	PHF, Ludgershall Castle Primary School
Mr Steve Clark	Maintained Secondary - Melksham Oak Community School
Mrs A Ferries	WGA, St Patrick's Catholic Primary School
Mrs Jane Franchi	Salisbury Diocesan Board of Education
Mr Tim Gilson	Academy, Malmesbury School
Jan Hatherell	Academy, Hardenhuish School
Mr John Hawkins	Teacher representative
Mrs Sue Jiggins	WGA - Primary Governor Representative
Mr Michael Keeling	Early Years Representative
Rev Alice Kemp	WGA, SEN Governor Representative
Dr Tina Pagett	14-19 Group Representative
Mr J Proctor	Early Years Representative (PVI)
Ms I Sidmouth	SEN Sector, Rowdeford School
Mr Martin Watson	Academy, Lavington School
Mrs C Williamson	PHF, Mere Primary School

AGENDA

PART I

Items to be considered whilst the meeting is open to the public

1 **Apologies and Changes of Membership**

2 **Minutes of the previous Meeting** (*Pages 1 - 6*)

To approve and sign as a correct record the minutes of the meeting held on 24 January 2013. (copy attached)

3 **Declaration of Interests**

To receive any declarations of disclosable interests or dispensations granted by the Standards Committee.

4 **Chairman's Announcements**

5 **Children and Young People's Trust Board Update**

To receive a verbal update from the Service Director for Commissioning and Performance, Department for Children and Education.

6 **Budget Monitoring**

To receive budget monitoring information against the Dedicated Schools Grant (DSG) for the financial year 2012/13 as at 31 January 2013. (report to follow)

7 **Reports from Working Groups** (*Pages 7 - 14*)

To receive minutes, reports and/or verbal updates from the following working groups:

- School Funding Working Group
- SEN Working Group
- Schools Services Working Group (*verbal update*)

8 **Review of School Funding Arrangements 2013-14** (*Pages 15 - 38*)

To consider the attached consultation document issued by the DfE to review the new school funding arrangements. (report to follow)

9 **Schools Budgets 2013-14 - Update**

To receive an update from Liz Williams, Head of Finance, on final school budgets for 2013-14. (report to follow)

10 **Expectations for SEND Green Paper Pathfinders during the Extension Period (April 2013 to September 2014)** (*Pages 39 - 40*)

To receive a briefing from Julia Cramp, Service Director – Commissioning and Performance, on the key expectations for the extension of the SEND Green Paper Pathfinder.

11 **Controls on Surplus Balances scheme - outcome of consultation** (*Pages 41 - 44*)

To receive an update from Jane Ralph on the results of the consultation on a revision to the Wiltshire scheme for funding schools in respect of the control of the use of surplus balances.

12 **Free School Meal Pooling Scheme** (*Pages 45 - 48*)

To receive an update from Liz Williams, Head of Finance, on the Free School Meals pooling scheme.

13 **Confirmation of dates for future meetings**

To confirm the dates of future meetings, as follows:

27 June 2013

3 October 2013

12 December 2013

23 January 2014

13 March 2014

14 **Urgent Items**

Any other items of business, which the Chairman agrees to consider as a matter of urgency.

PART II

Item(s) during consideration of which it is recommended that the public should be excluded because of the likelihood that exempt information would be disclosed

None

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SCHOOLS FORUM

DRAFT MINUTES OF THE SCHOOLS FORUM MEETING HELD ON 24 JANUARY 2013 AT COMMITTEE ROOM - MELKSHAM TOWN HALL, MARKET PLACE, MELKSHAM, SN12 6ES.

Present:

Mr N Baker (Chairman), Dr Peter Biggs, Mrs Julia Bird, Mr Andy Bridewell, Findley-Cobb (Substitute), Jan Hatherell, Mr J Hawkins, Dr Tina Pagett, Mr J Proctor, Ms I Sidmouth and Mr Martin Watson (Vice-Chair)

Also Present:

Cllr Bill Moss

1 Apologies and Changes of Membership

Apologies for absence were received from Mr Steve Clark, Mrs A Ferries, Mrs Jane Franchi, Mr Tim Gilson, Cllr Lionel Grundy, Mrs Sue Jiggins, Mr Michael Keeling, Revd Alice Kemp, Mrs Rosheen Ryan and Mrs C Williamson.

2 Minutes of the previous Meeting

Resolved:

To approve and sign as a correct record the minutes of the meeting held on 6 December 2012.

Matters arising:

Min. No. 48 – Minutes of Previous Meeting – MFG Exceptions

Liz Williams reported that after the last meeting, she had contacted the EFA about their refusal of the appeal on the recommendations regarding the special staff costs and service safety net within the Minimum Funding Guarantee Exceptions 2012/13, however the decision remained unchanged. She advised that we would need to reapply each year and there was a possibility that the Service School Protection factor exception could be approved if it could be demonstrated that pupil numbers had increased beyond the numbers being funded through the protection.

Min. No. 54 – Young People’s Support Service Update

Liz Williams explained that since the last Forum meeting she had attended a meeting with representatives from the Passenger Transport Unit to discuss the issues associated with home to school transport. It was confirmed that the budget for the cost of transport to alternative provision during the school day had been included in the sum devolved to schools. However home to school transport for pupils should continue to be met through the LA home to school transport budget; any further issues/updates would be reported to WASSH in due course.

3 Declaration of Interests

There were no declarations of interest.

4 Chairman's Announcements

There were no Chairman's announcements.

5 Children and Young People's Trust Board Update

The Forum received a verbal update from the Service Director, Commissioning and Performance.

She explained that Wiltshire had been chosen to be a Pathfinder following the publication of the SEN and Disability Green Paper *Support and Aspiration: A new approach to special educational needs and disability*. Draft legislation had now been published bringing in the use of Education, Health and Care Plans (which would replace statements of SEN) and changes were expected to be implemented from April 2014. Alongside these changes, the Pathfinder was continuing to focus on promoting Personal Budgets and putting together Wiltshire's Local Service Officer for parents and carers of children with SEN and disabilities.

Further work was taking place on the Complex Families Project (Wiltshire's response to the Government's Troubled Families initiative). This was a payment by results project and the Wiltshire Families First service provided by Action for Children was a key element of this project (accessed through the Gateway Panel). Alongside this work, there had also been a revision of the Multi Agency Threshold document involving payment by results and also a revision of the Multi Agency Threshold document, both of which it would be helpful to discuss at both PHF and WASSH.

A Safeguarding Peer Review would be taking place during the week commencing 28 March which would be following the inspection of Safeguarding in Children's Services in March 2012. The Peer Review provided a check on progress on actions needed to improve safeguarding practice and improve outcomes for children and young people.

6 Budget Monitoring

The Forum received a report by Carolyn Godfrey, Corporate Director, which set out budget monitoring information against the Dedicated Schools Grant (DSG) for the financial year 2012-13 as at 31 December 2012.

It was noted that at present there was an underspend of £352,000 against the overall schools budget.

Resolved:

To note the contents of the report.

7 Reports from Working Groups

School Funding Working Group

The report of the School Funding Working Group, together with the minutes of the Group's meeting held on 11 January 2013, were received and noted.

SEN Working Group

The report of the SEN Working Group, together with the minutes of the Group's meeting held on 16 January 2013, were received.

Resolved:

- (1) To agree that for pupils from a special school, resource base or ELP, the contribution required from the school towards the medical needs service should be the equivalent of 80% of the per pupil rate allocated to mainstream schools for the age of the pupil.**
- (2) To note the recommendations of the Group in respect of planned places and top up values for high needs provision, which would be considered as part of the overall consideration of the 2013-14 budget.**

Schools Services Working Group

Simon Burke gave a verbal update on the work of this Group. He explained that arrangements were being made for a broadband connection to be provided at a significantly lower cost than that currently being supplied. The Council was moving away from a single contract to individual arrangements being made per site.

8 Supply Pool School Insurance Scheme

Consideration was given to a report by Carolyn Godfrey, Corporate Director, about the current position within the Supply Pool School Insurance Scheme and proposals for development of the scheme.

Resolved:

- (1) To agree the following proposals:-
 - (i) To offer 2013/14 Premiums at a 0% increase on 2012/13's prices.
 - (ii) To continue cashback payments.
 - (iii) To start investigating an extension of the scheme to cover maternity in future years.
- (2) To agree that the basis of the cashback calculation for 2012/13 should be enhanced as in 2011/12.

9 Free School Meals Pooling Scheme

The Forum considered a report by Carolyn Godfrey, Corporate Director, providing an update on the balance on the free school meals pool and setting out proposals on how to calculate the premiums for the next year.

Resolved:

- (1) To agree that the calculations for Cashback and year end predictions be prepared for consideration at the next Schools Forum meeting due to be held on Thursday 14 March 2013.
- (2) To base the premium for the 2013/14 scheme on the number of FSM pupils in the October 2012 census multiplied by the unit rate applied in 2012/13.

10 Schools Funding Formula and Schools Budget proposals 2013/14

Consideration was given to a report by Carolyn Godfrey, Corporate Director, which:-

- (1) outlined the detail of the schools funding settlement for 2013-14 and requesting consideration of the implications for the Wiltshire schools budget,
- (2) set out the estimate of the Dedicated Schools Grant (DSG) for 2013-14 and
- (3) presented budget proposals for 2013-14 for the overall schools budget including cost pressures and savings proposals.

After considering in detail the contents of the report and further advice provided by Liz Williams, Head of Finance,

Resolved:

- (1) To allocate any increase in DSG arising from the January early years census to the EYSFF budget to support increases in population and take up of places.**
- (2) To agree an hourly rate for 2 year old places at £5.43 plus an additional 25p per hour as a start up rate per pupil for 2013-14, to be reviewed on an annual basis.**
- (3) To roll forward any underspend against the funding allocation for 2 year old places to support the continuation of the hourly rate in future years, subject to an annual review.**
- (4) To reject the option to reduce the Lump Sum to achieve savings in the schools budget as the level of lump sum had been agreed after consultation with schools, and because schools were not protected against changes to the lump sum through the minimum funding guarantee.**
- (5) To request Liz Williams to prepare a fresh model showing a reduction of between 0.3% and 0.5% per pupil rate to be circulated electronically within a week to members of the Schools Forum for approval and then subsequently submitted to the Education Funding Agency (EFA).**
- (6) To approve the required funding for pupil growth as set out in paragraph 44 of the report.**
- (7) To approve the following top-up rates for high needs provision:-**
 - (i) Top-up rates for special schools based on existing banding models but with a 2% turbulence element added across all top ups.**
 - (ii) Top-up rates for resource bases based on existing banding rates, with an additional A+ band for ASD/SLCN centres but including a 10% increase to complex needs centre rates.**
- (8) To consider at the next meeting proposals for an amount from the DSG reserve to be identified to support the Local Authority in working with more vulnerable schools following the implementation of the new formula.**
- (9) To recommend to Council that the overall schools budget be set at £302.184 million with possible adjustment for any utilisation of the DSG reserve and that the impact of this reduction in budget on schools be shown.**

11 **Confirmation of dates for future meetings**

Resolved:

To confirm the dates of future meetings as follows:-

14 March 2013
27 June 2013
3 October 2013
12 December 2013

12 Urgent Items

There were no urgent items.

(Duration of meeting: 1.30 - 4.30 pm)

The Officer who has produced these minutes is Roger Bishton, of Democratic Services, direct line 01225 713 948, e-mail roger.bishton@Wiltshire.gov.uk

Press enquiries to Communications, direct line (01225) 713114/713115

Wiltshire Council

Schools Forum
14th March 2013

Report from the School Funding Working Group

Purpose of report

1. To report on the meeting of the School Funding Working Group held on 25th February 2013.

Main considerations for School Forum

2. The draft minutes of the meeting are attached at Appendix 1.
3. The Group agreed the following recommendations to be made to Schools Forum to be considered at the meeting on 14th March 2013.

4. Controls on Surplus Balances Scheme

The School Funding Working Group considered a report outlining the results of the consultation with schools on proposed changes to the controls on surplus balances scheme.

It was recommended that the proposal to amend the funding scheme to withdraw the control mechanism on surplus balances with effect from the 2013/14 financial year be supported.

5. Review of 2013-14 School Funding Arrangements

The group considered the DfE consultation document: Review of 2013-14 School Funding Arrangements and requested that the following information be made available to Schools Forum to assist in the consideration of the document and Schools Forum's response:

1. Benchmarking information on the sizes of schools in similar rural counties;
2. Per pupil funding for different sizes of schools within Wiltshire under the old and new formula, pre and post MFG
3. Data on the nearest second school for pupils attending small rural schools.

6. Free School Meals Pooling Scheme

The group considered the report outlining the current financial position within the FSM Pooling Scheme.

It was recommended that no cash back be distributed to schools in 2012-13.

