

Wiltshire Council

**Schools Forum
6th December 2012**

Report from the High Needs Formula Review Group

Purpose of report

1. To report on the meeting of the High Needs Formula Review Group held on 20th November 2012 and to make recommendations on the principles to be incorporated in to the calculation of top up values for specialist provision.

Main considerations for School Forum

2. The draft minutes of the meeting are attached at Appendix 1.
3. Schools Forum had previously agreed that this formula review group should continue to be in place in order to develop proposals for the implementation of school funding reform for high needs provision, ie., special schools, resource bases and enhanced learning provision (ELP). The SEN Working Group would normally meet to consider proposals from this group prior to reporting to Schools Forum however on this occasion the SEN Group meeting did not take place and the recommendations from the group are therefore reported directly to Schools Forum.
4. The group considered a number of issues relating to the calculation of top up values for pupils in special schools, resource bases and in receipt of ELP.

Specialism funding in special schools

5. Following the mainstreaming of standards funds in 2011-12 specialism funding received by secondary schools was incorporated into the main funding formula and is now allocated across all secondary schools within the age weighted pupil unit of funding (AWPU). Schools Forum agreed that for special schools specialism funding would continue to be allocated to those schools which had achieved specialism status (3 out of the 6 schools). Two schools had received funding for a single specialism and 1, Springfields Academy, had received funding for two specialisms.
6. Under the place plus funding mechanism funding can only be allocated to special schools as part of the top up value, or to fund a specific service or activity. It is therefore necessary to determine whether the specialism funding is to be incorporated in to the top up values or allocated for specific activities.
7. Following discussion, the group recommends that the funding for 3 specialisms should be incorporated in to the overall budget for top up values and that for 2013-14 Springfields Academy should continue to be allocated funding for the activity associated with the second specialism. From 2014-15 funding for all specialisms should be included within the funding for top up values.

Turbulence/In Year Pupil Movement

8. Modelling of in year pupil movement within special schools had demonstrated that funding of pupils in “real time” could have a significant impact on the funding received by a school in any year. As a result the possibility of including an additional amount within the top up value to reflect turbulence has been discussed.
9. For resource bases financial modelling has indicated that in year pupil movement has a less significant effect on the overall funding for the setting. This is to be expected as the top up funding represents a much smaller proportion of the overall cost of a place.
10. It is recommended by the group that a turbulence factor be incorporated in to the calculation of the top up value for special schools but not for top up values in resource bases or ELP.
11. The potential risk of incorporating a turbulence element is that a school could be “over funded” if it is full for most of the year and the final value of top ups for each band will be agreed by Schools Forum at the January meeting when the values are considered alongside planned place numbers and overall funding levels.
12. It is also recommended that turbulence within all settings should be mitigated through the agreed payment dates for pupils who start or leave during the year. It is therefore recommended that payments start and end as follows:
 - a. Pupils who leave because they reach the end of their school career, ie., end of year 11 or year 6 (in a resource base) will be funded until the end of the academic year.
 - b. In year leavers who leave before the 15th of the month will be funded until the end of the calendar month.
 - c. In year leavers who leave after the 15th of the month will be funded until the end of the following calendar month.
 - d. It was further agreed that in year starters would be funded from the beginning of the calendar month of admission.
13. This funding schedule will apply to special schools, resource bases and ELP.

Proposals

14. That the recommendations of the High Needs Formula Review Group are accepted in order to allow calculation of top up values to be completed and final proposals brought to Schools Forum in January 2013. The recommendations are as follows:
 - a) That for special schools the funding for 3 specialisms should be incorporated in to the overall budget for top up values and that for 2013-14 Springfields Academy should continue to be allocated funding for the activity associated with the second specialism. From 2014-15 funding for all specialisms should be included within the funding for top up values.
 - b) That a turbulence factor be incorporated in to the calculation of the top up value for special schools but not for top up values in resource bases or ELP.

- c) That the payment schedule for in year starters and leavers outlined in paragraph 12 be adopted for special schools, resource bases and ELP.

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