

AGENDA

Meeting: Schools Forum
Place: Melksham Town Hall, Market Place, Melksham, Wilts. SN12 6ES
Date: Thursday 18 October 2012
Time: 1.30 pm

Briefing Arrangements:

Briefing will be held at 11.00 am in Melksham Town Hall and will focus on Schools Funding Reform issues.

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	WASSH, Melksham Oak Community School
Mrs A Ferries	WGA, Primary Governor Representative
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	WASSH, 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 - 8*)

To approve and sign as a correct record the minutes of the meeting held on **4 October 2012** (copy attached)

3 Declaration of Interests

To receive any declarations of pecuniary or non-pecuniary interests.

4 Chairman's Announcements

5 Schools Forum Terms of Reference (*Pages 9 - 18*)

To agree the new Terms of Reference for the Schools Forum following the publication of the new Schools Forums (England) Regulations 2012 and which came into effect on 1 October 2012.

6 Schools Funding Reform (*Pages 19 - 34*)

To agree the funding formula which will be submitted to the Education Funding Agency by 31 October 2012.

7 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

SCHOOLS FORUM

DRAFT MINUTES OF THE SCHOOLS FORUM MEETING HELD ON 4 OCTOBER 2012 AT MELKSHAM TOWN HALL, MARKET PLACE, MELKSHAM, WILTS. SN12 6ES.

Present:

Mr N Baker, Dr Peter Biggs, Mrs Julia Bird, Mr Andy Bridewell, Mr Steve Clark, Mrs A Ferries, Mrs Jane Franchi, Jan Hatherell, Mr J Hawkins, Mrs Sue Jiggins, Mr M Keeling, Mr J Proctor, Mr Martin Watson and Mrs C Williamson

Also Present:

Julia Cramp, Service Director Commissioning and Performance, Cllr Lionel Grundy OBE and Mr Ted Hatala

21 Election of Chairman

Resolved:

To elect Mr N Baker Chairman for the ensuing year.

Mr N Baker in the Chair

22 Election of Vice-Chairman

Resolved:

To elect Mr M Watson Vice-Chairman for the ensuing year.

23 Apologies and Changes of Membership

Apologies were received from:

Mrs Ingrid Sidmouth – SEN sector, Rowdeford School
Rev. Alice Kemp – SEN Governor representative
Dr Tina Pagett – 14-19 Group representative

And also:

Stephanie Denovan – Service Director, Schools and Learning
Carolyn Godfrey – Corporate Director
Councillor Laura Mayes – Portfolio Holder, Children's Services
Rosheen Ryan – Parent Governor representative

Changes to membership:

Ms Jan Hatherell replaces Mr David Cowley as Academy representative

24 Minutes of the previous Meeting

Resolved:

To approve and sign as a correct record the minutes from the meeting held on 13 July 2012.

25 Declaration of Interests

There were no declarations of interest.

26 Chairman's Announcements

The Chairman noted the change in venue due to the refurbishment of Old County Hall in Trowbridge and asked members to feedback to either Liz Williams or Kirsty Butcher on its suitability.

27 Children and Young People's Trust Board Update

Julia Cramp, Service Director Commissioning and Performance gave a brief update.

The "Bouncing Back" conference in September was very successful, and saw the launch of a new resource directory on support for children and young people with emotional and mental health difficulties, and also a mental health charter developed by young people which they are keen for schools to sign up to.

Meetings are scheduled with both PHF and WASSH to discuss the mental health charter and also the new model policy for schools on self harm which has been developed by a multi-agency group including school representatives and CAMHS.

Work has continued on revising the multi-agency thresholds document which was signed off by the LSCB and the Children's Trust last year. This document includes information about social care thresholds. Some changes had been made to the Children's Social Care Referral and Assessment Team and it is hoped that this will result in better communication and dialogue with referrers.

28 Budget Monitoring

Liz Williams, Head of Finance introduced the report which gave the position as at the end of August 2012.

Key area highlighted were the under spend in both the independent special schools placement and early years free entitlement for 3 and 4 year olds, and the significant overspend in maternity costs.

Resolved:

To note the report.

29 Reports from Working Groups

Liz Williams introduced the report and minutes from the Schools Funding Working Group, SEN Working Group and Early Years Reference Group, and noted that the minutes for the Early Years Reference Group were not attached to the agenda but circulated at the meeting and attached to these minutes.

She highlighted that the Minimum Funding Guarantee Exceptions 2013/14 report had been considered by the Schools Funding Working Group and their recommendations used to complete the submission within the deadline of 30 September 2012.

The Forum's attention was drawn to the recommendations from the Early Years Reference Group with respect to the Early Years Single Funding Formula.

Resolved

To note the reports.

30 Update on SEN Green Paper Pathfinder/DCA review and Personal Budgets

Julia Cramp, Service Director Commissioning and Performance provided a verbal update and informed the Forum that the Green Paper had now been followed by draft legislation. She explained that Wiltshire Council was one of twenty pathfinders and that the single assessment process was currently being piloted. She drew attention to the potential for personal budgets, including direct payments. She confirmed that there was currently no published directory of providers from whom families taking direct payments could purchase their own support.

In response to questions she confirmed that Early Years SEN (Inclusion Advisors) were part of the pilot and that further information was available through Susan Tanner, Head of Commissioning or Nicholas Breakwell, Interim Head of Service for the pilot project. The draft legislation is clear that in the future there should be both joint commissioning and joint provision across education, health and social care.

It was agreed that a report on the pilot would be brought to the Schools Forum on 24 January 2013.

31 Young People's Support Service Update

Liz Williams introduced the report and invited questions.

Concern was raised over the number and variety of alternate providers and the feedback through the NFER questionnaire not being used by all schools, however this had been partially addressed through changes to the spreadsheet.

Resolved:

To bring an update back to the Schools Forum meeting on 6 December 2012.

32 Schools Revenues Balances 2011-12

Liz Williams, Head of Finance introduced the report which provided the annual update and showed that whilst the number of schools in deficit had decreased the value had increased, although this was due to one school and did not present a significant risk.

In response to questions she explained that deficits needed an agreed recovery plan which had to be signed off by the Chief Finance Officer, the deficit was financed by the local authority (Wiltshire Council) and recovered through the plan and that it was subject to great scrutiny. Clarity was sought over Academy conversions and she confirmed that if schools converted through the new method (Good / Outstanding) the deficit was taken and plan agreed with the Education Funding Agency (EFA) who reimbursed the local authority. If schools converted through sponsors the local authority inherited the deficit. She also explained that should a school close any surplus or deficit would come back to the local authority, and should schools federate or amalgamate any surplus would be kept by the new school or any deficit would be inherited by the local authority.

Resolved:

To note the report.

33 The Early Years Single Funding Formula - extension to 2 year olds

Simon Burke, Head of Business and Commercial Services introduced the report and explained that the recommendations would form the basis for consultation.

He drew attention to the feedback given to the Education Funding Agency (EFA) detailed in paragraph 14.

He clarified that the suggested amendments were to the rate for 2 year olds and this was what would be consulted on.

A discussion followed where concern was raised over affordability as money received from the Government may not cover the full amount and it could impact on the dedicated schools grant.

