

# Agenda

## SCHOOLS FORUM

**Date:** Tuesday 21 January 2020  
**Time:** 1.30 pm  
**Venue:** Mezz 3, New County Offices

*Reminder - If you are unable to attend a meeting, please send a substitute from the sector you represent.*

<b>Agenda Item</b>	<b>Time</b>	<b>Page No</b>
<b>1 APOLOGIES FOR ABSENCE / CHANGES IN MEMBERSHIP</b>	<b>13:30</b>	
<b>2 DECLARATIONS OF INTEREST</b> To disclose any Personal or Disclosable Pecuniary Interests	<b>13:35</b>	
<b>3 MINUTES OF THE PREVIOUS MEETING AND MATTERS ARISING</b> <b>3a SIGN OFF PREVIOUS MINUTES FOR ACCURACY</b> <b>3b ACTIONS FROM LAST MEETING</b>	<b>13:40</b>	<b>5 - 18</b>
<b>4 SCHOOLS FORUM FUNDING GROUP UPDATE</b> Verbal update to be provided by the Chairman of the Schools Forum Funding Group, Ms K Tamlyn.	<b>13:45</b>	
<b>5 BUDGET MONITORING</b> To be presented by Ms J Try, Finance Business Partner (Schools), BCC.	<b>13:50</b>	<b>19 - 26</b>
<b>6 SCHOOLS BUDGET PROPOSALS 2020-21</b> To be presented by Ms J Try, Finance Business Partner (Schools), BCC. To include updates on:  A. Schools Block B. High Needs Block C. Central Schools Services Block	<b>14:10</b>	<b>27 - 54</b>

D. Early Years

<b>7</b>	<b>SCHOOLS BUDGET PROPOSALS 2020-21- DECISION PAPER</b> To be presented by Ms E Williams, Head of Finance, Children's Services, BCC.	<b>14:40</b>	<b>55 - 56</b>
<b>8</b>	<b>APPEALS FUNDING</b> To be presented by Ms J Try, Finance Business Partner (Schools), BCC.	<b>15:00</b>	<b>57 - 64</b>
<b>9</b>	<b>GROWTH FUND</b> To be presented by Ms J Try, Finance Business Partner (Schools), BCC. To include proposed Growth Fund Models.	<b>15:30</b>	<b>65 - 70</b>
<b>10</b>	<b>UNITARY UPDATE</b> Verbal update to be provided by Mr G Drawmer, Head of Achievement and Learning, BCC.	<b>16:00</b>	
<b>11</b>	<b>FORWARD PLAN</b>	<b>16:15</b>	<b>71 - 74</b>
<b>12</b>	<b>ANY OTHER BUSINESS</b>	<b>16:25</b>	
<b>13</b>	<b>DATE OF NEXT AND FUTURE MEETINGS</b> 24 March 2020, 13.30pm-4pm. Knight Hall, Green Park.	<b>16:30</b>	

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If you would like to attend a meeting, but need extra help to do so, for example because of a disability, please contact us as early as possible, so that we can try to put the right support in place.

*For further information please contact: Christina Beevers on 01296 382938, email: [cbeevers@buckscc.gov.uk](mailto:cbeevers@buckscc.gov.uk)*

## **MEMBERSHIP:**

### **Headteachers**

**Kevin Patrick, Chiltern Hills - Secondary Academy (Chairman)**  
**Julia Antrobus, Newtown School - Primary (Infant) Maintained**  
**Jeanette Cochrane, Sir Henry Floyd Grammar School - Secondary Academy**  
**Paula Coppins, Manor Farm Community Infant School - Primary (Infant) Maintained**  
**Anita Cranmer, Cabinet Member for Education & Skills**  
**Sharon Cromie, Wycombe High School - Secondary Academy**  
**Jo Divers, Turnfurlong School - Primary (Junior) Maintained**  
**Janice Freeman, King's Wood School - Primary (Combined) Maintained**  
**Andy Gillespie, Burnham Grammar School - Secondary Academy**  
**David Hood, Cressex Community School - Secondary Maintained**  
**Jinna Male, Alfriston School - Special Academy**  
**Debra Rutley, Aspire - PRU**  
**Sue Skinner, Bowerdean & Henry Allen Nursery Schools - Nursery Maintained**  
**Steven Sneesby, Kite Ridge School - Special Maintained**  
**Eileen Stewart, Stoke Mandeville Combined School - Primary (Combined) Maintained**  
**Bradley Taylor, Chiltern Wood School - Special Maintained**  
**Aaron Wanford, Green Ridge Academy - Primary Academy**  
**Jill Watson, Lent Rise School - Primary Academy**

### **Governors**

**Howard Beveridge, Long Crendon School - Primary (Combined) Maintained**  
**Gaynor Bull, Sir Henry Floyd Grammar School - Secondary Academy**  
**Roy Page, Chalfont Community College - Secondary Academy**  
**Katy Simmons, Cressex Community School - Secondary Maintained**

### **Representatives**

**Sarah Fahey, Brindley House School - Early Years**  
**Claudia Glasgow, NASUWT - Trade Union**  
**Nicky Lovegrove, The Village Pre-School (Tylers Green) Early Years**  
**Sarah Stephens, National Education Union - Trade Union**

### **Observer**



# Minutes

## SCHOOLS FORUM

**MINUTES OF THE MEETING OF THE SCHOOLS FORUM HELD ON TUESDAY 3 DECEMBER 2019 IN DARKE HALL, GREEN PARK, ASTON CLINTON, COMMENCING AT 1.35 PM AND CONCLUDING AT 4.00 PM**