Proposals

7. That Schools Forum note the minutes of the School Funding Working Group and the recommendations outlined above.

Carolyn Godfrey
Corporate Director

Report author: Liz Williams, Head of Finance
01225 713675
Elizabeth.williams@wiltshire.gov.uk

Schools Forum School Funding Working Group

25 February 2013, 8:30am, Stoate Room, Shurnhold, Melksham

Minutes

Present: Liz Williams, Martin Watson, Steve Clark, Neil Baker, John Hawkins

Apologies: Catriona Williamson, Andy Bridewell, Phil Cook, Tim Gilson

1	<p>Minutes from Previous Meeting</p> <p>The minutes of the previous meeting had been considered by Schools Forum and there were no matters arising.</p>	
2	<p>Controls on Surplus Balances – outcome of consultation with schools</p> <p>EW presented a report detailing the outcome of the consultation with schools on the proposed changes to the Controls on Surplus Balances Scheme.</p> <p>A total of 58 schools had responded to the consultation, 57 of which were in favour of the proposed changes.</p> <p>The working group agreed that the proposal to amend the funding scheme to withdraw the control mechanism on surplus balances with effect from the 2013/14 financial year be supported.</p>	
3	<p>School Budget 2013-14 Update</p> <p>EW updated the working group on progress to date with school budgets for 2013-14:</p> <ul style="list-style-type: none">• Confirmation had been received from the EFA that the Wiltshire formula was compliant with the new rules.• Budgets had been recalculated following the last Schools Forum meeting to reflect a 0.35% reduction in per pupil funding. Deprivation funding rates had also been reduced by 0.35% but lump sums and SEN funding elements had been left unchanged.• Recalculated figures had been circulated to Schools Forum members as agreed• It was anticipated that budgets would be issued to schools by the end of the week• Delegated budgets would not include top up payments for high needs pupils or funding from the pupil growth fund. Schools receiving these elements of funding would be notified by separate schedule which would be included in the budget packs.• Initial copies of the forward planning software (FPS) had been sent out to schools and a patch would be issued with the new funding rates once budgets had been finalised and sent out.• 5 budget roadshows had been held across the County in addition to a specific roadshow for staff and governors from Special Schools <p>EW outlined the guidance and information that would be issued to maintained schools with their budgets. MW requested a copy of the</p>	EW

	<p>information pack that was being sent to maintained schools.</p> <p>EW circulated the funding rates for the mainstream funding formula and for top up rates for special schools, resource bases and enhanced learning provision (ELP). She explained that per pupil and other funding rates were stated gross of all new delegation and that an adjustment would be included on the funding certificate to deduct the funding for budgets to be de-delegated. For any in year adjustments to school budgets this meant that reduced funding rates would need to be used to ensure de-delegated budgets were not included.</p>	
4	<p>Schools Funding Reform – Review of 2013-14 arrangements (DfE consultation attached)</p> <p>EW drew member’s attention to the consultation document issued by the DfE <i>Review of 2013-14 School Funding Arrangements</i>. The final date for responses is 26th March 2013. The document picked up on many of the issues that Wiltshire had raised in the response to the initial consultation on the new funding arrangements including issues relating to small schools, rurality, service pupils and the use of thresholds for funding pupil mobility.</p> <p>The key issues for Schools Forum were discussed and it was agreed that the following information would be helpful to assist Schools Forum in responding to the consultation, in particular the issues around “necessary” small schools and rurality/sparsity:</p> <ol style="list-style-type: none"> 1. Benchmarking information on the sizes of schools in similar rural counties; 2. Per pupil funding for different sizes of schools within Wiltshire under the old and new formula, pre and post MFG 3. Data on the nearest second school for pupils attending small rural schools. <p>The group discussed whether a joint response from the LA and Schools Forum should be made or whether separate response would be more appropriate. It was considered that for some of the questions the responses may differ and so separate responses may be required.</p>	EW
5	<p>Free School Meal Pooling Scheme</p> <p>EW presented a report on the estimated balance on the Free School Meal Pool at the year end. It was projected that a balance of £80,096 would remain at the end of 2012-13. Claims in the current year had been higher than in 2011-12 and reflected an increase in the number of pupils eligible for and accessing free school meals.</p> <p>EW recommended that this balance should be retained in full within the pool and that no cash back should be distributed in the current year. It was agreed that this recommendation should be made to Schools Forum.</p>	EW
6	<p>AOB</p> <p>No AOB was discussed</p>	
7	<p>Date of Next Meeting</p> <p>Next meeting to be held on 13th June, 8.30am at Shurnhold</p>	

Report from the Schools Forum SEN Working Group

Purpose of report

1. To report on the joint meeting of the SEN Working Group and High Needs Formula Review Group, held on 26th February 2013.

Main considerations for School Forum

2. The draft minutes of the meeting are attached at Appendix 1.
3. The SEN Group made the following recommendations:

4. ***Review of Top Up Rates for 2014-15***

The Group requested that officers review the value of top-up rates for 2014-15 including a review of the costs of each type of provision and the relativities between top up rates for different bands and types of provision. It was agreed that a small working group would be required and that this would need to include representatives from schools.

5. ***School Funding Reform – DfE review of School Funding Arrangements 2013-14***

The Group considered the DfE consultation document on funding arrangements for 2013-14 and made the following recommendations in relation to how Wiltshire should respond:

- Q19 – the difficulties in collecting accurate data from the annual census were discussed and it was agreed that this should be fed back as part of the response.
- Q20 – it was agreed that Wiltshire would support a move towards the £6,000 threshold for low cost high incidence SEN as this would increase consistency between local authority areas. It was noted that in the SW only 2 authorities had not implemented the recommendation to delegate the first £6,000 for SEN.
- Q21 – it was agreed that the DfE should play an active role in spreading good practice and model SLAs etc
- Q22 – in relation to post-16 funding streams the group requested that we note the need to work more closely with Adult Care services for students aged 18 and over. This will be made easier through the development of services for 0-25 year olds in line with the SEND Green Paper.

6. ***Proposals***

That Schools Forum note the recommendations of the SEN Working Group.

Carolyn Godfrey
Corporate Director

Report author: Liz Williams, Head of Finance
01225 713675
Elizabeth.williams@wiltshire.gov.uk

Schools Forum SEN Working Group

26 February 2013, 2pm, Canvey Room, East Wing

Minutes

Present: Becky O'Brien (King's Park Primary School), Gina Shanahan (King's Park Primary School), Debbie Bennett (Hardenhuish Academy), John Hawkins, Karina Kulawik, Chris Whitfield, Julia Cramp, Liz Williams

Apologies: Sarah Findlay-Cobb, Phil Beaumont, Carol Grant

1	<p>Minutes from Previous Meeting</p> <p>The minutes of the previous meeting had been presented to Schools Forum and there were no outstanding matters arising</p>	
2	<p>School Funding Reform – update on budget for 2013-14</p> <p>EW updated the group on budgets for High Needs Pupils in 2013-14. It was expected that budgets would be issued to maintained schools at the end of the week. DB confirmed that the EFA had issued statements of post-16 pupil numbers to academies but that these had not corresponded to the numbers agreed with the LA, EW noted that this had also been the case with post-16 numbers confirmed by the EFA to Special Schools.</p> <p>EW explained that whilst special school academies would move on to the new place plus funding system from April 2013, mainstream academies would not move on to the new system until September. This would mean that the LA would not be paying top ups to academies until September as for the period April to September the resource bases and ELP would still be fully funded through the General Annual Grant.</p> <p>Top up rates for 2013-14 were circulated for information. BO'B commented on the difference in value between top up rates for Complex Needs Centres and other resource bases. KK explained that the funding for complex needs centres had been based on the staffing model originally developed for the centres. It was agreed that a review of all top up rates would need to take place in time for implementation in 2014-15. KK explained that the relative cost of LA provision compared with the independent sector would also need to be taken in to account in any review as there was a danger that top up rates for Wiltshire schools could become more expensive than independent provision.</p> <p>It was agreed that a working group would need to be formed to carry out the review of banding and other funding issues in relation to high needs pupils. KK and EW would be attending WASSH on 7th March to discuss some of the issues particularly relating to ELP provision and funding.</p>	
3	<p>School Funding Reform – DfE review of 13-14 funding arrangements</p> <p>EW circulated the consultation document issued by the DfE: Review of 2013-14 School Funding Arrangements. Section 3 of the document focussed on issues relating to funding for high needs pupils. it was noted that the DfE does not intend to review the level of funding for the</p>	

	<p>base values for specialist and alternative provision. The questions therefore focussed on the notional SEN budgets for schools and post-16 funding.</p> <p>The group considered the questions as follows:</p> <p>Q19 – the difficulties in collecting accurate data from the annual census were discussed and it was agreed that this should be fed back as part of the response.</p> <p>Q20 – it was agreed that Wiltshire would support a move towards the £6,000 threshold for low cost high incidence SEN as this would increase consistency between local authority areas. It was noted that in the SW only 2 authorities had not implemented the recommendation to delegate the first £6,000 for SEN.</p> <p>Q21 – it was agreed that the DfE should play an active role in spreading good practice and model SLAs etc</p> <p>Q22 – in relation to post-16 funding streams the group requested that we note the need to work more closely with Adult Care services for students aged 18 and over. This will be made easier through the development of services for 0-25 year olds in line with the SEND Green Paper.</p>	
4	<p>SEN Pathfinder – Update</p> <p>JC updated the group on the new expectations arising from the extension of the SEND Green Paper Pathfinder programme. The pathfinder programme has now been extended to September 2014. A key development is the Education, Health & Care Plan which is now being tested in Wiltshire. DB and BO'B noted that they were working on new plans with pupils in their schools and gave positive feedback.</p> <p>A further development is the need for LAs to publish a local offer covering Education, Social Care and Health services for children and young people with disabilities, and their families. This would include the need to define what schools would need to provide for the first £6,000 delegated to schools within the funding formula. DB noted that the services that schools could deliver may vary with the size of school with bigger schools possibly able to achieve economies of scale and more varied provision.</p>	
5	<p>AOB</p> <p>JH asked how special schools would be supported if they got in to financial difficulty as a result of the new funding arrangements. EW responded that the LA would be working with schools on a case by case basis once budgets were issued and schools began to identify the impact on their budgets. EW noted the 2% turbulence factor and the extended payment periods that had already been put in place to support schools and reduce the impact of in year pupil movement but recognised that the impact of funding reform would be greater on some schools than others.</p>	
6	<p>Date of Next Meeting</p> <p>Next Meeting to be held on Monday 10th June, 9am, County Hall</p>	



Department
for Education

Review of 2013–14 School Funding Arrangements

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Introduction

1. We have made a clear commitment to reform the school funding system and end the inequalities and inconsistencies that have built up over many years. We want a funding system which:
 - is **up-to-date** and reflects the current demographics of pupils across the country;
 - targets **additional money to pupils who need extra support** to achieve;
 - is **consistent and pupil-led** so that, wherever a pupil goes to school, he or she will attract similar levels of funding;
 - is **transparent** so that parents, head teachers, governors and tax-payers can see clearly how funding has been distributed and why;
 - gives pupils (supported by their parents and carers) **genuine choice** about which school they attend.
2. We confirmed in March last year that we will introduce a national funding formula in the next spending review period but that we will take a gradual approach to ensure that we get it right.
3. Our priority for 2013-14 therefore has been to make some improvements to the current system so that there is a greater focus on the needs of pupils and greater consistency across local areas. We have:
 - Simplified and rationalised the formula factors that local authorities can use when allocating funding to schools, in order to move away from overly complex and opaque formulae. This means that, across the country, schools will be funded using up to 12 clearly defined factors. Those 12 factors represent the circumstances under which we believe schools should attract additional funding (for example, for deprived pupils, for pupils with low attainment, or for those operating on split sites) and represent the likely direction of a national funding formula. We removed a large number of factors which we did not believe justified additional funding (these included swimming pools and floor space).
 - Ensured that the maximum amount of money is passed on to schools to spend as they see fit.
 - Put in place a more transparent and comparable process for funding academies by reducing the time-lag in their funding from 17 months to just 5.
 - Reformed the funding arrangements for pupils with high needs by introducing the 'place-plus' system. This ensures that schools have clearly identifiable budgets for

pupils with special educational needs (SEN) and that local authorities take a consistent approach to funding needs over and above those budgets.

- Strengthened the local decision-making process by ensuring that Schools Forums operate more transparently, and that school and academy representatives have a greater say about how money is distributed.
4. We have always been clear that these arrangements are intended to pave the way for a new national funding formula and that there are still a number of issues about its shape and structure that we need to resolve. We want to ensure that we continue to make progress and so, over the coming weeks and months, we will be looking at whether the 2013-14 arrangements are simplifying the system, securing greater consistency between local areas and moving us towards a national funding formula.
 5. We know that some local authorities, schools and parents are concerned about the impact of the new arrangements. While we remain committed to the core principles at the heart of the funding reforms, the review we are carrying out will consider whether and to what extent we need to make small changes in 2014-15 in order to address those concerns and prevent unacceptable consequences. The areas on which we have focused in this document are those most frequently raised with us or issues we have identified as requiring further consideration through our analysis of the budgets that have been set for 2013-14.
 6. We are clear, however, that as we move towards a pupil-led system, there will be changes to schools budgets and some degree of re-allocation between schools. That is a necessary and not an unintended consequence of reform. The Minimum Funding Guarantee (MFG) ensures that, in most cases, schools will not lose more than 1.5% of their funding per pupil in both 2013-14 and 2014-15. We have also confirmed that an MFG will continue to operate after 2014-15 although we cannot confirm the exact level.
 7. This document gives a summary of how the 2013-14 funding arrangements have been implemented and outlines some specific concerns that have been raised. It seeks views from a range of interested parties including local authorities, head teachers, principals, governors and locally elected members on a number of questions.
 8. There is a template which can be downloaded separately which you can use to answer those questions and then email to the Department at Funding.REVIEW2013-14@education.gsi.gov.uk by 26 March 2013.

Section 1: Are we moving towards national consistency?

9. Local authorities were asked to submit a pro forma containing information about their simplified funding formula by 31 October 2012. After the results of the autumn census and confirmation of the DSG settlement for 2013-14, revised pro formas were submitted on 22 January.
10. At the time of writing this document, not all of the January pro formas had been submitted to the Department or analysed. In the interests of publishing this document and allowing sufficient time to make any changes for 2014-15, we have used the October pro formas to give a broad assessment of 2013-14. The Annex includes graphs which give a fuller picture of how funding is being distributed across the country. We realise that this does not represent the most up-to-date picture and will update our understanding once the January pro formas have been fully analysed and quality-assured.
11. In analysing the pro formas, we have been keen to understand whether we are moving towards a more pupil-led system, and where the greatest variation has arisen. While the funding reforms have enabled local authorities to allocate funding to schools on a much more consistent and comparable basis, the data shows that there is still variation in how local authorities have distributed their Dedicated Schools Grant within the constraints. This is to be expected given that per-pupil funding allocations vary across the country, making each local authority's starting point different from its neighbours.
12. The majority of primary Age Weighted Pupil Units (AWPUs) are in the range of £2,250 to £3,250, although there are a few significant outliers of over £4,000. The 15 local authorities with highest primary AWPUs are all in London. The secondary AWPUs show a similar pattern and, again, the few outlier authorities with significantly higher secondary AWPUS are mostly in London.
13. Overall, the proportion of funding being spent on the AWPUs varies between 60% and 87%, with half of local authorities allocating between 75% and 80%.
14. The data does, however, show good progress towards our aims of moving to a more pupil-led system. Authorities are allocating at least 77% of funding through a combination of the pupil-led factors (these are the AWPU, deprivation, prior attainment, EAL, looked after children and pupil mobility) and around 49% of authorities are allocating between 90% and 95% of funding in this way.
15. We are keen to ensure that even more money is targeted to the needs of pupils, rather than to the circumstances of schools. We said in the document we published in June 2012, [School funding reform: Arrangements for 2013-14](#), that we would consider whether to set a minimum threshold for either the AWPUs or a combination of all the pupil-led factors.
16. Setting a minimum threshold for the AWPUs alone may not be meaningful given that the variation in deprivation across the country requires some local authorities to target more funding to deprived pupils than others. We are therefore inclined to set a minimum threshold for all the pupil-led factors. We realise a requirement of this nature

would have an impact on the level of the lump sum and so we would be interested in views on this. If, for example, we set it at 85% then seven local authorities would need to move money away from the lump sum, post-16 and premises factors and put it into the pupil-led factors.