Resolved:

- i. To apply the methodology of the existing Early Years Single Funding Formula (EYSFF) to calculate the hour rates for two year olds;**
- ii. To amend the EYSFF to add an element for consumable toiletries in respect of two year olds;**
- iii. To amend the EYSFF staffing model with a staff:children ratio of 1:4 in respect of provision for two year olds;**
- iv. To adopt a single hourly rate for all private/voluntary/independent settings providing free entitlement childcare for two year olds;**

- v. **That the hourly rate paid to childminders be consistent with that for three and four year olds**
- vi. **To incorporate a deprivation supplement into the basic hourly rate for two year olds (if allowed by regulations);**
- vii. **To approve the principle of applying the existing EYSFF, with the amendments above; be subject to consultation with all providers of free entitlement childcare for two year olds; and**
- viii. **To note concerns over affordability and bring costings of potential issues to the Schools Forum meeting being held on 6 December 2012.**

34 Schools Funding Reform - workplan to address implementation of funding changes for high needs pupils

Liz Williams, Head of Finance introduced the report which detailed the work needed around high needs pupils and drew attention to an error in paragraph 4 bullet point 2, which should read:

- The place plus methodology is to be implemented for all specialist provision including maintained and academy provision.

It was explained that a distinction was needed between pre-16 and post-16 as the funding came from different places.

Resolved:

- i. **To agree the work set out in Appendix 1 as required for the implementation of funding reform for high needs pupils in the Wiltshire context.**
- ii. **To keep the Formula Review Group for High Costs Pupils in place as the consultative group through this process, reporting to the SEN Working Group.**
- iii. **To expand the membership of the Formula Review Group to include a member of the Children's Services Commissioning Team to provide expertise in relation to independent sector provision and support on contracting arrangements.**

35 Schools Funding Reform - Review of funding formula

Liz Williams introduced the papers circulated at the meeting and attached to these minutes.

The subsequent discussion felt that responses shown in percentage terms did not show the pupil impact and it was agreed that the data should be analyzed to also show the representation in pupil numbers and that this would be brought to the meeting on 18 October 2012.

Concern raised over the inadequacy of deprivation measures gave confirmation that the deprivation could be different between the phases, and this was to be discussed at the next WASSH meeting and fed back to the Forum at the 18 October 2012 meeting.

36 **School Finance Regulations 2013**

Liz Williams, Head of Finance introduced the report and confirmed that the proposals had been taken into account in the new formula.

Resolved:

To note the report.

37 **Minimum Funding Guarantee Exceptions 2012-13**

Liz Williams, Head of Finance introduced the report and explained that as the deadline was 30 September 2012 the submission had made with input from the Schools Funding Working Group.

Resolved

To note the recommendations as listed below:

Special staff costs: To seek approval in principle from the Education Funding Agency (EFA) to remove safeguarded salary funding from the Minimum Funding Guarantee (MFG) when it is no longer payable.

Service school safety net: To seek approval from the EFA in principle to remove service school safety funding from the MFG where a schools pupil numbers used in the forthcoming financial year budget calculation exceeded the protected numbers under this factor in the previous year.

New school allowances and new school year group funding: To seek Department for Education (DfE) approval to remove this funding from the MFG.

Early Years Single Funding Formula Rates abatement: To seek approval from the EFA to remove the abatement from the MFG otherwise the cost of rates in schools with nursery classes would not be fully funded.

Small school curriculum protection: The removal of this funding from the MFG would cause a significant reduction in funding for one school that received it this year. Following consideration by the Schools Funding Working Group it is recommended that it should not be removed from the MFG in 2013/14.

Rents, where the school no longer qualifies under the revised funding proposals: To seek approval from the EFA to remove rents from the MFG where the cost does not exceed 1% of a schools budget share.

Split site funding where a school no longer qualifies: To seek approval from the EFA to remove split site funding from the MFG where a school no longer qualifies under the revised definition.

Service school turbulence funding: As the removal of this funding from the MFG would cause turbulence for a number of schools it is recommended that it should not be removed from the MFG

In year “trigger” funding for pupil growth: To seek approval from the EFA to remove “trigger” funding from the MFG and to confirm that existing arrangements for pupil growth will be held centrally from April 2013.

38 Confirmation of dates for future meetings

Future meeting dates were detailed as:

18 October 2012
6 December 2012
24 January 2013
14 March 2013
27 June 2013
3 October 2013
12 December 2013
23 January 2014
13 March 2014

Resolved:

To note the dates.

39 Urgent Items

Thanks was given to Phil Cooch and Liz Williams for their work on the Schools Funding reform.

(Duration of meeting: 1.35 - 3.40 pm)

The Officer who has produced these minutes is Kirsty Butcher, of Democratic Services, direct line 01225 713 948, e-mail kirsty.butcher@wiltshire.gov.uk

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

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Wiltshire Council

Schools Forum

18 October 2012

Subject: Schools Forum Terms of Reference

Purpose of Report

1. To amend the current Terms of Reference for the Schools Forum.
2. To bring the Schools Forum in line with Department for Education (DfE) guidance.

Background

3. The Schools Forum (England) Regulations 2012 (Statutory Instrument No 2261/2012) revokes and replaces the Schools Forum (England) Regulations 2010 (Statutory Instrument No 344/2010), as amended, with a few changes principally relating to the membership and proceedings of Schools Forums.
4. The regulations are made under Section 47A and 138(7) of the School Standards and Framework Act 1998.
5. The regulations for 2012 came into effect on 1 October 2012 and the main changes are:

Membership:

- a. Requires that schools and Academies have broadly proportionate representation according to pupil numbers in each category, and that this is maintained as more conversions take place;
- b. Remove the requirement to have a minimum of 15 people on the Forum;
- c. Where there is at least one maintained secondary school in an authority, at least one schools member must be a representative of a secondary school;

Proceedings:

- d. Limit the number of other local authority attendees from participating in meetings unless they are a Lead Member, a Director of Children's Services (or their representative), Chief Financial Officer (or their representative), or are providing specific financial or technical advice (including presenting a paper to the Forum) (regulation 8(3));
- e. The Education Funding Agency (EFA) has been granted observer status at Schools Forums meetings (regulation 8(4)(f))

- f. Restricts the voting arrangements by allowing only schools members and the private, voluntary and independent members to vote on the funding formulae (regulation 8(10)).
 - g. Require local authorities to publish Forum papers, minutes and decisions promptly on their websites (regulation 8(13)); and,
 - h. Require Forums to hold public meetings – as is the case with other council committees (regulation 8(2)).
6. At the Schools Forum meeting held on 13 July 2012 it was resolved to:
- 1. To amend the composition of the Schools Forum as shown in the appendix attached.**
 - 2. To review the composition of Schools Forum annually**
 - 3. To amend the last sentence of section 2.1 of the Schools Forum terms of reference to read:-**

The constitution of the Wiltshire Schools Forum has been approved by the Cabinet Member for Children's Services through the delegated decision process, and any change to the constitution will require similar approval.

- 4. To amend section 2.2 of the Schools Forum terms of reference to read:-**

The majority of forum members are "schools members". There are:

- 6 elected Headteacher representatives (1 secondary, 4 primary and 1 special);
- 3 Academy representatives; and
- 4 elected governor representatives (1 secondary, 2 primary and 1 school with special provision).

These 13 members, along with the two Early Years representatives are the only members allowed to vote on the funding formula.

There are 2 other nominated service partner representatives (1 from the Dioceses and 1 teacher representative) who both have one vote. These are the 17 voting members.