### PRESENT

Headteachers	Mr K Patrick (Chairman)	Chiltern Hills - Secondary Academy
	Ms J Antrobus	Newtown School - Primary (Infant) Maintained
	Ms J Cochrane	Sir Henry Floyd Grammar School - Secondary Academy
	Ms J Divers	Turnfurlong School - Primary (Junior) Maintained
	Ms J Freeman	King's Wood School - Primary (Combined) Maintained
	Mr A Gillespie	Burnham Grammar School - Secondary Academy
	Mr D Hood	Cressex Community School - Secondary Maintained
	Mrs J Male	Alfriston School - Special Academy
	Mrs D Rutley	Aspire - PRU
	Mr S Sneesby	Kite Ridge School - Special Maintained
	Ms S Skinner	Bowerdean & Henry Allen Nursery Schools - Nursery Maintained
	Ms E Stewart	Stoke Mandeville Combined School - Primary (Combined) Maintained
	Mr B Taylor	Chiltern Wood School - Special Maintained
	Mrs A Cranmer	Cabinet Member for Education & Skills
	Governors	Mr H Beveridge
Mrs G Bull		Sir Henry Floyd Grammar School - Secondary Academy
Mr R Page		Chalfont Community College - Secondary Academy
Representative	Dr K Simmons	Cressex Community School - Secondary Maintained
	Ms S Fahey	Brindley House School - Early Years
	Ms C Glasgow	NASUWT - Trade Union

Ms N Lovegrove	The Village Pre-School (Tylers Green) Early Years
Ms S Stephens	National Education Union - Trade Union

In Attendance

Officers Ms S Bayliss, Mr J Carter, Mr G Drawmer, Ms H Slinn, Ms J Try, Ms E Williams and Ms C Beevers

**1 APOLOGIES FOR ABSENCE / CHANGES IN MEMBERSHIP**

Apologies were received from Mr A Wanford (Green Ridge Academy), Ms P Coppins (Manor Farm Community Infant) and Ms P Thompson-Omenka (Service Director Education) BCC.

**2 DECLARATIONS OF INTEREST**

The Chairman declared an interest in item 7; the school was in receipt of the Growth Fund.

Ms C Glasgow declared an interest in item 6 as the union representative.

**3 MINUTES OF THE PREVIOUS MEETING AND MATTERS ARISING**

**RESOLVED:** The minutes from the meeting held on 15 October 2019 were **AGREED** as an accurate record and signed by the Chairman.

**RESOLVED:** The actions from the meeting held on 15 October 2019 were **AGREED** as completed or on the current agenda.

**4 SCHOOLS FORUM FUNDING GROUP UPDATE**

Ms K Tamlyn gave an overview of discussions at the Schools Forum Funding Group (SFFG) held on 20 October.

The action points from the SFFG held on 20 October 2019 would be appended to the minutes.

**ACTION: Ms C Beevers**

**5 SCHOOLS BUDGETS 2020-21**

Ms J Try, Finance Business Partner (Schools), gave an overview of the report provided, the following points were raised in discussion:

- It was asked what contributions were still being made to the Bucks Learning Trust

(BLT) contract. It was advised the BLT services were now back in-house. The historical financial commitment was sitting with the Early Years teams.

- It was asked if the £7m settlement figure in the budget was a one off or would be recurring. Officers confirmed that some assumption had been made as the settlement had not yet been announced and they aired on the side of caution in producing the budget. An update would be provided at the next meeting.

**ACTION: Ms J Try**

- Concerns were raised regarding the length of the consultation and how clear it was for those completing it. It was stated that the timeline for the consultation was constrained due to the lateness of information published by the DfE.
- It was suggested that in the future a list of relevant contacts be included to provide advice and support to schools completing the consultation.
- It was stated following a discussion at the recent SFFG meeting; model 1 was the preferred option.

## **Recommendations**

- 1.1- Schools Forum members are asked to note the information set out Part A and Part B including the accompanying appendices.**
- 1.2- To adopt model 1 MFG at + 0.5% as the preferred local funding formula for 2020-21 as this will bring the greatest number of schools closest to the NFF**
- 1.3- To note the modelling is on indicative allocations with final allocations due in December 2019, which will be used to update the preferred model.**

**RESOLVED: The forum NOTED the information set out in Part A and B.**

**RESOLVED: The forum took a vote and AGREED to adopt model 1 MFG at + 0.5% as the preferred local funding formula for 2020-21 as this would bring the greatest number of schools closest to the National Funding Formula (NFF).**

**RESOLVED: The forum NOTED the modelling was on indicative allocations with final allocations due in December 2019, which would be used to update the preferred model.**

## **6 DE-DELEGATION 2020/21**

Ms J Freeman (Kingswood School) gave an overview from the De-delegation meeting. The following points were raised in discussion:

- Ms C Glasgow, NASUWT, Teachers trade union raised a number of concerns re De-delegation for union facilities, these were appended to the minutes.
- It was also added that the under spend had been happening for a number of years It was advised union facilities for academies was not part of the

maintained schools dedelegation and that separate arrangements exist for this. The Chair of the Schools Forum Maintained Schools subcommittee suggested that a business case be presented by the unions at the de-delegation meeting in 2020.