Q1: Should we set a minimum threshold for the pupil-led factors and, if so, at what level?

17. There is considerable variation in the proportion of funding allocated through the deprivation factors – ranging from 2% to 25% (with 83% of local authorities allocating between 2% and 12%). There could be a number of explanations for this variation and we would be interested in learning more.

Q2: On what basis did local authorities decide on the quantum or proportion of funding to target to deprived pupils?

18. Another finding from the pro formas relates to the prior attainment indicators. Six local authorities chose not to use this formula factor at all and an additional four only used it for pupils in secondary schools.
19. There is also a significant degree of variation in the per-pupil allocations for the prior attainment factors. They range from £125 to £8,300 for primary pupils and £158 to £10,688 for secondary pupils. In both cases there are one or two local authorities with markedly higher per-pupil amounts than the rest, but even disregarding this, the variation is still significant.

Q3: On what basis did local authorities decide on the per-pupil amounts for the prior attainment factors?

20. Fewer than half of local authorities used the mobility indicator. This may be because we only introduced it in June 2012 in response to the representations we received as a result of our March 2012 consultation. Nonetheless, the per-pupil allocations vary in both primary and secondary phases from £10 to £2,000 (although there is a significant outlier of £5,012 for secondary pupils). We discuss the effectiveness of this indicator in section 2 of this document.
21. The lump sums chosen by local authorities varied significantly from £42,000 right up to the maximum cap of £200,000. The most common choice was £150,000 (used by 26 authorities) but, overall, there is no consistency in the values set. The lump sum is discussed again in section 2.

Section 2: Areas of concern and possible changes for 2014-15

22. We have been clear in our publications and in our discussions with local authorities, schools and other representatives that the new arrangements require a radical change in the way schools are funded in many local areas. Moving towards a more consistent and transparent system will inevitably lead to shifts in school budgets. Local authorities, in partnership with their Schools Forums, will therefore need to review the whole of the distribution, including the primary: secondary ratios and the weightings for deprivation and the lump sum.
23. Nonetheless, we are aware that some schools, local authorities, parents and governors are worried about the impact of the new arrangements. So far, reactions to the 2013-14 arrangements have been limited to a few issues and have come from a small minority of mainly rural local authorities.
24. In October 2012, in response to those concerns, the Department wrote to all Directors of Children's Services and Members of Parliament to provide reassurance that we will review the 2013-14 arrangements. The Department also confirmed that, if we find any unacceptable consequences for schools, we will make further changes in 2014-15 in order to prevent those consequences. Below is a list of the current 12 allowable factors.
- Age weighted pupil unit (AWPU)
 - Deprivation
 - Looked after children
 - SEN / prior attainment
 - EAL
 - Pupil mobility
 - Post-16 provision
 - Lump sum
 - Split sites
 - Rates
 - PFI
 - London fringe
25. In light of the feedback we have received to date, we are seeking specific views on whether changes are needed to three of these factors. They are: prior attainment; pupil mobility; and the lump sum. These are considered in paragraphs 27 to 38 below.
26. We are also aware that there are concerns about the factors which we are no longer allowing and about the restrictions on the targeting of deprivation funding. This is discussed in paragraphs 39 to 50 below.

Prior attainment

27. We know that the current prior attainment indicators are not a perfect measure for identifying pupils with special educational needs (SEN). They are, however, not intended to be used on their own and we have been clear that local authorities can use a combination of deprivation, prior attainment and AWPU and/or elements of the lump sum as indicators for the notional SEN budget. Furthermore, we have allowed local authorities flexibility to target additional resources to schools where the notional SEN budget is insufficient to meet some of the costs relating to pupils with high cost SEN (see paragraph 58 in section 3 for further details). We do, however, think it is important to allow a proxy measure of low attainment to be used and that is why we have allowed authorities to use EYFSP and Key Stage 2 data. As we acknowledged in June, the current EYFSP comes to an end this year and the new framework is being updated and will come in to effect from this autumn.
28. We are currently looking at pilot data from the new EYFSP framework to create a new proxy indicator to identify low cost SEN related to attainment and we will provide more information this summer. In the interim, as local authorities already have data for all of their EYFS pupils and KS1 pupils (apart from those entering the system this year) we expect local authorities to continue with the current proxy until analysis is completed on the new framework.

Q4: Do you agree that local authorities should continue to use EYFSP data as an attainment-related proxy or should we consider use of a different indicator to identify low cost SEN in primary schools? If so, what indicator?

29. For secondary schools we propose to continue with the attainment-related proxy for KS2 whereby all pupils who fail to achieve Level 4 or above in both English and mathematics at Key Stage 2 will be eligible for low cost SEN support¹.

Pupil mobility

30. The mobility factor is intended to address the administrative costs incurred by schools that experience high levels of pupils leaving and joining throughout the academic year. We have heard concerns that the factor, as currently designed, does not differentiate between a school that has few mobile pupils (and therefore incurs significantly lower administrative costs) and a school that has significantly larger numbers of mobile pupils (and therefore incurs higher costs).

Q5: Would it help to allow an additional weighting to be given if a school experiences in-year changes to pupil numbers above a certain threshold? If so, where should this threshold be set?

The lump sum

31. We introduced the single lump sum predominantly to provide sufficient funding for those necessary small schools, particularly in rural areas, that may not be able to operate on the basis of their per-pupil funding alone. Small schools benefit

¹ The year 7 literacy and numeracy catch up premium also targets funding at year 7 pupils who have not achieved Level 4 at KS2 in reading, mathematics or both. More detail is available here: <http://www.education.gov.uk/schools/pupilsupport/year7catchup>

proportionately more from the lump sum because it acts as a larger boost to their per-pupil funding than for larger schools, and a single lump sum for all schools ensures that there can be no ambiguity over how much funding goes to one phase or type of school compared to another.

32. It has, however, become apparent that the current lump sum arrangements are causing concerns, particularly in relation to small schools in rural areas, and we would like to understand the factors that are driving this.
33. It is not our intention that any necessary small school should be forced to close as a result of these reforms, and we acknowledge the need to support unavoidably small but necessary schools, for example in very sparsely populated areas. In seeking to achieve this, we are considering the possibility of introducing an optional school-level sparsity factor for 2014-15, specifically to target funding at necessary small schools in rural areas.
34. We expect that, in sparse areas, pupils have to travel further to school, and have less choice over which school they can attend. The proposed sparsity factor could, for every school:
 - identify the pupils for whom it is their nearest school (this will not necessarily be the school the pupils actually attend); and
 - for those pupils only, measure the distance that they live from their *second nearest* suitable school. Where this distance is high, we assume that it becomes difficult for the pupil to attend any school other than the nearest one, making the existence of that school necessary. Taking the average distance that relevant pupils live from their second nearest school would allow us to apply a sparsity factor based on set thresholds.
35. This could identify the necessary schools serving pupils in remote areas with limited alternatives; these schools are necessary because children could not realistically attend another school. The simplest way to use this measure would be to set a threshold and provide a sparsity uplift to any schools that have an average distance above the threshold. Separate thresholds would need to be applied for primary and secondary schools, as pupil travel distance varies by phase. Alternatively, extra funding could be given to schools as the sparseness of an area increases.
36. Data is available to produce this measure using crow flies distances. But such a measure would be unlikely to be fit for purpose as this would not take into account the actual time that it would take a pupil to travel to a school, so we are investigating whether the measure could use travel distance instead.

Q6: In areas with large numbers of small schools, could the problem of having a fixed lump sum be overcome by reducing the relevant AWPU?

Q7: Would having the ability to apply a separate primary and secondary lump sum avoid necessary small schools becoming unviable? If so, how should we deal with middle and all-through schools?

Q8: We said in June that we would review the level of the lump sum cap (currently £200,000) for 2014-15 in order to establish whether it is the minimum cap needed to ensure the sustainability of necessary small schools. If we continued with one lump sum for both primary and secondary, what would be the minimum level of cap needed to ensure the sustainability of necessary small schools? If we had separate lump sums for primary and secondary, what would be the minimum cap needed for each in order to ensure the sustainability of necessary small schools?

Q9: Would using a school-level sparsity measure to target a single lump sum, based on distance between pupils and their second nearest school, avoid necessary small rural schools becoming unviable?

Q10: What average distance threshold would be appropriate?

Q11: If we had a sparsity measure, would it still be necessary to have a lump sum in order to ensure that necessary schools remain viable? Why? What is the interaction between the two?

37. We have proposed a sparsity measure based on pupil distance to second nearest school as we have found this to be the most pragmatic option. However there are a range of possible sparsity measures that can be used, for example distance between schools, none of which have been ruled out.

Q12: What alternative sparsity measures could we use to identify necessary small schools in rural areas?

38. As with all schools though, small schools may have to make savings and efficiencies in order to live within their means. This may include merging formally with other small schools in the area to reduce fixed costs. However, we know that in some cases the lump sum can be a disincentive to schools from merging where it is rational to do so, because it results in the loss of one of the lump sums.

Q13: Would the ability for both schools to retain their lump sums for one or two years after amalgamation create a greater incentive to merge?

39. A few other issues have been brought to our attention since we published the June 2012 document. In most cases, we have no or little evidence about the cause of these issues. This section sets out the rationale behind our current position and seeks evidence on why the issues raised cannot be addressed through the new funding arrangements.

Targeting funding to deprived pupils

40. We have heard concerns from some local authorities that the 2013-14 arrangements have resulted in funding moving away from schools with high numbers of deprived pupils. We believe it is very important that deprived pupils are allocated more funding than non-deprived pupils. We do however recognise that the removal of certain factors (such as floor space and other premises-related issues) and a greater focus on pupil-led factors may cause some schools to experience changes to their budgets.

41. As we set out in the beginning of this section, these new arrangements may require

local authorities to change their formulae in a more radical way. The Government is committed to raising the life chances of pupils from deprived backgrounds and ensuring that deprived pupils receive additional funding. It is not acceptable that deprived pupils are penalised as a consequence of local authorities seeking to maintain the status quo in their area and not exploring the full range of options open to them to target money to deprivation. By using an appropriate combination of the permitted deprivation indicators (FSM, Ever6 and IDACI) with an optimum per-pupil rate, local authorities should be able to target money more adequately to deprived pupils.

42. If, however, you feel that even with the optimum use of indicators and an appropriate per-pupil rate, schools with a high proportion of deprived pupils would lose significant amounts of funding, we need to understand why that would be the case.

Q14: If you think local authorities will be unable to use the allowable deprivation indicators in order to prevent significant losses to schools with a high proportion of deprived pupils, why do you think that is the case?

Service children

43. A number of schools with large numbers of service children have written to us to express concerns that they are set to lose funding as a result of the new arrangements. This is largely because some local authorities were targeting extra funding to schools with service children through other factors (such as the lump sum, for example). We know that in a few parts of the country, the additional funding being allocated to schools with service children was very high.
44. The allowable factors in the formula are intended to support pupils that do not achieve as well as their peers, for example those from deprived backgrounds and those with low prior attainment. The Department has no evidence that this is the case for service children as a group.
45. We do recognise, however, that service children sometimes require additional pastoral care because of their circumstances and this is reflected in the Service Premium (which currently allocates £250 to every service child and will rise to £300 in 2013-14). We also recognise that the mobile nature of service children can sometimes create additional costs to schools and that is why we have allowed local authorities to apply a pupil mobility factor to their formulae.
46. We have received no evidence as to why service children should attract higher levels of funding over and above that received through the Service Premium, the Pupil Premium and factors in the local formula to reflect pupil mobility, deprivation, prior attainment and EAL. It is therefore difficult to justify targeting additional money at this group of children.

Q15: Do you have any evidence that service children (once we account for deprivation, mobility and pastoral care through the Pupil Premium) require additional funding in order to achieve as well as non-service children?

Other groups of pupils

47. As we state above, the evidence we have indicates that we have allowed local authorities enough flexibility to target funding to low-achieving pupils. This, however, remains an important area for the Department and so we want to ensure that we do not overlook vulnerable groups of pupils.

Q16: Have the 2013-14 reforms prevented local authorities from targeting funding to groups of pupils that need additional support? If so, which?

Schools with falling rolls

48. Greater choice for pupils supported by more outstanding schools is one of the Department's principal objectives and this is underpinned by our Academies and Free Schools programmes. A successful funding system should enable pupils to attend the school of their choice without the funding being 'locked in' at a different school. It should also enable good and outstanding schools to expand so that more pupils can benefit and not be forced to go to less popular schools.

49. If a school has falling rolls, it should consider its longer term viability. It may consider merging or federating with other schools in order to save money but also to improve its leadership capacity and quality. We are clear that, in times of economic austerity, money should be spent on pupils who are actually in schools and not spent on funding empty places. If a school is small or in a rural area and has limited options, we have set out options in paragraphs 31 to 38 above which should help.

50. We are aware that, in some areas, the demographic trend has meant that secondary school pupil numbers have reduced but a bulge is imminent as more primary pupils move up. In such cases, local authorities can retain a small fund for schools in financial difficulty (this would need to be de-delegated by maintained schools). This can be used to help bridge the gap between the falling rolls and the imminent bulge. Schools should also consider more innovative use of their facilities, such as hiring out school halls or swimming pools.

Q17: In cases where a population bulge is imminent, what is preventing good and necessary schools from staying open?

Q18: Are there any other circumstances in which falling rolls are unavoidable in the short term?

Section 3: Options for adjusting high needs funding in 2014-15 and beyond

51. As part the 2013-14 reforms, we introduced a new framework for funding provision for children and young people with high level needs, including special educational needs (SEN), learning difficulties and disabilities (LDD) and those requiring alternative provision (AP). This framework is designed to go alongside the new arrangements for SEN in the Children and Families Bill. Schools, colleges and other providers will be given funding within their formula sufficient to enable them to meet costs up to about £10,000 for pupils and students with SEN and LDD. This base funding does not relate to specific individuals, but is intended to meet the costs of all those with SEN and LDD who are at the institution, up to the high needs threshold. Funding to meet additional costs follows the individual pupils and students with high needs and will come from the home local authority – i.e. the local authority in which the pupil or student lives – in the form of top-up funding.
52. The base funding is calculated differently according to the type of provider and age of the pupil or student. Included within mainstream schools' normal per-pupil funding is a notional SEN budget to meet the costs of pupils with SEN up to £6,000. Some local authorities are setting a different threshold as a transition to the £6,000 level. Special schools will get a standard £10,000 for each planned place. A similar system will operate for AP for the pre-16 age group, where the base funding will be £8,000 per place. All base funding for post-16 students with high needs – in schools, colleges and other providers – will comprise the programme funding that post-16 student places would normally attract, according to the new national 16-19 formula, plus £6,000 for each planned high needs place.
53. Top-up funding is for the commissioning local authority to determine, by agreement with the providers. Schools rather than local authorities will often place pupils in pupil referral units (PRUs) and other AP and they will be responsible for paying the top-up funding in these circumstances.
54. Hospital education is being funded through transitional arrangements which essentially preserve the institution's funding in 2012-13. We are looking at options for a different funding approach in 2014-15 or subsequently.
55. The base funding for maintained schools, the top-up funding and funding retained centrally for SEN support services, hospital education services, AP services and other services specified in the relevant regulations is all paid for from the local authority's high needs budget. Local authorities have flexibility to determine the balance of funding between their high needs budget, schools budget and early years budget. In particular, they can move funds between their high needs budget and schools budget to make sure that, on the one hand, they have sufficient funding for all those with high needs and, on the other, schools have sufficient funding in their notional SEN budgets.