In addition to voting members there are 5 observers, 1 each from the 13-19 Strategic Partnership and ASK, 2 elected governor representatives from the Council's Children Select Committee are also invited as observers ex officio and the Education Funding Agency has observer status.

- 5. To recommend that the Cabinet member for Children's Services approve the change in composition and terms of reference as detailed above.**

7. Further amendments are now needed to the terms of reference to bring it into line with the new regulations, and the draft document is attached at appendix 1 to this report.

Terms of reference

8. The current Terms of Reference for the Wiltshire Schools Forum has, following endorsement by this Forum, been approved by the Cabinet Member for Children's Services through the delegated decision process, and any change to the Terms of Reference will require similar approval.
9. It is proposed that the Cabinet Member for Children's Services approve the amended terms of reference following endorsement from the Forum.

Environmental and climate change considerations

10. None.

Equalities Impact of the Proposal

11. The Forum has an explicit duty to have regard to the duties placed on Local Education Authorities and school governors by the Sex Discrimination Act 1975 and the Race Relations Act 1976. The Forum will note the DfE view that the Human Rights Act 1998 applies.

Financial Implications

12. None

Legal Implications

13. This report focuses on the Schools Forum regulations and the associated constitution of the Wiltshire Schools Forum.

Proposals

14. That Schools Forum:
 1. Endorse the Terms of Reference as seen at Appendix 1 to this report; and
 2. Recommend that the Cabinet member for Children's Services on behalf of Cabinet approve the Terms of Reference for the Wiltshire Schools Forum

***Reason for Proposal**

To bring the Schools Forum in line with Department for Education (DfE) guidance and relevant legislation.

Carolyn Godfrey

**Corporate Director
Children & Education**

Report Author:
Kirsty Butcher, Democratic Services Officer

October 2012

Background Papers

The following documents have been relied on in the preparation of this report:

1. Terms of Reference Schools Forum October 2012 DRAFT
2. The Schools Forums (England) Regulations 2012
3. 2012 09 07 schools forum regulations guidance

WILTSHIRE SCHOOLS FORUM **TERMS of REFERENCE**

1. Remit

The Schools Forum is a statutory body which the LA is required to consult on the following functions:

1.1 Consultation on School Funding Formula

- (1) The relevant LA shall consult the forum on:
 - (a) Any proposed changes in relation to the factors and criteria that were taken into account, or the methods, principles and rules that have been adopted, in their formula made in accordance with regulations made under section 47 and 47ZA of the School Standards and Framework Act 1998; and
 - (b) The financial effect of any such change.
- (2) Consultation under paragraph (1) shall take place in sufficient time to allow the views expressed to be taken into account in the determination of the relevant authority's formula and in the initial determination of schools' budget shares before the beginning of the financial year.

1.2 Consultation on Contracts

- 1) The relevant authority shall at least one month prior to the issue of invitations to tender consult the forum on the terms of any proposed contract for supplies or services being a contract paid or to be paid out of the relevant authority's schools budgets where the estimated value of the proposed contract is not less than the specific threshold which applies to the relevant authority in pursuance of Regulation 8 of The Public Contracts Regulations 2006 (SI 2006 No 5).

1.3 Consultation on Financial Issues

- (1) The relevant authority shall consult the forum annually in respect of the relevant authority's functions relating to the schools budget, in connection with the following:
 - (a) The arrangements to be made for the education of pupils with special educational needs;
 - (b) Arrangements for the use of pupil referral units and the education of children otherwise than at school;
 - (c) Arrangements for early years provision;

- (d) Administrative arrangements for the allocation of central government grants paid to the schools via the authority.
- (2) The relevant authority may consult the forum on such other matters concerning the funding of schools as they see fit.

2. Composition

- 2.1 The requirements for the Schools Forum were previously set out in regulations (Statutory Instrument No 344/2010, amended by 1172/2010). These regulations have been revoked and replaced by the Schools Forums (England) Regulations 2012 (Statutory Instrument No 2261/2012). The composition of the Wiltshire Schools Forum has been approved by the relevant Cabinet Member, and any change in composition will require the approval of the relevant Cabinet Member.
- 2.2 The majority of forum members are “schools members”. There are:
- 6 elected Headteacher representatives (1 secondary, 4 primary and 1 special);
 - 3 Academy representatives; and
 - 4 elected governor representatives (1 secondary, 2 primary and 1 school with special provision).

These 13 members, along with the two Early Years representatives are the only members allowed to vote on the funding formula.

There are 2 other nominated service partner representatives (1 from the Dioceses and 1 teacher representative) who both have one vote. These are the 17 voting members.

In addition to voting members there are 5 observers, 1 each from the 13-19 Strategic Partnership and ASK, 2 elected governor representatives from the Council’s Children Select Committee are also invited as observers ex officio and the Education Funding Agency has observer status.

- 2.3 The Forum will appoint the same number of substitutes in respect of each voting representative group as that group holds ordinary seats on the Forum. Ordinary members may be substituted by any one of the named substitutes. Substitute members will have all the powers and duties of any ordinary member of the Forum.

3. Conduct

- 3.1 In carrying out their functions, members of the Schools Forum are expected to act in accordance with the seven principles of public life set out in the first report of the Committee on Standard in Public Life: selflessness, integrity, objectivity, accountability, openness, honesty and leadership.
- 3.2 Members of the School Forum are required to declare an interest in any individual proposal or service contract which directly affects a school at which they are a governor, member of staff, or which their children attend or in which they might have a direct pecuniary interest.

4. Term of Office

- 4.1 The term of office for members of the Schools Forum shall be three years subject to their remaining eligible. A member may resign at any time and is required to leave if he or she ceases to be eligible in the capacity in which elected/nominated.
- 4.2 There is no limit on the number of terms of office to which a member may be elected or re-nominated if still eligible. Where a member is replaced, the new member serves for the remainder of the term of office.

5. Chair and Vice-Chair

- 5.1 A chair and vice-chair will be elected annually by a majority of votes cast by individual members. Where possible, the chair and vice-chair will not be drawn from the same voting group. The term of office is for one year. A chair or vice-chair will cease to hold office if they resign by giving notice to both the Chair and clerk of the Forum, or if they cease to be members of the Forum. Both the chair and vice-chair may be re-elected. Where a casual vacancy arises, there will be a vote at the next meeting of the Forum.
- 5.2 The responsibilities of the chair and vice-chair include: chairing meetings, overseeing preparation of the record of the meeting, submitting a budget for LA approval and being accountable for expenditure against that budget.

6. Quorum

- 6.1 The quorum for the Forum is 40% of voting members. A meeting may continue if inquorate, but any advice given to the LA as a result of such a meeting would not have to be taken into account by the authority.

7. Clerk to the Committee

- 7.1 The clerk will be appointed by Democratic Services at Wiltshire Council

8. Notice of Meetings

- 8.1 The clerk will ensure that meetings of the Forum are convened by giving a minimum notice of 5 working days in advance of the meetings, with a full agenda.

9. Proceedings

- 9.1 Each voting member has one vote and a majority decision is required.
- 9.2 The Forum may remit matters for discussion and research to sub-committees or working groups. However, any resulting advice formally passed to the LA shall have been approved by the Forum as a whole.
- 9.3 The Forum will meet at least 4 times per annum, in each financial year from April 2003.