#### **Recommendations:**

- 1.1- To note the information in this report and appendices.**
- 1.2- That mainstream maintained primary and secondary representatives of Schools Forum agree to a total de-delegation rate for Existing delegation of £7.30 per pupil in Primary and £9.05 per pupil in Secondary, and to agree services that have no de-delegation funding in 2020-21 will be reconsidered for funding in 2021-22.**
- 1.3- That mainstream maintained primary and secondary representatives of Schools Forum agree to a total de-delegation rate for former ESG services of £3.50 per pupil.**
- 1.4- That special school and PRU representatives on Schools Forum agree to a total de-delegation rate for former ESG services of £14 per place.**

**RESOLVED: The forum NOTED the information in the report and appendices.**

**RESOLVED: That mainstream maintained primary and secondary representatives of Schools Forum took a vote and agreed to a total de-delegation rate for existing delegation of £7.30 per pupil in Primary and £9.05 per pupil in Secondary, and agreed services that had no de-delegation funding in 2020-21 would be reconsidered for funding in 2021-21.**

**RESOLVED: That mainstream maintained primary and secondary representatives of Schools Forum took a vote and agreed to a total de-delegation rate for former ESG services of £3.50 per pupil.**

**RESOLVED: That special school and PRU representatives on Schools Forum took a vote and agreed to a total de-delegation rate for former ESG services of £14 per place.**

## **7 SEN UPDATE**

Ms E Williams, Head of Finance (Children's Services) and Ms H Slinn, Head of SEN, gave an overview of the report provided. The following points were raised in discussion:

- Ms A Prowsen, Impower, gave a presentation which would be appended to the minutes.
- It was stated that alongside the needs codification tool for SEND, there needed to be an underpinning of the legislation and it was agreed this would be taken into account. Ms K Simmons and Ms H Slinn to discuss outside of the meeting.



**ACTION: Ms H Slinn**

The forum noted the improvement in completion of Educational and Health Care Plans (ECHP) assessments

**RESOLVED: The forum NOTED the report.**

## **8 GROWTH FUND**

Ms E Williams, Head of Finance (Children's Services) gave an overview of the report provided, there were no further points raised in discussion:

**RESOLVED: The forum NOTED the report.**

## **9 UNITARY UPDATE**

Mr G Drawmer, Head of Achievement and Learning, BCC, gave a verbal update on unitary, the following points were raised and discussed:

- It was expected that all staff would be TUPE'd over to Buckinghamshire Council on 1 April 2020.
- The new branding for the Council had been agreed and would start to be rolled out.
- Business rate discussions were still ongoing, further updates would be shared.
- It was asked if updates could be shared when sending E payslips. Mr Drawmer would investigate.

**ACTION: Mr G Drawmer**

- It was stated that information had gone out to mainstream schools that has caused some confusion due to schools employing their own staff. It was advised that BCC were aware of the situation and were responding to queries individually.
- A reminder was given from the union member that as of 1 April 2020, all staff would be under a new employer and would automatically be enrolled onto the pension scheme. If anyone did not want to be a part of the pension scheme they would need to opt- out.

**RESOLVED: The forum NOTED the update.**

## **10 FORWARD PLAN**

It was agreed that the item on Banding would be moved to the March meeting.

**ACTION: Ms C Beevers**

**RESOLVED: The forum NOTED the forward plan.**

Schools Forum membership – secondary schools -

Ms J Try, Finance Business Partner (Schools), gave an overview of the report provided, for the membership proposed plan the following points were raised in discussion:

The forum agreed in principle they were happy to take this forward, with an agreement for a review to take place in September.

**ACTION: MS J Try**

## **11 ANY OTHER BUSINESS**

Side by Side – concern was raised about ongoing funding for the side by side project and if it would continue. It was advised that it was funded by an ongoing grant agreed in November 2016 with a figure of around £650, 000 per year. BCC had a strategy in place to cover the fund were it to be reduced. [Minutes from Children’s select committee 27 November 2019.](#)

Impower presentation

A member of the forum asked who had paid for the consultation carried out by Impower. It was advised that the local authority had paid for this and that it had not been taken from the High Needs Block. Officers would ensure that the outcome of the work with Impower would be shared when the final report was agreed.

## **12 DATE OF NEXT MEETING**

21 January 2020, 13.30-16.30pm  
Mezzanine 3, New County Offices, Aylesbury.

## **13 EXCLUSION OF PRESS AND PUBLIC**

**To resolve to exclude the press and public as the following item is exempt by virtue of Paragraph 3 of Part 1 of Schedule 12a of the Local Government Act 1972 because it contains information relating to the financial or business affairs of any particular person (including the authority holding that information)**

## **14 SCHOOLS PAY REVIEW**

**CHAIRMAN**

## Schools Forum Funding Group

### Action Notes for meeting held on 20 November 2019

Agenda item number	Action	To be completed by	Completion date
2	<b>Declarations of Interest</b>		
2	Mr K Patrick declared an interest in item 7 as a receiver of the growth funding and restrained from participation during this item.	N/A	N/A

4	<b>Schools Budget 2020-21</b>		
4	To find out the difference in funding between highest and lowest funded schools nationally. To include some comparatives in the report to go to schools forum.	Ms J Try	SF Meeting
4	To clarify what the historic commitments were and what impact this would have moving forward.	Ms J Try	SF Meeting
4	To ensure point 9.2 was clear in pointing out that the hourly rate increase was to local authorities and not providers and to amend the timing of the reports back to SF and EY forum.	Ms J Try	SF Meeting
4	9.2 To confirm if the 1 year was a financial year or an academic year for supplementary funding for maintained schools.	Ms J Try	SF Meeting
4	To include the local authority response to the DSG consultation.	Ms J Try	SF Meeting
4	For Schools forum members to ask colleagues to respond to the consultation.	All SFFG Committee Members	20.11.19
4	To ask Ms H David to send out a reminder of the consultation via schools bulletin.	Ms J Try	20.11.19
4	To update the paper once the results of the consultation results are known via a supplementary paper.	Ms J Try	SF Meeting

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4	To present the characteristics of the schools that may struggle if not in local funding formula.	Ms J Try/Mr J Carter	SF Meeting
4	To share with members of the forum how many responses had been received to date for the consultation.	Ms J Try	20.11.19
4	To add 0.5 MFG to the recommendation 14.2 for clarity.	Ms J Try	SF Meeting

5	<b>De-delegation 2020-21</b>		
5	To add the table and recommendations as per Ms Try's notes to the schools Forum report.	Ms J Try	SF Meeting