Issues for 2014-15 and beyond

Base funding for specialist providers

56. Base funding for specialist providers is set, according to the number of planned places, at: £10,000 per place for pre-16 SEN; a bit more, on average, for SEN and LDD in the 16-24 age group; and £8,000 for AP. We are not proposing to review at this stage whether these are broadly the right levels.
57. Some have argued that the AP level is too low and should be brought up to £10,000. However, there is evidence that low cost AP in some areas would be over-funded if we were to change the level of base funding for PRUs and other forms of AP. We believe it is too early to consider changes at this stage, and will therefore look at this as part of a subsequent review.

Notional SEN budget for mainstream schools

58. Mainstream schools and academies receive a notional SEN budget, determined by the local authority using the permitted formula factors (as discussed in section 2). Some local authorities have told us that limitations on the formula factors they can use do not allow them to target funds to those pupils with particular needs or where schools attract a higher number of pupils with high needs because they have a good reputation for meeting those needs. We have therefore allowed local authorities flexibility to use their high needs block to make additional allocations outside the formula to schools that have a disproportionate population of pupils with high needs, after consulting the Schools Forum.
59. We are also planning to introduce to the schools census, from 2014, a marker that will indicate those pupils who receive top-up funding. This high needs marker could be used to target extra funding to schools that have a disproportionate number of high needs pupils, but cannot be introduced before 2015-16 because the census data will not be available.

Q19: Would a formula factor that indicates those pupils who receive top-up funding be a useful addition to help deal with the funding of high needs?

60. Despite the strong recommendation that local authorities should construct their schools' notional SEN budgets so that schools are required to contribute up to £6,000 towards the additional support costs of their pupils with SEN, some have adopted a different threshold as a transitional arrangement. This creates differences in the base funding between neighbouring local authorities, and therefore in the top-up funding levels they are implementing. Commissioning authorities, however, are likely to be dealing with schools in more than one authority area.

Q20: To address the variation in base funding between neighbouring local authorities, how fast should local authorities be required to move towards the £6,000 threshold? Should it be made a requirement from 2014-15?

Arrangements for top-up funding

61. We are allowing local authorities flexibility in the top-up funding arrangements. In many cases these arrangements for 2013-14 will not have been finalised, particularly for pupils and students starting at schools and colleges in September. It is therefore too early to consider changing the national requirements on top-up funding. We are, however, interested in receiving feedback on the issues that have been raised so far, and whether any changes should be considered for 2014-15.
62. In particular, some stakeholders have suggested that the new arrangements would create additional administrative processes for negotiating and paying top-up funding. We have encouraged local authorities to look carefully at how they can reduce bureaucracy, for their own organisation as well as for the schools and PRUs they maintain, and for those institutions to which they pay top-up funding. We would be interested in good practice in this area that can be shared more widely.

Q21: Should the Department play an active role in spreading good practice and model contracts/service level agreements?

Pre and post-16 arrangements

63. The Department is aware that the administrative processes pre- and post-16, in the run-up to 2013-14, have not been co-ordinated as helpfully as they might have been. The separate data collection exercises and implementation timetables for pre- and post-16 have been confusing. We will be looking to improve this substantially for 2014-15. But we also wish to look at how arrangements can be brought closer together so that they are easier to understand and use for local authorities, colleges, schools and Academies.

Q22: Do you have ideas about how the pre and post-16 high needs systems might be brought closer together?

Section 4: Schools Forums

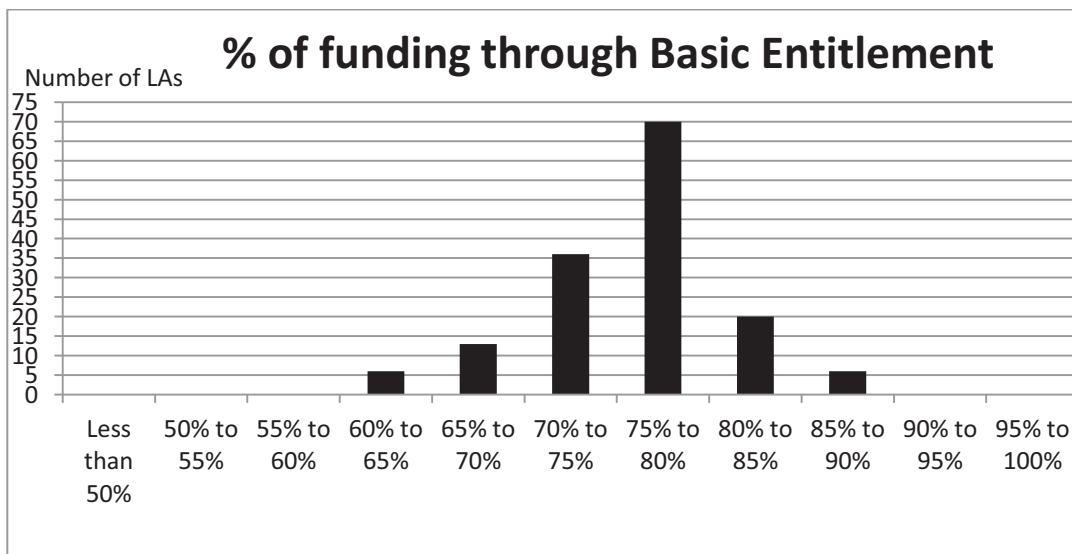
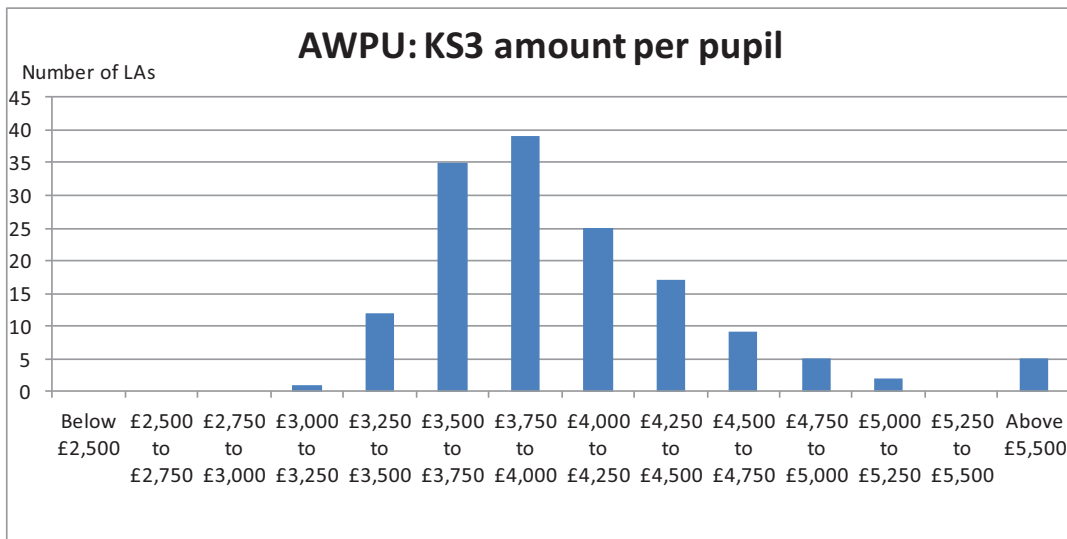
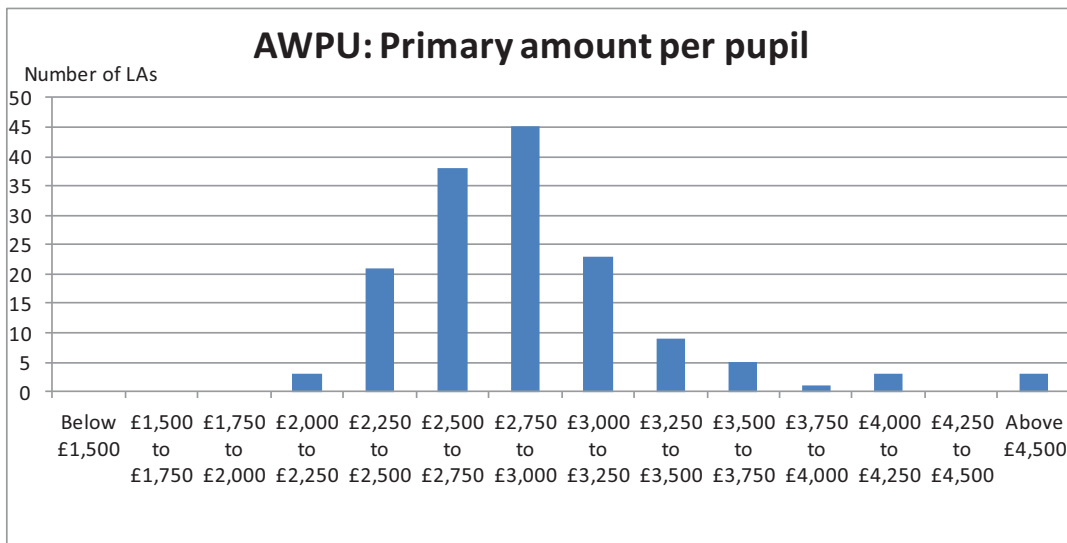
64. We have heard concerns that Schools Forums were not always operating fairly or transparently. Examples include meeting papers and agendas not being published and voting rights being spread too widely across a range of members. In response to these concerns, we made a number of changes which came into effect on 1 October 2012. We have:

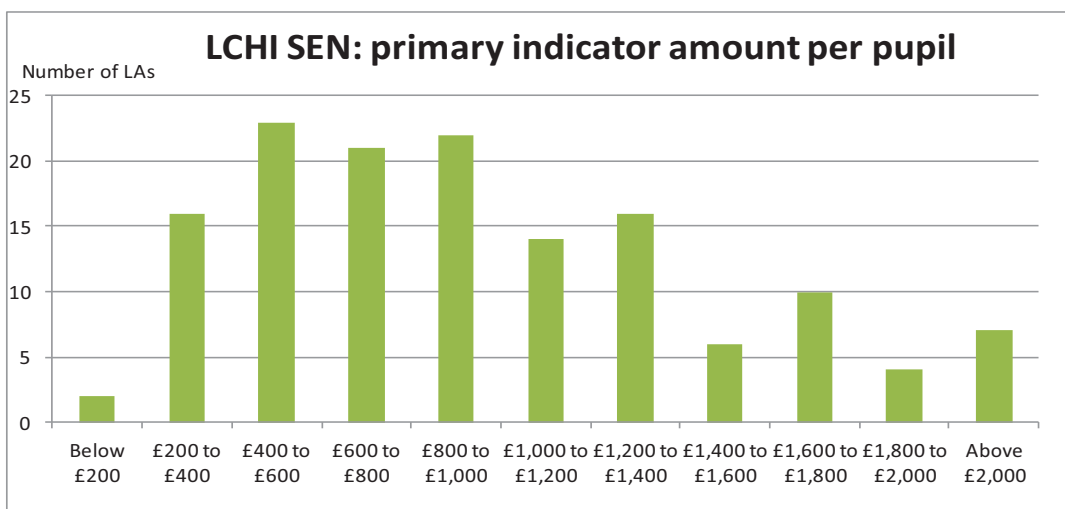
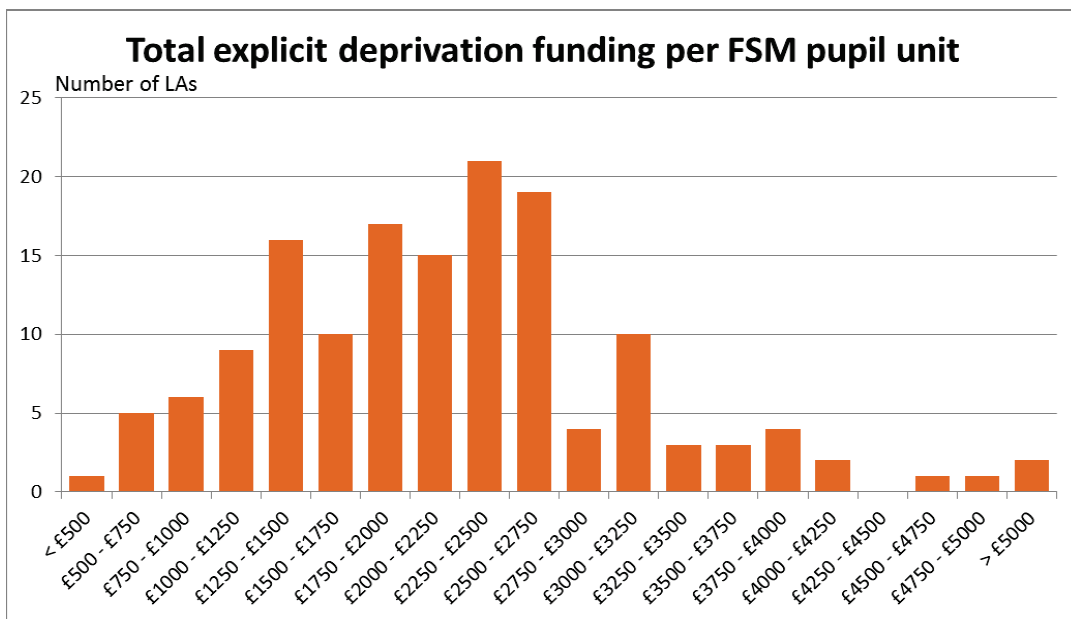
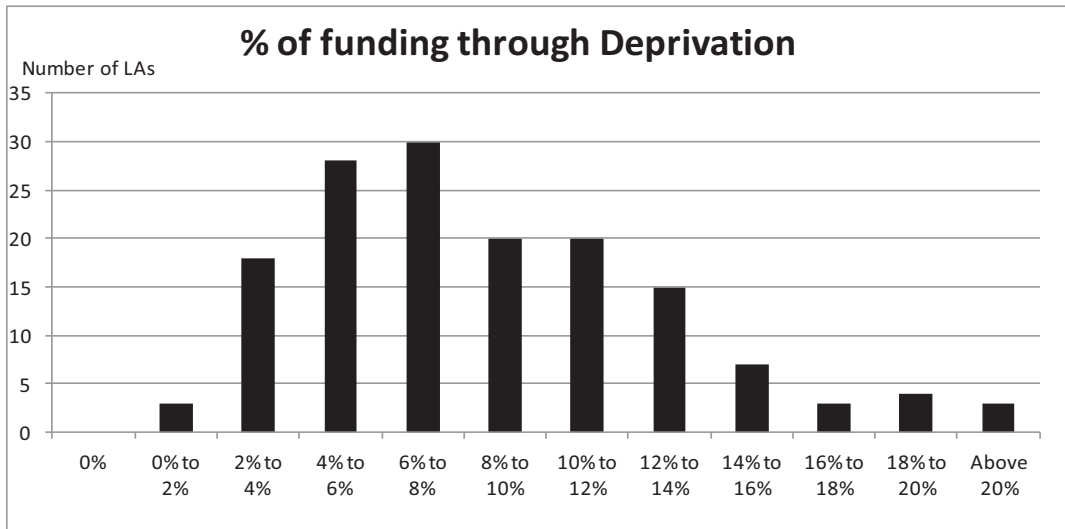
- removed the requirement to have a minimum of 15 people on a Forum;
- limited the number of local authority attendees from participating in meetings unless they are a Lead Member, DCS, DCS representative or are providing specific financial or technical advice (including presenting a paper to the Forum);
- restricted the voting arrangements by allowing only schools members and the PVI members to vote on the funding formula;
- required local authorities to publish Forum papers, minutes and decisions promptly on their websites;
- required Forums to hold public meetings, as is the case with other Council Committees;
- given the EFA observer status at Schools Forum meetings.