10. Public Participation

- 10.1 Members of the public are able to ask questions or make a statement in relation to the responsibilities and functions of the Forum at each meeting. A maximum of 15 minutes will be allocated to this at the start of each meeting, and each question or statement should last no longer than 3 minutes.
- 10.2 Questions must be put in writing to the clerk of the Forum no later than 5 clear working days before the meeting, to allow a response to be formulated, and are limited to a maximum of 2 per person / organisation. A response will be given as either a direct oral answer or a written reply.
- 10.3 Statements must be given in writing and can be received up to 10 minutes before the start of the meeting.
- 10.4 Statements and questions must be relevant to the powers and duties of the Forum. They must not be defamatory, frivolous, offensive, vexatious, unlawful or otherwise improper. They must not name or identify individual service users, members of staff or members of partner agencies. Questions must not require the disclosure of confidential information.
- 10.5 The Chairman's ruling on rejection of a question is final.

11. Discrimination

- 11.1 The Committee has an explicit duty to have regard to the duties placed on Local Education Authorities and school governors by the Sex Discrimination Act 1975 and the Race Relations Act 1976. The Forum will note the DfE view that the Human Rights Act 1998 applies.

12. Dissemination of the Results of Meetings

- 12.1 A copy of the minutes of the Forum meetings will be sent to all schools and will be considered by the Children's Services Select Committee and the Cabinet if necessary.

October 2012



Education
Funding
Agency

Chairs and Clerks of Schools Forums.

31 August 2012

Dear Colleague,

As you may recall from our previous announcements about the reformed funding system, we will have observer status on schools forums. We believe that this will enable us to support the local process and provide a national perspective. We have said that an EFA representative will not attend every meeting but may want to see how the Forum is working, and could be asked to attend specific meetings if members thought it helpful or if there were any concerns about the running or composition of the forum.

It might be helpful if we clarify our role. This is to be impartial and ensure local authorities are compliant with the requirements of the new system and are behaving reasonably.

We have already explained in our previous announcements that we will not investigate general representations from individual schools that have lost funding under the new formula arrangements. What we will investigate is complaints from maintained schools or Academies that suggest they will be unreasonably funded as a result of the local authority not applying an allowable formula factor or not requesting an exceptional factor. We will also monitor the impact of the new formulae on different types of schools to inform future funding policy.

We thought it would be helpful if forums had a named contact for each region. We already have service delivery teams in place but for more technical queries and issues, there is a Funding Reform team, which will be able to offer advice and attend where there are particularly complex issues. The team includes two experienced local authority secondees and already has close contact with local authorities through regional finance officer meetings. If you have any general queries about the reforms or if you would like someone from the EFA to attend because there are particular concerns of the nature set out above, please contact

[:reformteam.funding@education.gsi.gov.uk](mailto:reformteam.funding@education.gsi.gov.uk)

The table below shows the contact in each team for each region.

Region	Service Delivery Team	Funding Reform Team
London	Sue Samson	Bev Pennekett
SE	Sue Samson	Bev Pennekett
SW	Sue Reekie	Bev Pennekett
East	Martin Lamb	Keith Howkins
West Midlands	Sue Reekie	Keith Howkins
East Midlands	Martin Lamb	Keith Howkins
North-west	Liz Butcher	Gavin Monument
Yorkshire and Humberside	Liz Butcher	Gavin Monument
North-east	Liz Butcher	Gavin Monument

As we move towards the implementation of the reformed system, we believe that you and your forums play a critical role in the scrutiny of local authority proposals. We hope that forum members will be actively engaged and we will be stressing to both maintained schools and Academies the importance of communicating with their representatives on their forum.

Yours sincerely,

Keith Howkins,
Team Leader, Funding Reform Team
Education Funding Agency, Department for Education

Copied to
Chief Finance Officers,
Finance Officers,

Wiltshire Council

Schools Forum
18th October 2012

School Funding Reform – Approval of Wiltshire Funding Formula for 2013-14

Purpose of report

1. To agree the Wiltshire schools funding formula for 2013-14 in accordance with the DfE's school funding reform proposals, and to recommend the formula to Cabinet for approval.

Background

2. The DfE issued the consultation document *School Funding Reform: next steps towards a fairer system* on 26th March 2012. The proposals contained within the document required a full review of the Wiltshire funding formula for schools to comply with the more limited flexibility for local formula and the new requirements on delegation of central budgets and for funding provision for high needs pupils. Final arrangements for 2013-14 were published by the DfE on 28th June 2012.
3. At the meeting on 13th July Schools Forum agreed the elements of the local funding formula on which mainstream schools would be consulted. These were:
 - a. The level of the lump sum to be included in the formula. Options to be consulted on were agreed as £85,000 or £100,000;
 - b. The data that should be used to drive funding for deprived pupils to schools. Options to be consulted on were agreed as Free School Meals (FSM) Ever6 or Income Deprivation Affecting Children Index (IDACI) data.
4. At the same meeting Schools Forum received further detail on the requirements for the delegation of central budgets. There are a number of services for which the budgets need to be allocated through the new funding formula but which can be de-delegated for maintained schools. Approval for de-delegation is by the relevant phase members of Schools Forum. It was agreed by Schools Forum at the July meeting that details of those budgets and associated costs would be included within the consultation issued to schools in order to inform the responses from maintained schools.

Main Considerations for School Forum

School Funding Formula

5. A consultation document was issued to all Wiltshire maintained schools and academies on 3rd September 2012 with a response date of 21st September 2012. The outcomes of the consultation were

reported to Schools Forum at the meeting on 4th October. That summary is attached again to this report (Appendix 1).

6. At the meeting on 4th October Schools Forum requested further analysis of the deprivation data firstly to show the responses in terms of pupil numbers covered in each response, and, secondly, to compare the two options with the Experian post-code data currently used by Wiltshire in the funding formula. The analysis of responses on deprivation by pupil numbers is shown in Table 1 below.

Table 1 – analysis of responses on deprivation indicators by pupil number

FSM or IDACI - by pupil number

Phase	FSM	IDACI	Total Pupil numbers covered by responses	FSM	IDACI
Primary	11,186	9,749	20,935	53%	47%
Secondary	1,946	3,237	5,183	38%	62%
Primary Academy	318	485	803	40%	60%
Secondary Academy	1,954	3,313	5,267	37%	63%
Grand Total	15,404	16,784	32,188		

47.9% 52.1%

7. The data in Table 1 indicates that a majority of pupils in maintained primary schools are covered by schools which show a preference for FSM data whilst the majority of pupils at secondary level and in primary academies are within schools expressing a preference for IDACI data.
8. The comparison with Experian data is attached as Appendix 2 to this report. The appendix shows schools ranked by Experian score (high score = high deprivation) and the corresponding “rank” for FSM and IDACI data. The data indicates that the schools with the highest levels of deprivation according to Experian tend to score highly under each dataset however, in primary schools FSM does appear to be a better fit to the Experian score in more rural schools – there are a number of examples in which the IDACI data varies significantly from the Experian data. There is less variation in secondary schools although there are 3 schools where the FSM data gives a significantly different result to the Experian and IDACI indices.
9. Schools Forum initially set a principle that a single deprivation factor should be applied across the whole formula. It is possible within the regulations to apply a combination of the two sets of data.
10. The options open to Schools Forum for determining how funding for deprivation will be distributed to schools are:
 - a. Free School Meals data across all schools
 - b. IDACI data across all schools

- c. A combination of both – for example FSM at primary level and IDACI at secondary
- 11. Schools Forum is asked to agree the data to be used to allocate funding for deprivation.
- 12. Based on the outcome of the consultation it is recommended that the level of the lump sum within the formula be set at £100,000.
- 13. Following consultation with schools it is therefore recommended that Schools Forum agree a funding formula for Wiltshire Schools based on the formula factors outlined in **Appendix 3** (with a separate decision to be made on deprivation).