6	<b>SEN update</b>		
6	To add sub-headings on 2.1, to make clear what is BCC summaries and what came from the Select Committee.	Ms H Slinn	SF Meeting
6	To add actual numbers of additional places for special schools/PRUs to 3.1(i) and to confirm activity levels and cost for mainstream top up from checking data.	Ms E Williams	SF Meeting
6	Add in a point 6- around managing expectations of using the additional £7.2m and an action plan and comparisons on last year.	Ms E Williams	SF Meeting
6	To extend the booking of the January schools forum meeting to allow enough time.	Ms C Beevers	20.11.19
6	To add in a bullet point to item 5 around the inclusion of partner agencies.	Ms H Slinn	SF Meeting
6	To include a point in item 5 to explain where the cost of the work of IMPOWER is being funded from.	Ms E Williams	SF Meeting

7	<b>Growth plan</b>		
7	To add a summary to explain the history of the group and that the group is no longer required.	Mr J Carter	SF Meeting
7	To add in the DfE funding figure, but also clarify this figure is likely to change.	Mr J Carter	SF Meeting
7	To add some clarity around figures, differences in figures- to use worked examples to show what the funding looks like.	Mr J Carter	SF Meeting



<b>8</b>	<b>Forward Plan</b>		
	SF Membership paper To add a note to the recommendation to advise that these changes will be made once vacancies become available in the secondary sector.	<b>Ms J Try</b>	<b>SF Meeting</b>

<b>9</b>	<b>AOB</b>		
	Ms Tamlyn advised she was unavailable for the January meeting; Mr Sneesby would be available to Chair the meeting.	<b>Mr S Sneesby</b>	<b>Jan 2020 SFFG Meeting</b>

Schools Forum 3rd Dec 2019  
Agenda Item 6 -De-delegation 2020-21

Summary of points made

Miss C Glasgow requested that the recommendation in the paper not to de-delegate Union Facilities for 2020-21 be reviewed. She stated that if she had known when the Maintained Schools Sub-committee meeting was taking place earlier in the term, she would have attended that meeting to make the case for continued de-delegation. In response to a question about how the meeting was advertised to Forum members it was clarified that this was through the Schools Bulletin which Miss Glasgow confirmed that she could not access.

Miss Glasgow made the following points:

- The Union Facilities fund is used to release staff from their substantive teaching roles so that schools can provide teaching cover for the classes they would otherwise be teaching without financial loss to the school concerned.
- Election to Union lay officer roles takes place on an annual basis, usually in April/May, in line with each Union's own rules.
- Currently there are a number of supply teachers and retired teachers in union roles who are not eligible to claim from the Facilities fund and this has been the case for a number of years.
- Elections in the past year have seen union lay officer vacancies filled and also school employed staff taking on lay officer roles so the situation is now changing.
- De-delegating Union Facilities at Schools Forum level enables economies of scale to be achieved by individual schools and for employers to fulfil their legal obligation to release employees for trade union duties.
- The Union Facilities fund supports mainly the work of the County Secretaries and caseworkers.
- Training for accredited caseworker's amounts to 4.5 days initially and then 3 days per annum thereafter.
- In addition to training, caseworkers need to be released from teaching roles to represent members at formal meetings.
- From a school's perspective and, in order to ensure continuity of education for pupils, it is better for union lay officers to have designated time off timetable so that classes are taught by another teacher who is timetabled at those times, rather than ad hoc release and the need for the school to find a supply teacher.

In response to a question about monitoring of the Union Facilities fund, Miss Glasgow clarified that funds are allocated to each Union and the County Secretaries then collate information regarding time off for their own lay officers and send it to the Local Authority for payments to be made to the relevant schools.





<b>Action</b>	<b>To be completed by</b>	<b>Outcome</b>
To append the action notes from the 20 November Schools Forum Funding Group meeting to the Schools Forum minutes.	<b>Ms C Beevers</b>	<b>Completed</b>
To provide an update on the £7 million settlement figure in the budget, as to whether this would be one-off or reoccurring.	<b>Ms J Try</b>	<b>Completed</b>
To discuss whether there needed to be an underpinning of the legislation, alongside the needs codification tool for SEND, outside of the SF meeting.	<b>MS H Slinn/ Ms K Simmons</b>	
To investigate whether updates could be shared when sending E-payslips.	<b>Mr G Drawmer</b>	
To move the banding item on the forward plan to the March meeting.	<b>Ms C Beevers</b>	<b>Completed</b>
To confirm where the pay review consultation had been advertised and how long the consultation had run for/	<b>Mr G Lamb</b>	



## Report to Schools Forum

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<b>Title:</b>	<b>Dedicated Schools Grant 2019-20 - Budget Monitoring Report and Reserves as at 30<sup>th</sup> November 2019</b>
<b>Date:</b>	21 <sup>st</sup> January 2020
<b>Author:</b>	Liz Williams, Head Of Finance, Childrens Services
<b>Contact officer:</b>	Janaki Try – Finance Business Partner (Schools) <a href="mailto:jtry@buckscc.gov.uk">jtry@buckscc.gov.uk</a> 01296 383063
<b>Schools affected:</b>	All schools and Early Years providers

### 1. Purpose of this report

- 1.1. This report updates Schools Forum on the Dedicated Schools Grant (DSG) **forecast** outturn position (year-end) for 2019-20 as at 30<sup>th</sup> November 2019 and the forecasted Dedicated Schools Grant Reserve year-end position for the financial year 2019-20.
- 1.2. The report highlights a projected overspend year end position of £3.43m against **current budgets**, an increase of £2.54m on the last reported position at the end of August 2019. This is made up as follows:
  - £2.92m overspend in the High Needs block (the forecast is after £2.75m of additional funding added to budgets in 2019-20, which brings the overspend to £5.67m over and above the DSG allocation for High Needs).
  - £0.42m overspend in the Early Years block (overspend based on current DSG allocations that will be updated for January 2020 census)
  - £0.34m overspend in the Schools block.
  - (£0.25m) underspend in the Central Schools Service block
- 1.3. The DSG reserve in October 2020 was reported to have a surplus of £1.95m. Taking into account the overspend position this will result in a forecasted negative deficit reserve of £1.48m with all earmarked and free reserves used. Actions proposed in this report to recover this position in 2020-21 will leave an estimated deficit reserve early in the financial year of £0.2m. A longer term recovery plan (including levels of ear-marked reserves) is to be brought back to Schools Forum in March 2020.
- 1.4. This position will be reported to BCC's Corporate Management Team and Childrens Budget Board, and the outcome of this scrutiny will be fed back to Schools Forum.