65. We said that we would keep these changes under review and, if there is evidence that schools are still concerned about the operation of Forums, we would consider making further changes. We are not inclined to make any further changes for 2014-15 as we think more time is required to assess how the new arrangements are being embedded and whether they are improving the operation of Forums.

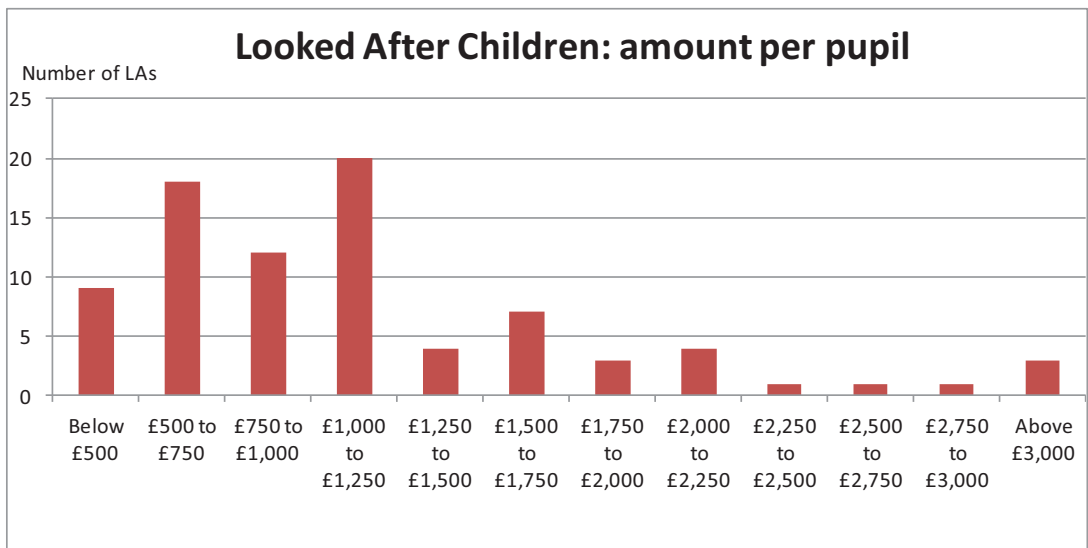
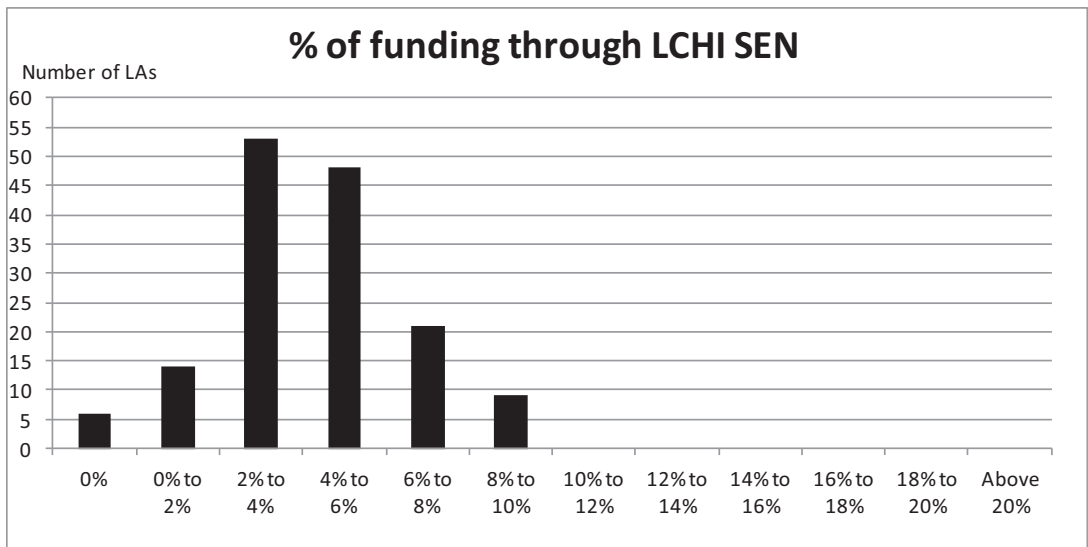
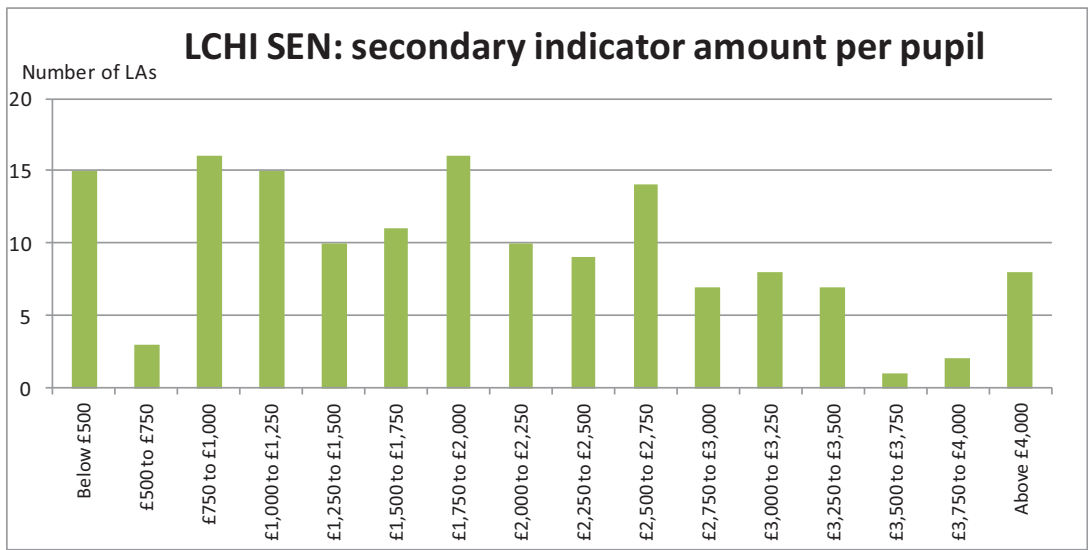
Q23: Do you think that Schools Forums are operating more democratically and transparently? If not, what further measures could the Department take in order to improve this?

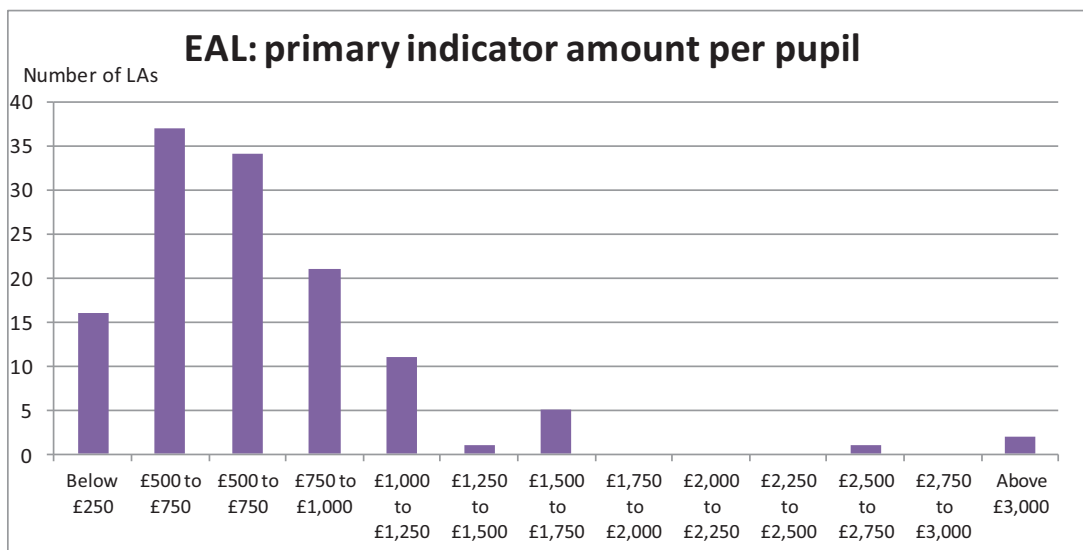
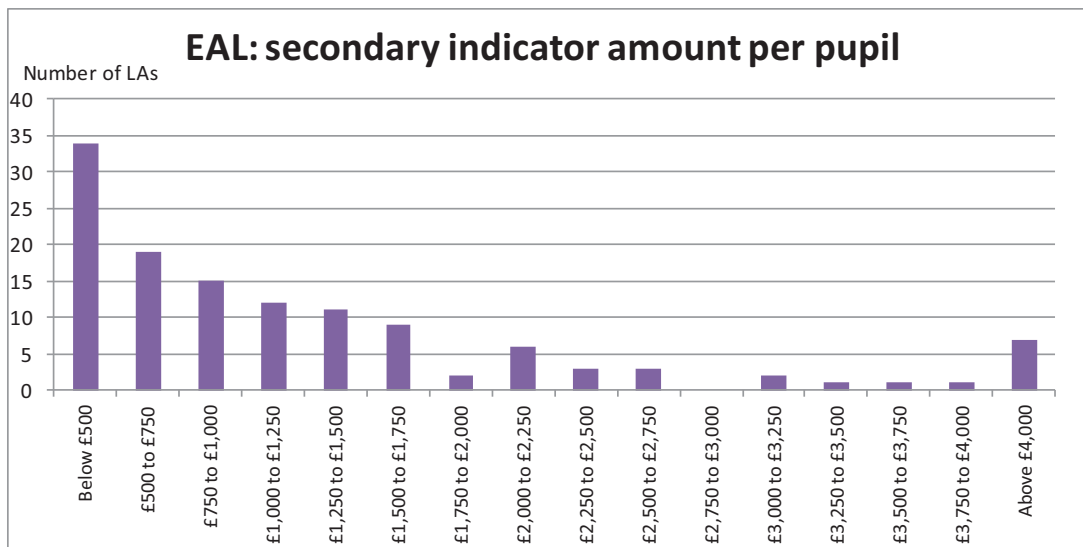
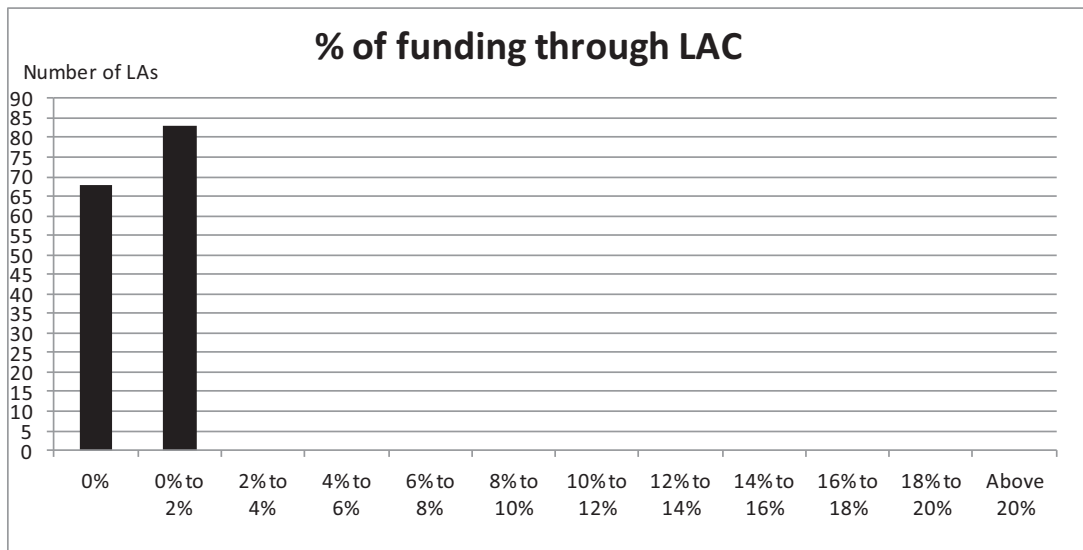
Annex: Details of distribution of the Schools Block