Delegation of Central Budgets

- 14. Maintained schools were consulted on the delegation of a number of centrally held budgets. Whilst these budgets must be delegated to academies and to special schools it is possible to de-delegate the funding where maintained schools agree that they wish budgets to be held centrally by the local authority.
- 15. The responses from to the consultation indicated that the majority of schools within each phase would prefer that budgets continue to be retained centrally, ie., de-delegated. A review has been carried out of the central services to establish whether a viable service could be retained based on the likely level of budget to be de-delegated. Based on the outcomes of that review, and the views expressed by schools in the consultation responses, recommendations are listed in **Appendix 4** to this report.
- 16. It is important to note that central budgets will reduce over time as more schools convert to academy status and it will be important to continue to review the viability of any centrally retained service as budgets are set each year.

Proposals

- 17. That Schools Forum agree the data to be used to distribute funding for deprivation.
- 18. That Schools Forum agree the following recommendations to Cabinet:
 - a. The formula factors for the Wiltshire funding formula in 2013-14 are approved as laid out in Appendix 3
 - b. Central budgets are de-delegated or incorporated within the formula as laid out in Appendix 4.

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Appendices

Appendix 1 – summary of consultation responses

Appendix 2 – comparison of Free School Meals and IDACI data with Experian score for each school

Appendix 3 – Recommended formula factors for 2013-14

Appendix 4 – recommendations for delegation or de-delegation of central budgets

Formula Funding Review Sept 12 Consultation**FSM or IDACI**

Phase	FSM	IDACI	Total responses by phase	% Responses by Phase
Primary	73	50	123	65.08%
Secondary	3	5	8	80.00%
Primary Academy	2	1	3	30.00%
Secondary Academy	2	3	5	26.32%
Grand Total	80	59	139	

57.6% 42.4% 60.96%

Preferred Model

Model 1

£85k or £100k

Phase	£85K	£100K	Total responses by phase	% Responses by Phase
Primary	48	76	124	65.61%
Secondary	2	6	8	80.00%
Primary Academy	1	2	3	30.00%
Secondary Academy	1	5	6	31.58%
Grand Total	52	89	141	

36.9% 63.1% 61.84%

Schools Contingency - Delegated or Retained Centrally

Phase	Delegate	Retain	Total responses by phase	% Responses by Phase
Primary	37	81	118	62.43%
Secondary	3	5	8	80.00%
Grand Total	40	86	126	

31.7% 68.3% 63.32%

FSM Eligibility Service - Delegated or Retained Centrally

Phase	Delegate	Retain	Total responses by phase	% Responses by Phase
Primary	24	96	120	63.49%
Secondary	2	6	8	80.00%
Grand Total	26	102	128	

20.3% 79.7% 64.32%

Insurance - Delegated or Retained Centrally

Phase	Delegate	Retain	Total responses by phase	% Responses by Phase
Primary	54	66	120	63.49%
Secondary	5	3	8	80.00%
Grand Total	59	69	128	
	46.1%	53.9%	64.32%	

SIMS Licence - Delegated or Retained Centrally

Phase	Delegate	Retain	Total responses by phase	% Responses by Phase
Primary	7	113	120	63.49%
Secondary	1	7	8	80.00%
Grand Total	8	120	128	
	6.3%	93.8%	64.32%	

HCSS Licence - Delegated or Retained Centrally

Phase	Delegate	Retain	Total responses by phase	% Responses by Phase
Primary	8	112	120	63.49%
Secondary	1	7	8	80.00%
Grand Total	9	119	128	
	7.0%	93.0%	64.32%	

Copyright Licence - Delegated or Retained Centrally

Phase	Delegate	Retain	Total responses by phase	% Responses by Phase
Primary	12	108	120	63.49%
Secondary	1	7	8	80.00%
Grand Total	13	115	128	
	10.2%	89.8%	64.32%	

Trade Union Duties - Delegated or Retained Centrally

Phase	Delegate	Retain	Total responses by phase	% Responses by Phase
Primary	21	99	120	63.49%
Secondary	1	7	8	80.00%
Grand Total	22	106	128	

17.2% 82.8% 64.32%

Maternity Costs - Delegated or Retained Centrally

Phase	Delegate	Retain	Total responses by phase	% Responses by Phase
Primary	11	109	120	63.49%
Secondary	1	7	8	80.00%
Grand Total	12	116	128	

9.4% 90.6% 64.32%

Ethnic Minority Achievement Service - Delegated or Retained Centrally

Phase	Delegate	Retain	Total responses by phase	% Responses by Phase
Primary	46	73	119	62.96%
Secondary	3	5	8	80.00%
Grand Total	49	78	127	

38.6% 61.4% 63.82%

Traveller Education Service - Delegated or Retained Centrally

Phase	Delegate	Retain	Total responses by phase	% Responses by Phase
Primary	37	82	119	62.96%
Secondary	3	5	8	80.00%
Grand Total	40	87	127	

31.5% 68.5% 63.82%

Primary Behaviour Support Service - Delegated or Retained Centrally

Phase	Delegate	Retain	Total responses by phase	% Responses by Phase
Primary	32	88	120	63.49%
Secondary	1	5	6	60.00%
Grand Total	33	93	126	
	26.2%	73.8%	63.32%	

Appendix 2 - Comparison of Ranking of Deprivation Data (FSM and IDACI compared with Experian)