### 2. Movement in Forecasts from August 2019

2.1. The main movements from August are broken down as follows:

- High Needs Education Health Care Plans (EHCP) Top up in Mainstream schools – an **increase of £1.2m** on the budget of £7m. The report to Schools Forum in December highlighted the pressures following the successful work to clear the backlog of EHCPs assessments and issue plans. The costs are based on detailed schedules from schools in November and in early December, School Forum was made aware the forecast overspend would be in excess of £0.5m.
- High Needs Independent schools overspend – an **increase of £536k**. Schools Forum in December was advised that the forecast was likely to increase as September starter data is confirmed.
- High Needs post 16 colleges – an **increase of £500k**, reflecting increased demand for places
- Early Years – an **increase of £420k**. August’s position was a balance budget, although it was noted that pupil data in December would provide a clearer picture of activity.
- Schools Block – a **reduction of (£176k)** in maintained Schools Business rates after securing charitable relief for a number of schools

### 3. Background

3.1. As agreed by Schools Forum, the final budgets in the 4 blocks to be spent in 2019-20 included additional funding for High Needs - a transfer from Central Services School Block (Historic Commitments) and draw down from DSG reserves:

DSG block allocations as at November 2019 to 2019-20 budgets	Allocation After Recoupment	movement between blocks	use of reserves	Import /export adjustment to be met from reserves	Final Budgets
	£m	£m	£m	£m	£m
Schools Block	165.7	0.0	0.0	0.0	<b>165.7</b>
High Needs Block	74.5	1.7	1.05	0.16	<b>77.4</b>
Early years Block	31.6	0.0	0.0	0.0	<b>31.6</b>
Central Schools Services Block	7.4	-1.7	0.0	0.0	<b>5.7</b>
<b>Total DSG Allocation 2019-20</b>	<b>279.2</b>	<b>0.0</b>	<b>1.05</b>	<b>0.16</b>	<b>280.4</b>

3.2. The November DfE allocations reflect the latest academy recoupment, a reduction in the schools block of (£0.240m) since the last reported allocation in July 2019.

#### 4. The Forecasted Outturn (Year-end) position

4.1. The table below shows the 4 blocks forecasted to year end as at 30th November 2019, and then adjusted for further estimates based on the latest information. The adjusted forecasted year-end position is a +£3.43m overspend, details are shown below:

DSG blocks 2019-20 as at 30th November 2019	Budget Plan 2019/20	Year-end Forecast Outturn as at 30/11/19	Year-end Forecast Variance as at 30/11/19	Forecast Variance including adjustment post November	Year-end Forecast Variance as at 31/08/19	Forecast change from August
	£m	£m	£m		£m	£m
Schools Block	165.76	166.10	0.34	<b>0.34</b>	0.54	<b>-0.20</b>
High Needs Block	77.39	79.76	2.37	<b>2.92</b>	0.56	2.35
Early Years Block	31.56	31.56	0.00	<b>0.42</b>	0.00	0.42
Central Schools Services Block	5.72	5.47	(0.25)	<b>-0.25</b>	(0.22)	(0.02)
<b>Total Budgets*</b>	<b>280.43</b>	<b>282.89</b>	<b>2.46</b>	<b>3.43</b>	<b>0.89</b>	<b>2.54</b>

\* Reduction in budget since August 2019 of £0.24m for latest academy recoupment

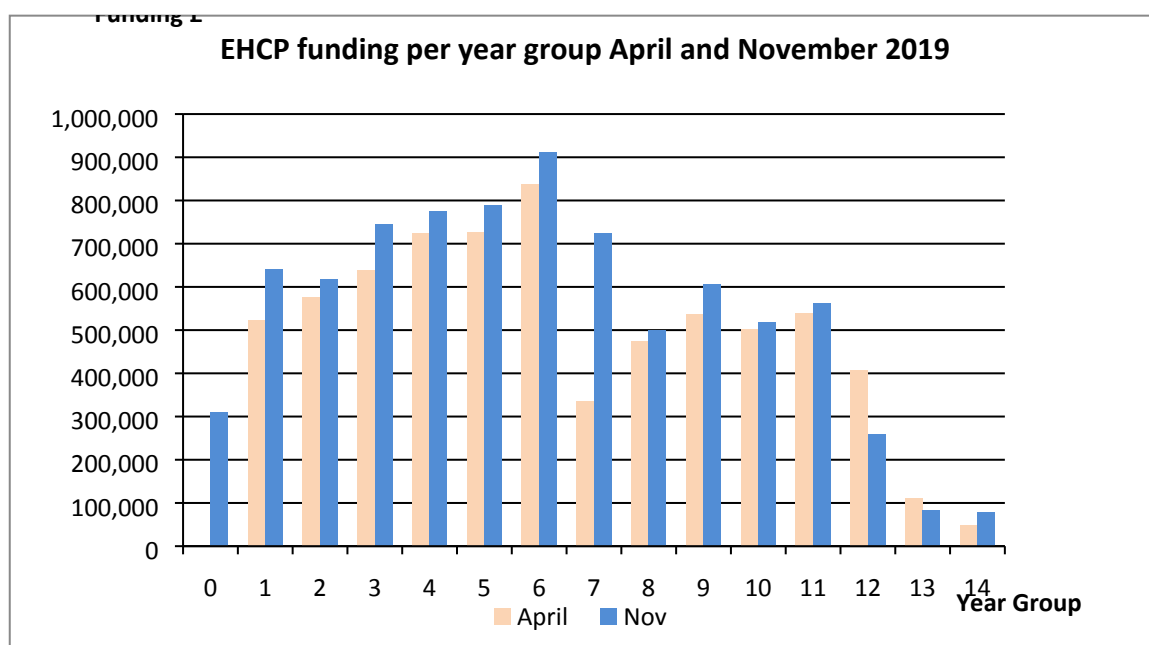
4.2. **Schools Block** forecast overspend of £340k (A reduction of (£200k) on August's figures). The main points to note are as follows:

- £239k Growth Fund overspend (a reduction of £27k on August) overspend relates to payments to St Michaels over and above estimated project costs. A projection for next year's Growth Fund is included in budget proposals report and growth fund report later on the agenda.
- £101k Business Rates (maintained schools) overspend (a reduction of £1761k on August). The current position includes a reduction in costs after securing charitable relief for some schools. The loss of transitional protection following the rateable revaluations in 2017-18 has increased the cost for this year. Next year's costs for all schools have been estimated and any shortfall in DfE funding will be top sliced from the 2020-21 funding formula, and is included in the schools budget proposals report.

4.3. **High Needs Block** adjusted forecast overspent of £2.92m (An increase of £2.35m on August's position). One of the main reasons for the increase in costs has been the success in clearing the assessment backlog for approximately 500 EHCPs. This was highlighted as a risk in the SEN update report to Schools Forum in December 2019. The key variances are as follows:

- £1.2m Education Health Care Plans (EHCP) Top up in Mainstream schools. The increase reflects additional pupils and increased unit costs. Pupil numbers are

based on data, confirmed by schools 1 November, including September's intake. Pupils in receipt of funding have increased by a net 397 since April 2019 (April 1344 pupils and November 1741 pupils). Some pupils with an EHCP will not have a top-up as their needs are to be met from notional SEN funding within the School's Budget Share. The average full year costs for a pupil in April was estimated to be £5,198, but now is £5,528, an increase of £330. The graph below shows year group data, with all year groups except years 12 and 13 showing an increase in funding for this financial year. It shows the highest funded year group is year 6, and the greatest increase in costs is in year 7.



*Note: pupil year group data shown in April has been adjusted to reflect individual year group as at September to provide a like for like comparison.*

- £561k Independent schools overspend – an increase of £536k on the August position. This includes £109k backdated payments, and reflects an increase in both FTEs and an increase in unit costs. Currently there are 256.8 FTEs at an average unit cost of £57,558. The budget of £14.2m was set to support 258.5 FTEs at a unit cost of £55,000. Numbers of known placements are therefore broadly in line with the budget. However unit costs are higher than budgeted for. The average unit cost masks a significant range in costs of individual placement, varying from less than £10k per year to in excess of £250k per year. There is risk the forecast will increase if additional children are placed between now and the end of the financial year.
- £500k post 16 colleges expected increases based on latest information. Student numbers in post-16 colleges requires further analysis so that this forecast can be finalised, however numbers are projected to be higher than in the previous year.
- £480k Additional and Exceptional support – for pupils in special schools, secondary PRU, and pupils receiving education at home, an increase of £34k on August.
- £76k Special School top up - no change on August's position. This represents payments to support 6 additional pupils placed in BCC special schools.

- £74k exclusions and reintegration costs an increase of £24k on the August position.

The on-going effect of these costs is considered in the High Needs budget proposals report further down in the agenda.

4.4. **Early Years** adjusted forecasted overspend of £420k. August's position was a balanced budget, although it was noted that pupil data in December would provide a clearer picture of activity. Any increase in pupil numbers captured in the January 2020 census will lead to additional funding from the DfE, but this will be paid after the year end. This timing issue has caused this block to be overspent in 2019-20. The main points to note are as follows:

- £280k overspend on 3-4year olds (based on the latest pupil data)
- £134k overspend on 2 year olds (based on latest pupil data)

4.5. **Central Schools Service Block** underspend of (£250k) of which (£262k) relates to unallocated budgets from 'historical spend contribution to combined budgets'. Part of this budget was to fund the BLT Early Years' service, but since this service has come back into the Council's control, and following the restructure of the Early Years' service, the saving of (£262k) has remained unallocated to offset overspends elsewhere in the DSG..

## 5. Mitigating Actions (High Needs Block)

5.1. A number of actions to reduce high needs expenditure were reported to the October meeting of Schools Forum. Those actions include initiatives within both mainstream and specialist provision and are expected to show impact in future years. The outcome of the work by Impower on demand trajectories and impact of earlier intervention will inform an action plan for the local authority to reduce costs within the high needs block over time. The report from this work is expected to be finalised during the current month.

5.2. Actions which are expected to have a direct impact on costs in 2020-21 include:

- a) Revised SEN Panel procedures – these are already impacting on the decision making processes
- b) Review of processes for EHC plans to ensure resource allocation is appropriate and is reviewed. A new system is in place for agreeing EHC needs assessments which ensure robust decision making, in November 2019 66% of EHC needs assessments were agreed compared to the same time during the previous year of approx. 90%.
- c) Speech and Language link – this is expected to reduce the numbers of requests for EHC plans, focused on children aged 5-7yrs as an early intervention measure.
- d) Focus on Ordinarily Available Provision – to be launched in January 2020 through initial training sessions, greater highlighting of the provision that is expected to be

- put in place for those children at SEND Support utilising already delegated funds to schools.
- e) Side by side work with schools to focus on inclusion

5.3. Whilst the impact of these actions is difficult to fully quantify it is expected that there will be a reduction in both the numbers and costs of EHC plans in the next year with an increased focus on the support that needs to be in place to support pupils.