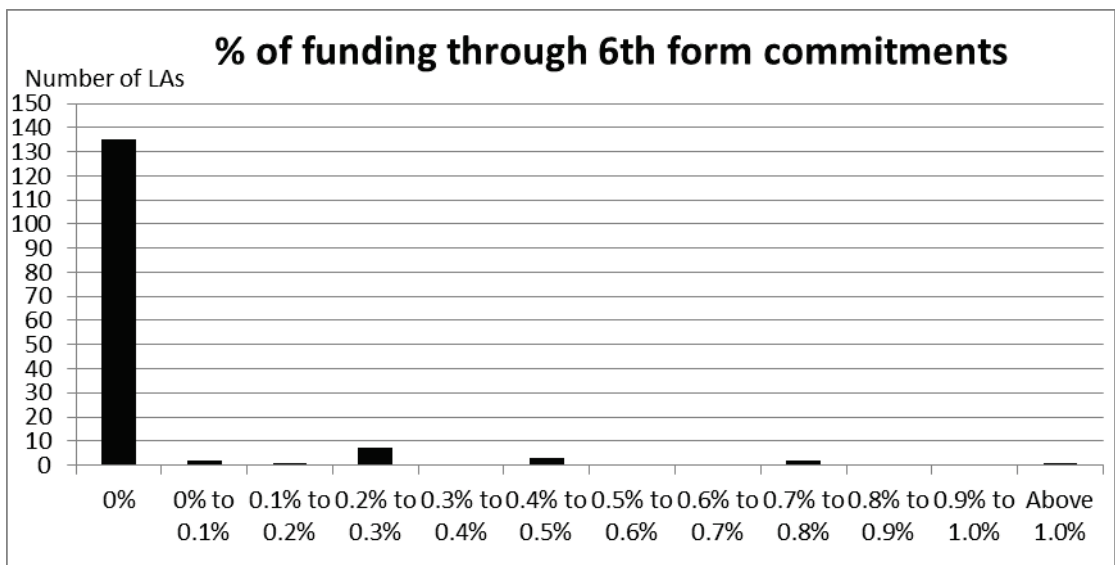
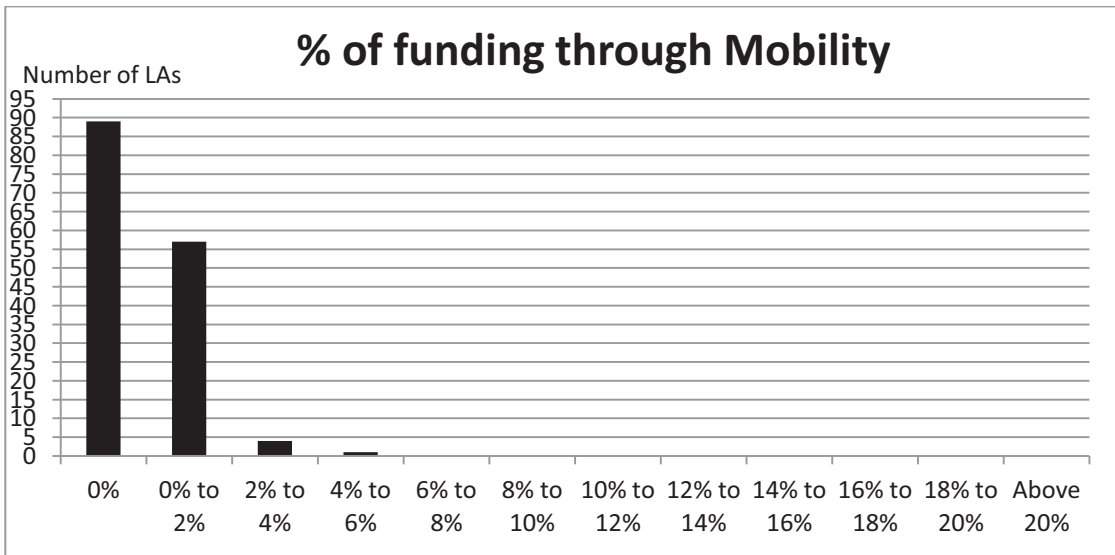
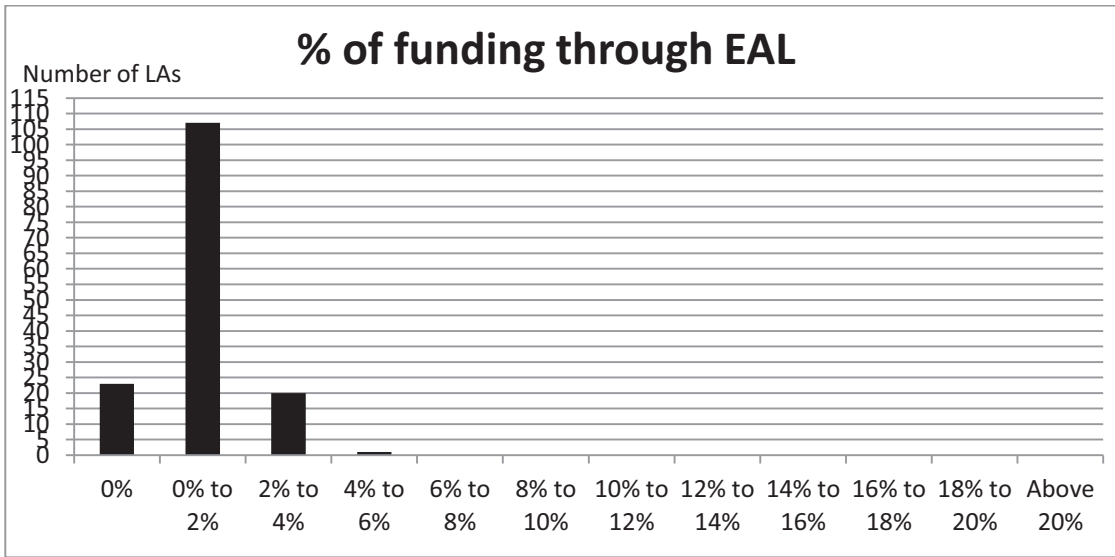


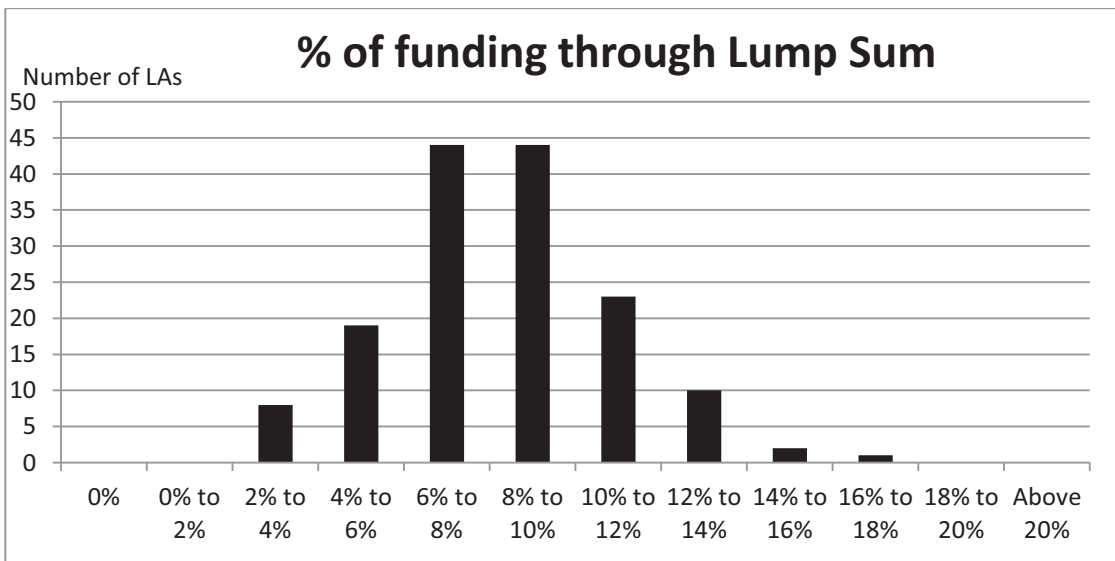
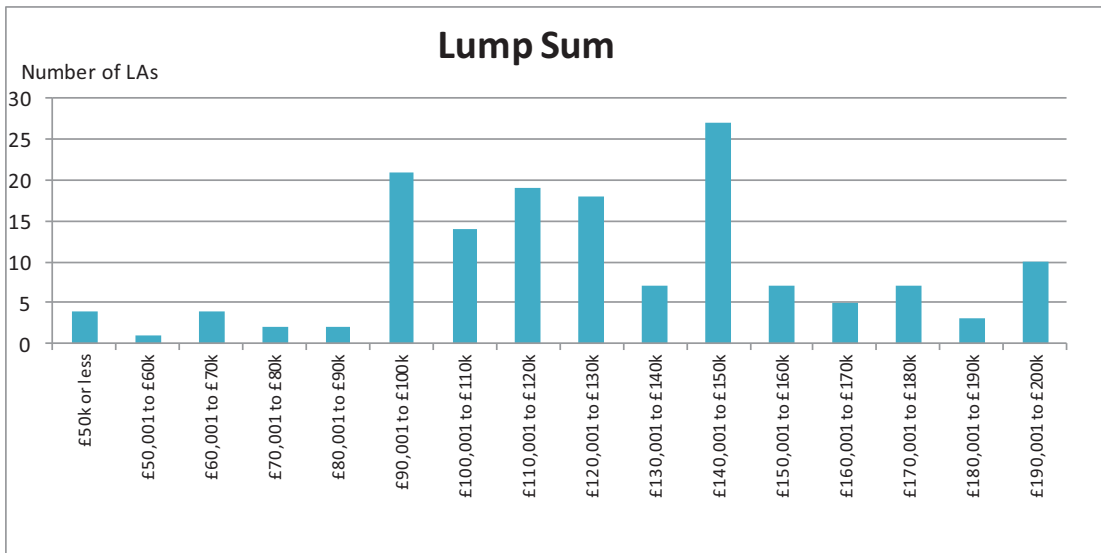
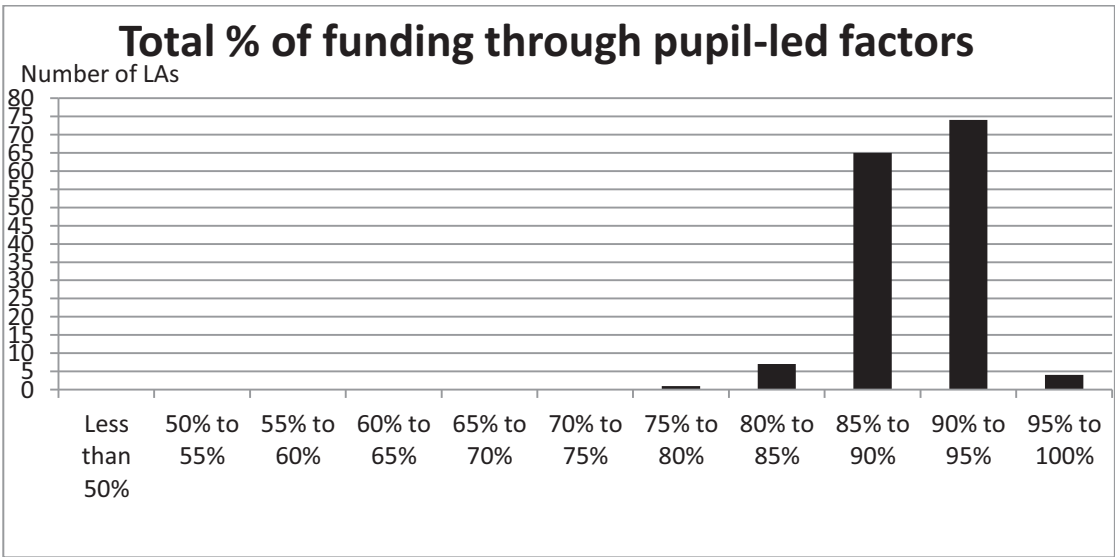


² Per FSM pupil unit amounts were derived by taking the sum total of the funding an LA had allocated through the deprivation factors and dividing it by the number of pupils with FSM in the LA. Data is taken from analysis of the October 2012 submissions. Because this is early data, some schools have had to be excluded from the analysis. Where a large number of schools in one LA have been excluded the whole LA is excluded from the chart











Department
for Education

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Briefing Paper for Schools Forum

14th March 2013

Expectations for SEND Green Paper Pathfinders during the extension period (April 2013-Sept 2014)

Wiltshire Council has Pathfinder Status for the implementation of the SEND Green Paper. The Pathfinder has now been extended until September 2014 and this paper outlines the expectations of pathfinder authorities during that extension period.

DfE has placed explicit requirements on all pathfinders as part of the condition of the grant for the extension of the pathfinder programme. This is to allow more time to refine approaches to assessment and planning, scale up test approaches to whole areas and broader age ranges, and build on new local offers. The extension also enables pathfinders to inform the legislative reforms that are due to come into effect from September 2014.

This briefing note summaries these key requirements.

Overview of key expectations

The anticipated timescale for legislative reform means that Education Health and Care Plans (EHCP), [in Wiltshire this is called a "My Plan"], may need to be offered to all new referrals, including statutory SEN assessments, in all areas as early as September 2014. It is vital that pathfinders lead the way and fully implement new approaches at a quicker pace than other areas. Hence pathfinders are expected to:

- Move rapidly towards the integrated delivery structure that the local authority and its partners will need in order to deliver fully the reforms. Lessons learned in scaling up to authority-wide delivery and the resulting service integration and partnership challenges will provide invaluable lessons for other local authorities.
- From the end of June 2013, offer personal (notional) budgets to all those with a new EHCP.
- From 1st September 2013, offer all new referred children and young people the option of following the integrated assessment and EHCP pathway, rather than the existing Statement of SEN or Learning Disability Assessment (LDA) process (whilst recognising that the protections of the 1996 Education Act continue to apply until new legislation is commenced).
- From September 2013 onwards, work towards converting existing statements and LDAs to the new process where appropriate and where agreed with families and young people. There is currently no fixed deadline for completing conversions, pending national decisions on transitional arrangements for the Children and Families Bill.
- During 2013-14, develop and refine their initial/draft Local Offer (a statement available to all parents describing services that are available and how they may be accessed) due to be published by the end of March 2014, so that by December 2013 it covers as many services as feasibly possible.
- Pathfinders are expected to test across the full age range of 0 - 25 and look to include children and young people with a breadth of different needs, across education, health and social care. Number of cases to be escalated.
- Extensive and routine co-working with schools and early years settings, and commissioners and providers of health services covering all age ranges.
- Continue to report on progress to Mott MacDonald and SQW (DfE consultants). Update Mott MacDonald regularly on progress in moving towards full implementation, share learnings and case studies and publish on LA website detail of cohort of families in pathfinder.

Julia Cramp

Service Director, Commissioning & Performance

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Wiltshire Council

Schools Forum 14th March 2013

Result of the consultation on a revision to the Wiltshire scheme for funding schools in respect of the control of the use of surplus balances

Purpose of the paper

1. To report the result of the consultation on a proposal to revise the Wiltshire scheme for funding schools in respect of the control of the use of surplus balances.