DfE	NOR	Experian Ranking	FSM Ranking	IDACI Ranking
Primary Schools				
2190 WOODLANDS PRIMARY SCHOOL	205	222	215	192
2230 TROWBRIDGE LONGMEADOW PRIMARY SCHOOL	108	221	218	195
5206 STUDLEY GREEN PRIMARY SCHOOL	161	220	217	193
2192 PEMBROKE PARK PRIMARY SCHOOL	143	219	195	185
5202 KINGS PARK PRIMARY SCHOOL	267	218	205	177
3030 ST DUNSTAN JUNIOR SCHOOL	251	217	214	173
2032 CORSHAM REGIS PRIMARY SCHOOL	148	216	209	157
3331 THE TRINITY (ST PETERS, DEVIZES) SCHOOL	87	215	183	176
2136 WESTBURY INFANTS SCHOOL	158	214	207	189
3472 BELLEFIELD PRIMARY SCHOOL	252	213	211	186
2227 NEWTOWN PRIMARY SCHOOL	195	212	208	187
2178 PRINCECROFT PRIMARY SCHOOL	100	210	202	162
2168 PRIESTLEY PRIMARY SCHOOL	145	209	212	191
3056 SOUTHBROOM JUNIOR SCHOOL	183	208	201	178
3466 THE MANOR PRIMARY SCHOOL	193	207	210	160
2185 MERE PRIMARY SCHOOL	185	206	145	17
3192 WESTBURY JUNIOR SCHOOL	243	205	206	180
3344 FOREST AND SANDRIDGE PRIMARY SCHOOL	196	204	141	125
2023 CHIPPENHAM ST PAULS PRIMARY SCHOOL	240	203	190	181
5215 LUDGERSHALL CASTLE PRIMARY SCHOOL	242	202	181	194
2037 SOUTHBROOM INFANTS SCHOOL	203	201	204	168
3470 WILTON & BARFORD PRIMARY SCHOOL	117	200	194	77
3387 ST MARTINS PRIMARY SCHOOL	138	199	213	190
3216 ST PETERS PRIMARY SCHOOL	170	198	188	150
3172 STRATFORD SUB CASTLE PRIMARY SCHOOL	128	197	203	183
5207 WARMINSTER ST GEORGES PRIMARY SCHOOL	113	196	163	169
2170 GROVE PRIMARY SCHOOL	391	195	123	147
3123 MARLBOROUGH ST MARYS INFANT SCHOOL	144	194	186	142
2191 MANOR FIELDS PRIMARY SCHOOL	179	193	185	151
3190 WARMINSTER ST JOHNS PRIMARY SCHOOL	114	192	156	158
3205 WARMINSTER SAMBOURNE PRIMARY SCHOOL	124	191	172	98
2196 HOLBROOK PRIMARY SCHOOL	235	190	168	175
5205 FROGWELL PRIMARY SCHOOL	240	189	198	170
3469 FIVE LANES PRIMARY SCHOOL	103	188	160	179
3239 TISBURY ST JOHNS PRIMARY SCHOOL	90	187	165	20
3207 DILTON MARSH PRIMARY SCHOOL	173	186	196	184
2180 REDLAND PRIMARY SCHOOL	288	185	144	174
5200 MELKSHAM ALOERIC PRIMARY SCHOOL	316	184	130	108
5225 THE AVENUE PRIMARY SCHOOL	235	182	187	101
3459 HINDON ST MARYS AND ST JOHNS PRIMARY SCHOOL	44	181	192	27
5217 ZOUCHE PRIMARY SCHOOL	298	180	81	29
3463 WHITESHEET PRIMARY SCHOOL	85	179	197	8
3170 STAVERTON PRIMARY SCHOOL	212	178	175	182
3450 GREAT WISHFORD PRIMARY SCHOOL	115	176	87	1
3448 BEMERTON ST JOHNS PRIMARY SCHOOL	200	173	96	148
2022 IVY LANE PRIMARY SCHOOL	282	172	199	167
3191 THE MINSTER PRIMARY SCHOOL	221	170	86	87
2208 PEWSEY PRIMARY SCHOOL	173	169	182	171
2134 NEW CLOSE PRIMARY SCHOOL	155	167	121	100
2198 LUDWELL COMMUNITY PRIMARY SCHOOL	64	166	151	1
2008 FITZMAURICE PRIMARY SCHOOL	241	165	107	153
3468 AMESBURY PRIMARY SCHOOL	243	164	200	137
3425 ST OSMUNDS CATHOLIC PRIMARY SCHOOL	205	163	132	172

Appendix 2 - Comparison of Ranking of Deprivation Data (FSM and IDACI compared with Experian)

DfE	NOR	Experian Ranking	FSM Ranking	IDACI Ranking
5204 CALNE SAINT EDMUNDS ACADEMY	197	163	161	143
5209 PAXCROFT PRIMARY SCHOOL	266	162	173	159
3100 LACOCK PRIMARY SCHOOL	78	161	76	109
2225 BITHAM BROOK PRIMARY SCHOOL	272	159	170	161
3352 HEYTESBURY PRIMARY SCHOOL	57	158	112	112
5214 DEVIZES ST JOSEPHS ACADEMY	216	157	74	124
3465 WYLYE VALLEY PRIMARY SCHOOL	119	156	135	73
5222 ROWDE PRIMARY SCHOOL	210	155	142	107
3061 DURRINGTON ALL SAINTS PRIMARY SCHOOL	169	154	129	127
3230 DINTON PRIMARY SCHOOL	89	153	167	1
2222 WALWAYNE COURT PRIMARY SCHOOL	275	152	128	146
3166 SOUTHWICK PRIMARY SCHOOL	160	150	146	54
3222 MARKET LAVINGTON ST BARNABAS PRIMARY SCHOOL	96	149	191	45
2005 NURSTEED PRIMARY SCHOOL	202	148	174	123
3430 TROWBRIDGE ST JOHNS PRIMARY SCHOOL	295	147	58	152
3203 ST BARTHOLOMEWS PRIMARY SCHOOL	299	145	140	156
2028 CORSHAM PRIMARY ACADEMY	585	142	162	83
3063 DURRINGTON JUNIOR SCHOOL	167	141	155	136
3162 SHAW PRIMARY SCHOOL	186	140	31	13
3022 BULFORD ST LEONARDS	186	139	154	42
3412 CHRIST THE KING CATHOLIC PRIMARY SCHOOL	255	137	110	120
2193 WANSDYKE COMMUNITY SCHOOL	218	136	139	132
3090 HOLT PRIMARY SCHOOL	124	135	107	67
2184 LONGLEAZE PRIMARY SCHOOL	175	134	171	144
3366 MORGANS VALE AND WOODFALLS PRIMARY SCHOOL	88	133	126	31
3020 BROMHAM ST NICHOLAS PRIMARY SCHOOL	92	132	89	59
2223 BOWERHILL PRIMARY SCHOOL	346	131	122	61
3454 SEMLEY PRIMARY SCHOOL	102	129	60	76
3435 WARDOUR PRIMARY SCHOOL	106	128	29	1
3383 SARUM ST PAULS PRIMARY SCHOOL	208	127	94	90
3150 PURTON ST MARYS PRIMARY SCHOOL	312	126	55	134
2009 BRATTON PRIMARY SCHOOL	144	125	180	70
3047 CROCKERTON PRIMARY SCHOOL	110	124	75	91
2053 HORNINGSHAM PRIMARY SCHOOL	78	123	54	75
3036 CHIRTON PRIMARY SCHOOL - closing 31/12/12	37	122	189	88
5218 CLARENDON JUNIOR SCHOOL	302	121	92	64
3362 ST ANDREWS PRIMARY SCHOOL	171	120	127	139
3021 ST MARYS BROUGHTON GIFFORD PRIMARY SCHOOL	69	119	72	30
3049 COLLINGBOURNE PRIMARY SCHOOL	112	118	83	117
2226 CHARTER PRIMARY SCHOOL	199	117	184	128
3088 HILPERTON PRIMARY SCHOOL	155	116	133	122
3453 CHILMARK AND FONTHILL BISHOP SCHOOL	116	115	4	1
5219 CLARENDON INFANTS SCHOOL	309	114	26	38
3319 CHIPPENHAM ST PETERS PRIMARY SCHOOL	256	113	90	155
3160 SEMINGTON ST GEORGES PRIMARY SCHOOL	67	112	109	66
3158 HARNHAM JUNIOR SCHOOL	271	111	137	82
2137 WESTWOOD WITH IFORD PRIMARY SCHOOL	85	109	45	69
2091 HARNHAM INFANTS SCHOOL	240	108	46	116
2003 CALNE FYNAMORE PRIMARY SCHOOL	408	107	105	72
3135 NORTH BRADLEY PRIMARY SCHOOL	174	106	79	79
3437 ST PATRICKS CATHOLIC PRIMARY SCHOOL	201	105	48	89
3400 WEST ASHTON PRIMARY SCHOOL	105	104	11	140
3308 BISHOPS CANNINGS PRIMARY SCHOOL	200	103	108	33
3467 CHURCHFIELDS THE VILLAGE SCHOOL	134	101	118	7
3401 DAUNTSEYS PRIMARY SCHOOL	154	100	111	42