Background and context

2. Consistent with their view that school's are best placed to manage their own resources and should be moving towards greater autonomy, the DfE removed the requirement for LA's to have a mechanism in place to clawback surplus revenue balances, with effect from April 2011. Schools Forum considered this option but resolved that the Controls on Surplus Balances Scheme would continue in 2011/12 and 2012/13 as they felt that it had facilitated informed decision making and increased accountability in schools.
3. The DfE has now announced that they will be asking LA's to provide additional information where they have concerns that public money is not being used with propriety and value for money is not being secured. Significantly they will challenge LA's with 5% of schools that have had a surplus of 15% or more for the last 5 years. An analysis has shown that the level of surplus in Wiltshire maintained schools, whose total net revenue balances have reduced from £13.9m in 2008/09 to £8.76m in 2011/12, would not trigger an enquiry from the DfE.
4. At their meeting on 6th December 2012, Schools Forum considered the future of the Controls on Surplus Balances Scheme beyond the 2012/13 financial year. Key factors in decision making included:
 - i) reducing the burden on schools as they manage the expected turbulence in budgets due to the funding reforms to be implemented in April 2013
 - ii) allowing the LA to fulfil its role of supporting schools in achieving sound financial control
 - iii) recognition of the moral issue of spending funds generated for pupils while they are currently in school
 - iv) the inclusion of unspent Pupil Premium in year end revenue balances
 - v) the reduction in Devolved Formula Capital grant having a direct impact on individual school revenue balances as schools carry forward revenue balances in support of capital projects
 - vi) the removal of the limit set on the sum of General Annual Grant that could be carried forward by an academy
5. A preferred option of withdrawing the Scheme was agreed, to be replaced by a year end statement to schools which would consolidate the existing reporting regime.

This would compare the year end forecast position, as defined on the biannual Income and Expenditure returns, to the actual year end position and would raise awareness of the importance of monitoring by giving an indication of the effectiveness of systems in place in school. The statement would be considered and ratified by the governing body but would not be included on the compliance statement.

6. Schools have been consulted on a proposal that the local authority withdraws the Controls on Surplus Balances Scheme with effect from the 2013/14 financial year and initiates an alternative approach which maintains a balance between encouraging prudent financial management whilst also embracing the DfE's guidance that schools should operate autonomously.

Results of the consultation

7. A summary of the responses received is detailed below:

Phase	Agree	Disagree	Total
Primary	54		54
Secondary	2	1	3
Special	1		1
Total	57	1	58

Comments are included at Appendix 1 attached to this report.

Recommendation

1. That Schools Forum approves a revision to the Wiltshire scheme for funding schools to withdraw the control mechanism on surplus balances with effect from the 2013/14 financial year.

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Appendix 1

Do you agree with the proposal to amend the LA's Scheme for Funding Schools to withdraw the Controls on Surplus Balances Scheme and adopt a more holistic approach which consolidates the existing reporting regime in a year end statement to individual schools on the effectiveness of their monitoring, to be considered and ratified by the governing body?

	Phase	Yes	No	Comments
1	Primary	✓		Greater autonomy and self direction of schools enables creative thinking and long term planning to be considered
2	Primary	✓		Our response is a qualified "yes". Withdrawing the Controls on Surplus Balances Scheme would provide us with welcome flexibility at a time of severe budget restraints (specifically helping us to focus on maintaining appropriate staffing levels in the face of fluctuating numbers on roll). However, in the absence of detail about what controls might replace the scheme, it is difficult to endorse the proposed change whole-heartedly.
3	Primary	✓		The above proposal was discussed at the Finance and Premises Committee on 16 th January 2013. The Governors are happy with the proposal above but internally are considering setting a notional % rollover to be agreed by the Full Governing Body and for this % to be reviewed regularly.
4	Secondary		✓	Schools Forum is well placed to consider this option. They should be congratulated for supervising a systemic check on schools which remind Governing Bodies and Headteachers of the moral issue of spending funds generated for pupils while they are currently in school. Our view is that Wiltshire should continue to show strong leadership in this area and despite there being no statutory obligation to do so, retain the existing Controls on Surplus Balances Scheme in 2013/2014 and beyond. The Schools Forum has noted itself that this position had facilitated informed decision making and has ensured increased accountability by schools for the funds they are provided for the education of pupils by the Local Authority. The facts are that your analysis has shown that the level of surplus in Wiltshire maintained schools, whilst the scheme operated as currently, has reduced the total net revenue balances held by schools from £13.9m in 2008/09 to £8.76m in 2011/12. This is great news. We have no doubt this will, and should continue to drop further in current and future years, but only if the existing scheme is retained in Wiltshire.
5	Secondary	✓		Governors have agreed that they will also be monitoring balances closely to ensure that value for money is achieved

Wiltshire Council

SCHOOL FUNDING WORKING GROUP

March 2013

Free School Meals Pooling Scheme

Purpose of the paper

1. The purpose of the report is to update Schools Forum of the balance on the free schools meals pool.

Background

2. The Free School Meals Pooling Scheme (FSM) was set up in 2001 with the aim of offering schools some financial stability toward the cost of providing free school meals to their pupils. Under the scheme a school can pay a premium into the pool and in return be reimbursed for the full cost of providing statutory free meals to pupils. The scheme has provided a useful means of enabling schools to have some degree of protection against unexpected changes in the number of free meals it has to provide.
3. In recent years any surplus balance within the pool has been redistributed to schools with a small working balance retained in the pool each year. In 2009/10 Schools Forum decided that, in the light of the economic climate, the estimated balance on the pool at the end of 2008/09 should not be redistributed.
4. In 2010/11 £82,689 cashback was redistributed for 2008/09 & 2009/10.
5. In 2011/12 £76,210 cashback was redistributed for 2010/11
6. Currently the premium payable in to the scheme is the amount of notional delegated funding a school receives for free school meals in its budget allocation. The allocation is based on the number of free meals as recorded in the annual spring census

Main Considerations

7. In 2011/12 the balance was distributed to schools pro-rata to each school's contribution as this was agreed to be the fairest method. The basis of any new redistribution needs to be agreed.
8. Whether the whole balance be redistributed or only a proportion. Retention of some of the balance would be used to offset any growth in free meals claims thus reducing the risk that the pool moves into a deficit. Because of the current economic climate it was agreed by Schools Forum in February 2012 that a balance of £80,000 should be retained in the pool to mitigate against an increase in claims.
9. The estimated balance at the end of 2012/13 is £80,096 made up as follows:

		Compared to 2011/12	
Balance b/f	£72,248	Balance b/f	£84,561
Income	£400,826	Income	£392,238
Expenditure	<u>£392,978</u>	Expenditure	<u>£319,518</u>
	£80,096 (surplus)		£157,281 (surplus)

Proposals

10. If Schools Forum wish to make a redistribution of the balance it is proposed that the same methodology used in 2011/12 is applied.
11. That Schools Forum decides how much of the balance should be redistributed. Appendix A shows:

Option 1 = 10%	Cashback £10,104	Leaving £69,991
Option 2 = 20%	Cashback £20,209	Leaving £59,886
Option 3 = 30%	Cashback £30,314	Leaving £49,781
12. In February 2012 Officers believed an increase balance of £80,000 (from £50,000) would be adequate to offset any growth in free meals in 2012/13. As demonstrated using the above percentages all options would leave a balance lower than felt prudent in 2011/12. As a result it is recommended that no cash back be agreed in the current year.
13. On current estimations we will pay out £73,460 more in claims in 2012/13 than in 2011/12. This supports the predictions that due to the current climate claims would increase.

Recommendation

14. Schools Forum is asked to support the recommendation that no cash back be allocated from the Free School Meal Pool in the current year.

CAROLYN GODFREY
Corporate Director

Unpublished documents relied upon in the production of this Report: NONE

Environmental impact of the recommendations contained in this Report: NONE KNOWN

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Free School Meals Pool Rebate: Participating Schools for financial years 2011/12

DfE	Name of School				1. Rebate based on surplus contribution % 60	2. Rebate based on surplus contribution % 70	3. Rebate based on surplus contribution % 80	4. Rebate based on surplus contribution % 100				
2003	Caile Fynamore	£	11,717.64	£	11,332.20	£	385.44	231.26	269.81	308.35	£	385.44
2004	Salisbury Greentrees	£	10,297.32	£	8,929.25	£	1,368.07	820.84	957.65	1,094.46	£	1,368.07
2005	Devizes Nursteed	£	10,297.32	£	9,396.75	£	900.57	540.34	630.40	720.46	£	900.57
2009	Bratton	£	9,587.16	£	5,005.99	£	4,581.17	2,748.70	3,206.82	3,664.94	£	4,581.17
2028	Corsham Primary	£	24,855.60	£	20,181.04	£	4,674.56	2,804.74	3,272.19	3,739.65	£	4,674.56
2029	Corsham Lypiatt	£	2,485.56	£	2,077.57	£	407.99	244.79	285.59	326.39	£	407.99
2031	Neston	£	3,195.72	£	1,035.98	£	2,159.74	1,295.84	1,511.82	1,727.79	£	2,159.74
2032	Corsham Regis	£	14,558.28	£	12,111.99	£	2,446.29	1,467.77	1,712.40	1,957.03	£	2,446.29
2037	Devizes Southbroom Infant	£	20,949.72	£	15,709.87	£	5,239.85	3,143.91	3,667.90	4,191.88	£	5,239.85
2053	Horningsham	£	1,420.32	£	637.67	£	782.65	469.59	547.86	626.12	£	782.65
2086	Stanton St. Quintin	£	2,485.56	£	1,782.11	£	703.45	422.07	492.42	562.76	£	703.45
2140	Wootton Bassett Infants	£	3,195.72	£	2,122.45	£	1,073.27	643.96	751.29	858.62	£	1,073.27
2162	Wootton Bassett Noremars Junior	£	4,971.12	£	2,425.39	£	2,545.73	1,527.44	1,782.01	2,036.58	£	2,545.73
2184	Wootton Bassett Longleaze	£	9,232.08	£	5,424.87	£	3,807.21	2,284.33	2,665.05	3,045.77	£	3,807.21
2190	Salisbury Woodlands	£	20,949.72	£	17,419.05	£	3,530.67	2,118.40	2,471.47	2,824.54	£	3,530.67
2196	Trowbridge Holbrook	£	8,877.00	£	7,633.34	£	1,243.66	746.20	870.56	994.93	£	1,243.66
2202	Cricklade St. Sampson's Infant	£	3,905.88	£	3,113.55	£	792.33	475.40	554.63	633.86	£	792.33
2218	Chippenham Kings Lodge	£	4,616.04	£	4,194.41	£	421.63	252.98	295.14	337.30	£	421.63
2222	Trowbridge Walwayne Court	£	10,652.40	£	6,247.67	£	4,404.73	2,642.84	3,083.31	3,523.78	£	4,404.73
2225	Westbury Bitham Brook	£	12,782.88	£	9,469.68	£	3,313.20	1,987.92	2,319.24	2,650.56	£	3,313.20
3019	Broad Town C.E.	£	1,065.24	£	835.89	£	229.35	137.61	160.55	183.48	£	229.35
3040	Colerne C.E.	£	2,130.48	£	1,163.14	£	967.34	580.40	677.14	773.87	£	967.34
3047	Crockerton C.E.	£	1,065.24	£	888.25	£	176.99	106.19	123.89	141.59	£	176.99
3086	Heddington C.E.	£	710.16	£	671.33	£	38.83	23.30	27.18	31.06	£	38.83
3088	Hilperton C.E.	£	6,391.44	£	3,665.20	£	2,726.24	1,635.74	1,908.37	2,180.99	£	2,726.24
3135	North Bradley C.E	£	4,260.96	£	3,281.85	£	979.11	587.47	685.38	783.29	£	979.11
3150	Purton St. Mary's C.E.	£	7,101.60	£	2,629.22	£	4,472.38	2,683.43	3,130.67	3,577.90	£	4,472.38
3160	Semington St George's C.E.	£	2,485.56	£	1,634.38	£	851.18	510.71	595.83	680.94	£	851.18
3161	Shalbourne C.E.	£	1,420.32	£	1,208.02	£	212.30	127.38	148.61	169.84	£	212.30
3162	Shaw C.E.	£	1,065.24	£	67.32	£	997.92	598.75	698.54	798.34	£	997.92
3163	Sherston C.E.	£	2,485.56	£	1,843.82	£	641.74	385.04	449.22	513.39	£	641.74
3172	Stratford sub Castle C.E.	£	10,652.40	£	1,505.35	£	9,147.05	5,488.23	6,402.94	7,317.64	£	9,147.05
3201	Winterbourne Earls C.E.	£	3,195.72	£	2,028.95	£	1,166.77	700.06	816.74	933.42	£	1,166.77
3203	Wootton Bassett St.Bartholomew's C.E.	£	11,717.64	£	8,098.97	£	3,618.67	2,171.20	2,533.07	2,894.94	£	3,618.67
3207	Dilton Marsh C.E.	£	12,782.88	£	8,054.09	£	4,728.79	2,837.27	3,310.15	3,783.03	£	4,728.79
3216	Marlborough St.Peter's CEJunior	£	13,137.96	£	7,150.88	£	5,987.08	3,592.25	4,190.96	4,789.66	£	5,987.08
3220	Minety C.E.	£	355.08	£	190.74	£	164.34	98.60	115.04	131.47	£	164.34
3222	Market Lavington St. Barnabas' C.E.	£	6,746.52	£	4,308.48	£	2,438.04	1,462.82	1,706.63	1,950.43	£	2,438.04
3243	Great Bedwyn C.E.	£	2,130.48	£	1,817.64	£	312.84	187.70	218.99	250.27	£	312.84
3330	Derry Hill C.E.	£	4,260.96	£	3,779.27	£	481.69	289.01	337.18	385.35	£	481.69
3331	Devizes St Peter's C.E.	£	4,971.12	£	4,388.89	£	582.23	349.34	407.56	465.78	£	582.23
3366	Morgan's Vale and Woodfalls C.E.	£	2,840.64	£	1,795.20	£	1,045.44	627.26	731.81	836.35	£	1,045.44
3407	Woodford Valley C.E.	£	3,550.80	£	2,821.83	£	728.97	437.38	510.28	583.18	£	728.97
3453	Chilmark C.E.	£	355.08	£	-	£	355.08	213.05	248.56	284.06	£	355.08
3457	Somerfords Walter Powell	£	1,065.24	£	276.76	£	788.48	473.09	551.94	630.78	£	788.48
3462	Amesbury Archer	£	9,232.08	£	5,752.12	£	3,479.96	2,087.98	2,435.97	2,783.97	£	3,479.96
3467	Churchfields The Village School	£	3,905.88	£	2,732.07	£	1,173.81	704.29	821.67	939.05	£	1,173.81
3470	Wilton/Barford	£	8,521.92	£	8,024.17	£	497.75	298.65	348.43	398.20	£	497.75
5200	Aloeric	£	11,362.56	£	10,563.63	£	798.93	479.36	559.25	639.14	£	798.93
5222	Rowde	£	7,101.60	£	4,957.37	£	2,144.23	1,286.54	1,500.96	1,715.38	£	2,144.23
7008	Salisbury Exeter House	£	7,667.83	£	3,856.28	£	3,811.55	2,286.93	2,668.09	3,049.24	£	3,811.55
7010	Trowbridge Larkrise	£	5,649.98	£	5,128.28	£	521.70	313.02	365.19	417.36	£	521.70
								60,689.39	70,804.29	80,919.19		101,148.99