Appendix 2 - Comparison of Ranking of Deprivation Data (FSM and IDACI compared with Experian)

DfE	NOR	Experian Ranking	FSM Ranking	IDACI Ranking
3229 COOMBE BISSETT PRIMARY SCHOOL	91	99	41	14
3174 SUTTON VENY PRIMARY SCHOOL	171	98	3	114
3396 ST THOMAS A BECKET PRIMARY SCHOOL	52	97	1	1
3462 AMESBURY ARCHER PRIMARY SCHOOL	206	95	158	47
3117 MALMESBURY PRIMARY SCHOOL	420	94	100	1
3164 SHREWTON PRIMARY SCHOOL	117	93	138	32
2159 KIWI PRIMARY SCHOOL	111	92	17	41
3017 LONGFORD PRIMARY SCHOOL	60	91	67	129
3045 ST SAMPSONS JUNIOR SCHOOL	197	90	124	154
3015 CHRIST CHURCH PRIMARY SCHOOL	405	89	99	40
3193 WESTBURY LEIGH PRIMARY SCHOOL	408	88	169	99
2162 NOREMARSH JUNIOR SCHOOL	166	85	153	81
3023 ST KATHARINE PRIMARY SCHOOL	81	84	119	11
2065 LARKHILL PRIMARY SCHOOL	269	83	53	38
3199 WINSLEY PRIMARY SCHOOL	105	83	48	78
3407 WOODFORD VALLEY PRIMARY SCHOOL	150	82	98	63
2052 HILMARTON PRIMARY SCHOOL	102	81	23	55
2157 WYNDHAM PARK INFANTS SCHOOL	272	80	70	97
3449 BROAD CHALKE PRIMARY SCHOOL	181	79	12	1
2140 WOOTTON BASSETT INFANTS SCHOOL	123	78	101	84
2202 ST SAMPSONS INFANTS SCHOOL	137	77	85	145
3094 KEEVIL PRIMARY SCHOOL	96	76	13	6
3134 NEWTON TONY PRIMARY SCHOOL	39	75	73	68
3176 SALISBURY ST MARKS JUNIOR SCHOOL	325	75	97	105
3461 KENNET VALLEY PRIMARY SCHOOL	78	74	79	36
3316 CHAPMANSLADE PRIMARY SCHOOL	110	73	42	92
3000 ALL CANNINGS PRIMARY SCHOOL	134	70	71	24
3460 ALDERBURY AND WEST GRIMSTEAD PRIMARY SCHOOL	144	69	120	28
5213 CALNE HOLY TRINITY PRIMARY SCHOOL	204	68	56	126
5201 DOWNTON PRIMARY SCHOOL	189	67	77	3
3102 LANGLEY FITZURSE PRIMARY SCHOOL	93	64	47	60
3086 HEDDINGTON PRIMARY SCHOOL	48	63	102	46
3457 WALTER POWELL PRIMARY SCHOOL	45	62	52	1
2031 NESTON PRIMARY SCHOOL	168	61	65	52
3201 WINTERBOURNE EARLS PRIMARY SCHOOL	178	60	116	96
3456 GREAT CHEVERELL HOLY TRINITY ACADEMY	148	59	61	93
5224 NETHERAVON ALL SAINTS PRIMARY SCHOOL	187	58	64	51
3355 PORTON ST NICHOLAS	104	57	34	57
3141 OARE PRIMARY SCHOOL	94	55	113	80
3186 URCHFONT PRIMARY SCHOOL	102	54	5	21
5208 CHIPPENHAM ST MARYS PRIMARY SCHOOL	273	53	68	104
3104 LEA AND GARS DON PRIMARY SCHOOL	108	52	16	1
2216 BURBAGE PRIMARY SCHOOL	117	51	38	77
3013 BOX PRIMARY SCHOOL	171	50	49	9
3406 WOODBOROUGH PRIMARY	156	49	20	49
3243 GREAT BEDWYN PRIMARY SCHOOL	212	48	40	1
3071 FIGHELDEAN ST MICHAELS PRIMARY SCHOOL	87	46	62	1
3300 ALDBOURNE ST MICHAELS PRIMARY SCHOOL	132	45	82	34
3140 OAKSEY PRIMARY SCHOOL	89	44	18	19
2228 QUEENS CRECENT PRIMARY SCHOOL	349	43	78	115
2045 GOMELDON PRIMARY SCHOOL	144	42	1	50
3388 SEEND PRIMARY SCHOOL	100	41	50	1
2218 KINGS LODGE PRIMARY SCHOOL	396	40	44	43
3019 BROAD TOWN PRIMARY SCHOOL	65	39	73	79
2034 CHIPPENHAM MONTON PARK PRIMARY	225	38	51	95

Appendix 2 - Comparison of Ranking of Deprivation Data (FSM and IDACI compared with Experian)

DfE	NOR	Experian Ranking	FSM Ranking	IDACI Ranking
3318 CHILTON FOLIAT PRIMARY SCHOOL	96	37	84	85
3381 RUSHALL PRIMARY SCHOOL	96	35	104	26
3418 MALMESBURY ST JOSEPHS PRIMARY SCHOOL	132	32	115	1
3163 SHERSTON PRIMARY SCHOOL	199	31	36	1
3018 BROAD HINTON PRIMARY SCHOOL	97	30	27	1
3161 SHALBOURNE PRIMARY SCHOOL	40	29	152	1
3040 COLERNE PRIMARY SCHOOL	220	28	35	5
3091 HULLAVINGTON PRIMARY SCHOOL	118	27	57	1
3402 WHITEPARISH ALL SAINTS PRIMARY SCHOOL	119	26	9	1
3048 CRUDWELL PRIMARY SCHOOL	118	25	10	1
2004 SALISBURY GREEN TREES PRIMARY SCHOOL	229	24	131	44
2040 EASTON ROYAL PRIMARY SCHOOL	50	23	32	16
3242 BRINKWORTH EARL DANBYS PRIMARY	152	22	25	48
3035 CHERHILL PRIMARY SCHOOL	188	21	95	25
3002 ASHTON KEYNES PRIMARY SCHOOL	172	20	28	39
3471 LYNEHAM PRIMARY SCHOOL	273	19	30	12
3306 BAYDON ST NICHOLAS PRIMARY SCHOOL	109	18	15	62
3244 BY BROOK VALLEY PRIMARY SCHOOL	168	17	66	58
2087 RAMSBURY PRIMARY SCHOOL	213	16	19	2
3038 CHRISTAN MALFORD PRIMARY SCHOOL	85	15	6	15
3159 SEAGRY PRIMARY SCHOOL	36	14	50	1
3149 PRESUTE PRIMARY SCHOOL	211	13	21	36
3143 OGBOURNE ST GEORGE AND ST ANDREW	83	12	37	36
5216 PITTON PRIMARY SCHOOL	104	11	33	35
3405 WINTERSLOW PRIMARY SCHOOL	171	10	14	10
3372 THE NEW FOREST PRIMARY SCHOOL	178	9	7	23
3110 LYDIARD MILLCENT PRIMARY SCHOOL	201	8	39	71
3330 DERRY HILL PRIMARY SCHOOL	208	7	48	37
3220 MINETY PRIMARY SCHOOL	115	6	24	4
3096 KINGTON ST MICHAEL PRIMARY SCHOOL	122	5	47	22
5212 SUTTON BENDER PRIMARY SCHOOL	147	4	50	16
2006 THE MEAD PRIMARY SCHOOL	485	3	43	56
2060 LUCKINGTON PRIMARY SCHOOL	44	2	80	1
2086 STANTON ST QUINTON PRIMARY SCHOOL	99	1	59	1

Appendix 2 - Comparison of Ranking of Deprivation Data (FSM and IDACI compared with Experian)

DfE	NOR	Experian Ranking	FSM Ranking	IDACI Ranking
Secondary Schools				
6906 SARUM ACADEMY	549	211	193	164
4069 THE CLARENDON SCHOOL	924	183	177	166
4013 MELKSHAM OAK SCHOOL	1052	177	166	121
4075 THE JOHN OF GAUNT SCHOOL	1050	175	179	165
5411 DEVIZES SCHOOL	992	174	176	149
5415 MATRAVERS SCHOOL	890	171	178	163
4072 WARMINSTER KINGDOWN	1260	168	134	125
6905 THE WELLINGTON ACADEMY	706	160	148	138
4610 SALISBURY ST JOSEPHS SCHOOL	416	151	150	141
5403 PEWSEY VALE SCHOOL	312	148	157	135
5406 THE JOHN BENTLEY SCHOOL	959	146	164	133
4001 WYVERN COLLEGE	327	144	143	131
4070 THE STONEHENGE SCHOOL	693	143	147	110
4071 AVON VALLEY SCHOOL DURRINGTON	531	138	149	102
4066 THE CORSHAM ACADEMY	1117	130	159	94
4511 SALISBURY ST EDMUNDS GIRLS SCHOOL	776	110	114	113
5400 ST AUGUSTINES COLLEGE	763	102	22	118
5402 LAVINGTON ACADEMY	681	96	91	55
4006 TRAFALGAR SCHOOL	552	87	136	18
4537 ST LAURENCE SCHOOL	1079	86	103	103
4000 ABBEYFIELDS SCHOOL	722	72	125	86
4067 WOOTTON BASSETT ACADEMY	1176	71	117	106
5414 HARDENHUISH ACADEMY	1278	66	93	130
5405 ST JOHNS SCHOOL AND COMMUNITY COLLEGE	1273	65	69	65
5404 SHELDON ACADEMY	1392	56	106	119
4064 MALMESBURY SCHOOL	1043	47	63	9
5408 BRADON FOREST SCHOOL	1029	36	88	111
5413 BISHOP WORDSWORTH ACADEMY	603	34	2	74
5412 SOUTH WILTS ACADEMY	643	33	8	53

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Wiltshire Pre-16 Schools Funding Formula 2013-14
Summary of Allowable Factors and Recommendations

Formula Factor	Mandatory/Optional	Proposed to Use?	Allowable Formula Drivers	Formula Drivers - recommendations
Per Pupil entitlement	Mandatory	Yes	Single unit allowable for primary aged pupils and single unit each for KS3 and KS4	It is recommended that separate per pupil rates are set for Key Stage 3 and Key Stage 4 pupils. A single rate is proposed for Primary schools in accordance with the regulations
Deprivation	Mandatory	Yes	Two indicators are allowable: 1. Free School Meals (FSM or FSM Ever6) 2. Income Deprivation Affecting Children Index (IDACI) Data; or 3. Both If IDACI is used a proposed banding system has been set out by DfE which would target funding at the higher levels of deprivation	Still to be agreed
Looked After Children	Optional	No	Number of LAC as per March SSDA903 return	Not recommended for inclusion in the Wiltshire formula
Prior Attainment - as proxy for SEN	Optional	Yes	For secondary schools KS2 data to be used - <u>all</u> pupils achieving Level 3 or below in both English and Mathematics. For primary schools EYFSP to be used - LAs can choose between either <u>all</u> pupils achieving fewer than 78 points or <u>all</u> pupils receiving fewer than 73 points	It is recommended that a mix of factors be used to drive funding for low cost, high incidence SEN. The mix to include Prior Attainment, Deprivation and Per Pupil funding split as follows: Deprivation 18% Prior Attainment 53% Per Pupil 29% For primary schools it is recommended that pupils achieving fewer than 78 points at EYFSP are used.
English as An Additional Language	Optional	No	Pupils identified for a maximum of 3 years after the pupil enters the statutory age school system. Unit value per pupil.	Recommended that EAL data used to delegate central budgets for support for minority ethnic pupils (EMAS & Travellers Services)
Pupil Mobility	Optional	No	Data will include pupils who have started in the last 3 academic years but did not start in August or September (or January for Year 1). Unit value to be applied per pupil	Data modelled but does not support specific issues of mobility in service schools
Lump Sum	Optional	Yes	Single lump sum to be applied with no separate values for Primary and Secondary. Maximum allowable lump sum set at £200,000	It is recommended that a lump sum of £100,000 be applied
Split Site Allowance	Optional	Yes	Must be based on objective criteria for the definition of a split site and for how much is allocated. Can be lump sum or per pupil amount	Following work with all split site schools to identify the additional costs the following definition is proposed: A school will receive split site funding if, of necessity, it has 2 (or more) distinct campuses between which travel, by means of a public highway of more than one mile, is required and • Class teaching and learning must take place on all sites with physically detached administration (ie., on all sites). It is recommended that a lump sum be applied for each additional site, values £65,000 for Primary and £100,000 for secondary
Rates	Optional	Yes	Actual Costs	Recommend actual cost to be funded
PFI Contracts	Optional	Yes	Cash sum to reflect affordability gap	Recommend existing PFI factor is continued
Post 16 Per Pupil Factor	Optional	No	Only allowable where currently applied. Per pupil amount no higher than current unit value	It is not recommended that Wiltshire continues to have a post 16 AWPU
London Fringe Area	Optional	Not applicable to Wiltshire		

Delegation of Central Budgets 2013-14**Summary of Recommendations (budget figures to be confirmed)**

DfE Category	Section 251 Line Heading	Wiltshire Budgets Included	Gross Budget 2012-13 (including Central Support Costs)	Proposals for Delegation
(a) Has to be delegated; cannot be de-delegated but schools can buy into service where relevant				
	Threshold and performance pay	None - all delegated already	-	
	14-16 practical learning options	None - all delegated already	-	
	Primary/special school meals	None - all delegated already	-	
	Extended services	None - all delegated already	-	
(b) Has to be allocated through formula but can be de-delegated for maintained schools (approval is by the relevant phase members of the schools forum)				
	Contingencies (including previous amounts for schools in financial difficulties)	Schools Contingency	100,105	Recommend de-delegation
	Free school meals eligibility	Free School Meals Eligibility Service	35,796	Recommend de-delegation
	Insurance	Most Insurance Budgets already delegated - small budget previously used for insurance of unoccupied sites	25,434	Recommend Delegation
	Licences/subscriptions	Includes SIMS Licence, HCSS Licence, Copyright Licences	380,649	Recommend de-delegation
	Staff costs – supply cover	Trade Union Duties	50,000	Recommend de-delegation
		Maternity Costs	859,178	
	Support for minority ethnic pupils and underachieving groups	EMAS Team	599,503	Recommend de-delegation
		Travellers Education Service	295,837	
	Behaviour support services	Primary Behaviour Support Service	845,891	Recommend de-delegation
	Library and museum services	None - all delegated already	-	