Free School Meals Pool Rebate: Participating Schools for financial years 2011/12

DFE	Name of School	Total Subscriptions	Total Claims	Balance	1.	2.	3.	4.	4a Interest	check column with column 4
					Rebate based on surplus contribution %	Rebate based on surplus contribution %	Rebate based on surplus contribution %	Rebate based on surplus contribution %		
					10	20	30	100		
2003	Calne Fynamore	£ 11,717.64	£ 11,332.20	£ 385.44	38.54	77.09	115.63	£ 385.44	£ -	£ 385.44
2004	Salisbury Greentrees	£ 10,297.32	£ 8,929.25	£ 1,368.07	136.81	273.61	410.42	£ 1,368.07	£ -	£ 1,368.07
2005	Devizes Nursted	£ 10,297.32	£ 9,396.75	£ 900.57	90.06	180.11	270.17	£ 900.57	£ -	£ 900.57
2009	Bratton	£ 9,587.16	£ 5,005.99	£ 4,581.17	458.12	916.23	1,374.35	£ 4,581.17	£ -	£ 4,581.17
2028	Corsham Primary	£ 24,855.60	£ 20,181.04	£ 4,674.56	467.46	934.91	1,402.37	£ 4,674.56	£ -	£ 4,674.56
2029	Corsham Lypiatt	£ 2,485.56	£ 2,077.57	£ 407.99	40.80	81.60	122.40	£ 407.99	£ -	£ 407.99
2031	Neston	£ 3,195.72	£ 1,035.98	£ 2,159.74	215.97	431.95	647.92	£ 2,159.74	£ -	£ 2,159.74
2032	Corsham Regis	£ 14,558.28	£ 12,111.99	£ 2,446.29	244.63	489.26	733.89	£ 2,446.29	£ -	£ 2,446.29
2037	Devizes Southbroom Infant	£ 20,949.72	£ 15,709.87	£ 5,239.85	523.98	1,047.97	1,571.96	£ 5,239.85	£ -	£ 5,239.85
2045	Gomeldon	£ -	£ -	£ -	0.00	0.00	0.00	£ -	£ -	£ -
2053	Horningsham	£ 1,420.32	£ 637.67	£ 782.65	78.27	156.53	234.80	£ 782.65	£ -	£ 782.65
2086	Stanton St. Quintin	£ 2,485.56	£ 1,782.11	£ 703.45	70.35	140.69	211.04	£ 703.45	£ -	£ 703.45
2091	Salisbury Harnham Infant	£ 3,195.72	£ 3,827.89	£ -	0.00	0.00	0.00	£ -	£ -	£ -
2140	Wootton Bassett Infants	£ 3,195.72	£ 2,122.45	£ 1,073.27	107.33	214.65	321.98	£ 1,073.27	£ -	£ 1,073.27
2162	Wootton Bassett Noremarsch Junior	£ 4,971.12	£ 2,425.39	£ 2,545.73	254.57	509.15	763.72	£ 2,545.73	£ -	£ 2,545.73
2178	Warmminster Princeroft	£ 6,746.52	£ 7,569.76	£ -	0.00	0.00	0.00	£ -	£ -	£ -
2184	Wootton Bassett Longleaze	£ 9,232.08	£ 5,424.87	£ 3,807.21	380.72	761.44	1,142.16	£ 3,807.21	£ -	£ 3,807.21
2190	Salisbury Woodlands	£ 20,949.72	£ 17,419.05	£ 3,530.67	353.07	706.13	1,059.20	£ 3,530.67	£ -	£ 3,530.67
2196	Trowbridge Holbrook	£ 8,877.00	£ 7,633.34	£ 1,243.66	124.37	248.73	373.10	£ 1,243.66	£ -	£ 1,243.66
2198	Ludwell	£ 2,485.56	£ 3,117.29	£ -	0.00	0.00	0.00	£ -	£ -	£ -
2202	Cricklade St. Sampson's Infant	£ 3,905.88	£ 3,113.55	£ 792.33	79.23	158.47	237.70	£ 792.33	£ -	£ 792.33
2218	Chippenham Kings Lodge	£ 4,616.04	£ 4,194.41	£ 421.63	42.16	84.33	126.49	£ 421.63	£ -	£ 421.63
2222	Trowbridge Walwayne Court	£ 10,652.40	£ 6,247.67	£ 4,404.73	440.47	880.95	1,321.42	£ 4,404.73	£ -	£ 4,404.73
2225	Westbury Bitham Brook	£ 12,782.88	£ 9,469.68	£ 3,313.20	331.32	662.64	993.96	£ 3,313.20	£ -	£ 3,313.20
3013	Box C.E.	£ 2,485.56	£ 2,621.74	£ -	0.00	0.00	0.00	£ -	£ -	£ -
3018	Broad Hinton C.E.	£ 710.16	£ 751.74	£ -	0.00	0.00	0.00	£ -	£ -	£ -
3019	Broad Town C.E.	£ 1,065.24	£ 835.89	£ 229.35	22.94	45.87	68.81	£ 229.35	£ -	£ 229.35
3021	Broughton Gifford C.E.	£ 1,775.40	£ 1,922.36	£ -	0.00	0.00	0.00	£ -	£ -	£ -
3035	Cherhill C.E.	£ 3,195.72	£ 3,511.86	£ -	0.00	0.00	0.00	£ -	£ -	£ -
3038	Christian Malford C.E.	£ -	£ 854.59	£ -	0.00	0.00	0.00	£ -	£ -	£ -
3040	Coleme C.E.	£ 2,130.48	£ 1,163.14	£ 967.34	96.73	193.47	290.20	£ 967.34	£ -	£ 967.34
3047	Crockerton C.E.	£ 1,065.24	£ 888.25	£ 176.99	17.70	35.40	53.10	£ 176.99	£ -	£ 176.99
3086	Heddington C.E.	£ 710.16	£ 671.33	£ 38.83	3.88	7.77	11.65	£ 38.83	£ -	£ 38.83
3088	Hilperton C.E.	£ 6,391.44	£ 3,665.20	£ 2,726.24	272.62	545.25	817.87	£ 2,726.24	£ -	£ 2,726.24
3091	Hullavington C.E.	£ 1,065.24	£ 1,568.93	£ -	0.00	0.00	0.00	£ -	£ -	£ -
3104	Lea & Garsdon C.E.	£ 710.16	£ 1,424.94	£ -	0.00	0.00	0.00	£ -	£ -	£ -
3135	North Bradley C.E.	£ 4,260.96	£ 3,281.85	£ 979.11	97.91	195.82	293.73	£ 979.11	£ -	£ 979.11
3140	Oaksey C.E.	£ 710.16	£ 805.97	£ -	0.00	0.00	0.00	£ -	£ -	£ -
3150	Purton St. Mary's C.E.	£ 7,101.60	£ 2,629.22	£ 4,472.38	447.24	894.48	1,341.71	£ 4,472.38	£ -	£ 4,472.38
3160	Semington St George's C.E.	£ 2,485.56	£ 1,634.38	£ 851.18	85.12	170.24	255.35	£ 851.18	£ -	£ 851.18
3161	Shalbourne C.E.	£ 1,420.32	£ 1,208.02	£ 212.30	21.23	42.46	63.69	£ 212.30	£ -	£ 212.30
3162	Shaw C.E.	£ 1,065.24	£ 67.32	£ 997.92	99.79	199.58	299.38	£ 997.92	£ -	£ 997.92
3163	Sherston C.E.	£ 2,485.56	£ 1,843.82	£ 641.74	64.17	128.35	192.52	£ 641.74	£ -	£ 641.74
3172	Stratford sub Castle C.E.	£ 10,652.40	£ 1,505.35	£ 9,147.05	914.71	1,829.41	2,744.12	£ 9,147.05	£ -	£ 9,147.05
3174	Sutton Veny C.E.	£ -	£ -	£ -	0.00	0.00	0.00	£ -	£ -	£ -
3191	Warmminster Minster C.E.	£ 4,971.12	£ 5,316.41	£ -	0.00	0.00	0.00	£ -	£ -	£ -
3199	Winsley C.E.	£ 710.16	£ 1,668.04	£ -	0.00	0.00	0.00	£ -	£ -	£ -
3201	Winterbourne Earls C.E.	£ 3,195.72	£ 2,028.95	£ 1,166.77	116.68	233.35	350.03	£ 1,166.77	£ -	£ 1,166.77
3203	Wootton Bassett St.Bartholomew's C.E.	£ 11,717.64	£ 8,098.97	£ 3,618.67	361.87	723.73	1,085.60	£ 3,618.67	£ -	£ 3,618.67
3207	Dilton Marsh C.E.	£ 12,782.88	£ 8,054.09	£ 4,728.79	472.88	945.76	1,418.64	£ 4,728.79	£ -	£ 4,728.79
3216	Marlborough St.Peter's CEJunior	£ 13,137.96	£ 7,150.88	£ 5,987.08	598.71	1,197.42	1,796.12	£ 5,987.08	£ -	£ 5,987.08
3220	Miney C.E.	£ 355.08	£ 190.74	£ 164.34	16.43	32.87	49.30	£ 164.34	£ -	£ 164.34
3222	Market Lavington St. Barnabas' C.E.	£ 6,746.52	£ 4,308.48	£ 2,438.04	243.80	487.61	731.41	£ 2,438.04	£ -	£ 2,438.04
3242	Brinkworth	£ 1,775.40	£ 1,795.20	£ -	0.00	0.00	0.00	£ -	£ -	£ -
3243	Great Bedwyn C.E.	£ 2,130.48	£ 1,817.64	£ 312.84	31.28	62.57	93.85	£ 312.84	£ -	£ 312.84
3330	Derry Hill C.E.	£ 4,260.96	£ 3,779.27	£ 481.69	48.17	96.34	144.51	£ 481.69	£ -	£ 481.69
3331	Devizes St Peter's C.E.	£ 4,971.12	£ 4,388.89	£ 582.23	58.22	116.45	174.67	£ 582.23	£ -	£ 582.23
3366	Morgan's Vale and Woodfalls C.E.	£ 2,840.64	£ 1,795.20	£ 1,045.44	104.54	209.09	313.63	£ 1,045.44	£ -	£ 1,045.44
3388	Seend C.E.	£ 1,775.40	£ 2,143.02	£ -	0.00	0.00	0.00	£ -	£ -	£ -
3400	West Ashton C.E.	£ 355.08	£ 368.39	£ -	0.00	0.00	0.00	£ -	£ -	£ -
3402	Whiteparish	£ 355.08	£ 396.44	£ -	0.00	0.00	0.00	£ -	£ -	£ -
3407	Woodford Valley C.E.	£ 3,550.80	£ 2,821.83	£ 728.97	72.90	145.79	218.69	£ 728.97	£ -	£ 728.97
3449	Broad Chalke C.E.	£ 710.16	£ 1,226.72	£ -	0.00	0.00	0.00	£ -	£ -	£ -
3453	Chilmark C.E.	£ 355.08	£ -	£ 355.08	35.51	71.02	106.52	£ 355.08	£ -	£ 355.08
3456	Great Cheverell The Holy Trinity C.E.	£ 710.16	£ 1,503.48	£ -	0.00	0.00	0.00	£ -	£ -	£ -
3457	Somerfords Walter Powell	£ 1,065.24	£ 276.76	£ 788.48	78.85	157.70	236.54	£ 788.48	£ -	£ 788.48
3460	Alderbury and West Grimstead C.E.	£ 3,195.72	£ 4,233.68	£ -	0.00	0.00	0.00	£ -	£ -	£ -
3462	Amesbury Archer	£ 9,232.08	£ 5,752.12	£ 3,479.96	348.00	695.99	1,043.99	£ 3,479.96	£ -	£ 3,479.96
3464	Old Sarum Primary	£ -	£ 2,180.42	£ -	0.00	0.00	0.00	£ -	£ -	£ -
3467	Churchfields The Village School	£ 3,905.88	£ 2,732.07	£ 1,173.81	117.38	234.76	352.14	£ 1,173.81	£ -	£ 1,173.81
3470	Wilton/Barford	£ 8,521.92	£ 8,024.17	£ 497.75	49.78	99.55	149.33	£ 497.75	£ -	£ 497.75
3471	Lyneham Primary	£ 2,130.48	£ 2,294.49	£ -	0.00	0.00	0.00	£ -	£ -	£ -
5200	Aloric	£ 11,362.56	£ 10,563.63	£ 798.93	79.89	159.79	239.68	£ 798.93	£ -	£ 798.93
5222	Rowde	£ 7,101.60	£ 4,957.37	£ 2,144.23	214.42	428.85	643.27	£ 2,144.23	£ -	£ 2,144.23
7008	Salisbury Exeter House	£ 7,667.83	£ 3,856.28	£ 3,811.55	381.16	762.31	1,143.47	£ 3,811.55	£ -	£ 3,811.55
7010	Trowbridge Larkrise	£ 5,649.98	£ 5,128.28	£ 521.70	52.17	104.34	156.51	£ 521.70	£ -	£ 521.70
76		392,188.17	302,473.58	101,048.99	10,104.90	20,209.80	30,314.70	101,048.99	0.00	101,048.99

10%	
Estimated Reserves as at 31/3/13	-80,096.09
Rebate 1	10,104.90
Closed schools portion to offset closed schools with deficits	0.00
Balance retained in pool	-69,991.19

For rebate above 100% - NOT NEEDED THIS TIME	
Estimated Reserves as at 31/3/13	-80,096.09
Rebate 4	101,048.99
Closed schools portion to offset closed schools with deficits	0.00
Balance retained in pool	20,952.90

20%	
Estimated Reserves as at 31/3/13	-80,096.09
Rebate 2	20,209.80
Closed schools portion to offset closed schools with deficits	0.00
Balance retained in pool	-59,886.29

Ideal balance to retain £50,000

30%	
Estimated Reserves as at 31/3/13	-80,096.09
Rebate 3	30,314.70
Closed schools portion to offset closed schools with deficits	0.00
Balance retained in pool	-49,781.39