## 6. DSG Reserves

6.1. The last DSG Reserves position reported to Schools Forum in October 2019 was a surplus of (£1.95m). Actions agreed (to date) by Schools Forum, the impact of the forecasted overspend and actions to be taken in 2020-21 to recover this position are shown in the table below:

	Reserves as at 1st April 2019	Actions Agreed Schools Forum June 2019	Actions Agreed Schools Forum October 2019	Balance of reserves as at October 2019
<b>DSG Reserves</b>				
Mandeville school - deficit write off	500,000	0		500,000
Early Years - changes in grant funding	700,000	0		700,000
Dedelegation	717,511	(£300,000)		417,511
High Needs funding for 2019-20	1,021,694	(£1,021,694)		0
<b>In -year additional funding and agreed actions</b>				
Early Years -additional funding for 2018-19 received after year end based on Jan 2019 Census			509,642	
High Needs Import/Export adjustments			(£153,333)	
Increase in HN blocks use of reserves to balance budgets			(£26,660)	
Add 'Free Reserves' to balance				329,648
<b>Reserves after agreed actions</b>	<b>2,939,205</b>	<b>(£1,321,694)</b>	<b>329,648</b>	<b>1,947,159</b>
Reserves as at the end of October 2019				1,947,159
Less Forecasted year-end overspend position				(£3,430,000)
<b>Forecasted DSG deficit position 31.03.20</b>				<b>(£1,482,841)</b>
<b>Deficit Recovery plan 2020-21</b>				
Forecasted DSG deficit position 31.03.20				(£1,482,841)
Use of unallocated Revenue contribution to Capital				844,205
Early Years DSG adjustment for January Census				420,000
<b>Forecasted DSG deficit position 01.04.20</b>				<b>(£218,636)</b>

6.2. The deficit recovery plan 2020-21 detailed above, proposes to use the £844k unallocated balance of revenue contribution to capital in 2020-21 within Central Schools Service Block and the expected £420k additional DSG funding for Early Years pupils from the January 2020 census (to offset the reported overspend on current budgets in 2019-20).



Schools Forum is asked to agree to the use of these funds, which will leave an estimated deficit reserve early in the 2020-21 of £0.2m. Detailed recovery plans (including levels for ear-marked reserves) are to be brought back to Schools Forum in March 2020.

6.3. As reported to Schools Forum in December 2019, the DfE are introducing new rules and procedures around deficit DSG reserves, subject to consultation. The outcome of the consultation was not available at the time of writing this report. Since 2019-20 the DfE has set the principle that the DSG is ring-fenced and any deficit is to be carried on the reserve and not met from a Local Authority's General Fund. Should the deficit be more than 1% of the DSG allocation, the Local Authority is to set out recovery plans to bring DSG back into balance. The 1% will be calculated on the latest published DSG allocations gross of recouplement. For Buckinghamshire the 1% is a deficit of £4.4m.

6.4. Despite the principle that Local Authorities are able to carry forward a deficit in DSG reserve, it is essential that a recovery plan is developed so that the Council does not continue to have a deficit position against the DSG budget.

## **7. Recommendations**

### **7.1. That Schools Forum:**

- (a) Note the forecast outturn (year-end) position of £3.43m, as set out in the report**
- (b) Agree the use of funds as set out in 6.2 above as part of the 2020-21 DSG reserve recovery plan**
- (c) Agree that budget proposals for 2020-21 must include provision to address the projected deficit in the DSG reserve.**
- (d) Agree that a longer term recovery plan for the DSG reserve (including levels for ear-marked reserves) is brought back to the March Schools Forum meeting.**





## Buckinghamshire County Council Schools Forum

### Report to the Schools Forum

<b>Title:</b>	Schools Budget Proposals 2020-21
<b>Committee date:</b>	21 <sup>st</sup> January 2020
<b>Author:</b>	Liz Williams, Head of Finance Children's Service
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#### 1. Purpose of Agenda Item

- 1.1. The report sets out latest information on the 4 blocks of the Dedicated Schools Grant (DSG) based on the October 2019 census and other up to date information as published by the Department of Education (DfE) on the 19<sup>th</sup> December 2020. The report sets out the implications of the allocations and budget proposals for each block reflecting the principles that have been agreed by Schools Forum in previous meetings.

#### 2. Background

- 2.1. Table 1 gives the latest allocations with a total of £472m before recoupment for DSG in 2020-21, and updates previous information reported to Schools Forum. Details for the Early Years Block were not made available until now. Buckinghamshire will receive an increase of £28.52m on 2019-20 total DSG, of which £21.46m is in the schools block:

**Table 1 Comparative Data 2020-21: December allocations and indication allocations**

DSG Blocks 2020-21	Central School				Total DSG £m
	Schools Block £m	High Needs £m	Services £m	Early Years £m	
DfE allocations (Dec. 2019)	343.63	90.06	6.45	32.10	472.25
Indicative allocations October 2019	339.33	89.84	6.43		435.59
Change	4.31	0.22	0.03		4.56



## SECTION A

### 3. Schools Block

- 3.1. School Block's allocations for BCC are now based on the October 2019 census and reflect the national increase of 4% to the formula's core factors, as well as the minimum per pupil funding. The DfE have confirmed, following the outcome of consultations, that the national minimum per pupil funding levels, at the values in the National Funding Formula (NFF), are now compulsory for local authorities to use in their own local funding formulae. BCC has moved to this value as part of its overarching principle to adopt the National funding formula as agreed by Schools Forum in December 2019.
- 3.2. Table 2 shows the comparison in funding – December 2019 allocations and the indicative allocations that were based on October 2018 census data:

**Table 2: Comparative Data Schools Block 2020-21**

Schools Block 2010-21	Pupil Numbers	Pupil Led Factors £m	Funding through premises factors £m	Growth Funding £m	Total 2020-21 £m
DfE December 2019 allocations	74,701.5	336.67	3.83	3.14	343.63
Indicative allocations October 2019	73,903.0	332.69	3.83	2.8	339.33
Change	798.5	3.97	0.00	0.34	4.31

- 3.3. The £4.31m increase from indicative allocations is explained as follows:
- Increase in pupil numbers 798.50 funding increased by £3.64m
  - Increase in per pupil rate £4.50 funding increased by £0.34m
  - Increase in growth fund £0.34m mainly based on DfE's categorisation of pupil numbers at Bourne End.
- 3.4. The local funding formula model as agreed by schools Forum in December 2019 has been recalculated using the updated allocations. The model uses the NFF rates with a +0.5% Minimum Funding Guarantee (MFG) and a provision for Business Rates (Model 1 in the December Schools Forum papers). As a result of the December allocations, there are now 5 schools protected through MFG but now the cost protection (£186.5k) is met within the DfE allocation and no school is required to be capped. The total cost of protection is £186.5k (ranging from £4.8k to £81.4k) and in total these schools account for 725 of the total pupil population. The

protection in the main is as a result of historic funding following expansion through school merges, and these schools will be contacted by the local authority to discuss what this will mean in the future. Appendix 3 gives information at school level. For maintained schools the final allocations to individual's schools, via the Schools Budget Share template is after the deduction for de-delegated services, again agreed at Schools Forum.

- 3.5. The recalculated model reflects the DfE's expected growth fund methodology as detailed in a separate report further down in the agenda. This means schools in receipt of growth fund for agreed pupil numbers will now see this funding in their school level details.
- 3.6. The details, including schools level allocations, are given in the Appendices:
  - Appendix 1 - Recalculated Funding Rates
  - Appendix 2- Recalculated Funding Levels
  - Appendix 3 - Comparison by School
  - Appendix 4 - Growth Fund overview
- 3.7. Schools Forum members are recommended to note the information set out in the paper including the accompanying appendices and to agree:
  - To continue with the model agreed in December 2019, updated for the latest data and allocations.

## SECTION B

### 4. High Needs Block 2020-21

#### *High Needs Block Funding Allocation 2020-21*

- 4.1. The final allocation for High Needs is an increase of £7.5m on last year and is slightly higher than the estimated £7.2m. At this stage the DfE have not confirmed whether this is on-going funding:

**Table 3: Comparative Data High Needs Block 2020-21**

High Needs Block 2010-21	* Before Recoupment £m
DfE December 2019 allocations	90.06
Indicative allocations October 2019	89.84
Change	<b>0.22</b>

\* Recoupment for academies and FE colleges (funded directly by the EFA)

- 4.2. The increase in funding of £7.5 million is welcome however it is set in the following context:
- The revenue budget monitoring report elsewhere on the agenda for this meeting states that the high needs block is expected to be £2.9 million overspent in the current year. Whilst a number of actions are expected to reduce costs during the 2020-21 financial year, it is clear that pressures against this budget will continue as there is a need to meet increased demand both in terms of numbers of pupils needing support, and complexity of need.
  - It is also important to note that the high needs budget set for 2019-20 included a transfer of £1.708 million from the Central Schools Services Block and a contribution from reserves of £1.048 million. This means that planned spend exceeded the 2019-20 allocation by £2.75 million. Neither of these one off sources of funding are available to support the budget in 2020-21.
  - The actual projected overspend of a further £2.9 million means spend for the current financial year will exceed the original High Needs funding allocation by £5.7 million.
  - DSG reserves are projected to end the year with a deficit of £1.483 million as a result of the overspend in high needs budgets and the elements previously earmarked require replacing to meet potential commitments.

4.3. The allocation of an additional £7.5 million therefore is unlikely to release new money in to the high needs system in Buckinghamshire without further action being taken to reduce costs in future years both to reduce high needs spend and to replenish DSG reserves. It is currently not known if this additional funding will continue in to future years and it is expected that future allocations will be influenced by the national review of SEND announced by the Government in the autumn of 2019, the outcomes of which are currently unknown.

### **Budget Proposals 2020-21**

4.4. Appendix 5 to this report outlines initial budget modelling for 2020-21. Table 4 below outlines the assumptions that have initially been applied:

<b>Pressure</b>	<b>Increase compared to 2019-20 budget</b>
	<b>£'000</b>
Estimated adjustment to Import/Export Adjustment to be applied to final funding settlement	120
Full Year effect of additional places funded from September 2019 in BCC special schools	789
Full Year Effect of additional post-16 places agreed in 2019-20	142
Apply 4% inflation to Special School top up budgets in line with NFF increase for mainstream schools	769
Apply 4% inflation to PRU top up budgets in line with NFF increase for mainstream schools	170
Independent Special School budget to be set in line with 2019-20 outturn	561
Post 16 placement costs to reflect 2019-20 overspend and comparable growth in 2020-21	1,000
Funding to support EHCPs in mainstream schools - budget to be increased to reflect 2019-20 spend and similar rate of growth in 2020-21	1,936
<b>Total Increase compared with 2019-20 Budget</b>	<b>5,486</b>

4.5. These additional pressures give proposed spend of £90.866 million against a funding allocation of £90.059 million, a shortfall against available funding of **£807k**. Whilst it has been identified in section 5 of this report that there remains £884k unallocated historic commitment funding within the Central Schools Services Block, utilisation of this amount would mean that no funding is available to reduce the

deficit in the DSG reserve and this would not be recommended as an approach. Further reduction therefore need to be made in the proposed spend for 2020-21.

4.6. The table below outlines a number of options that can be applied to reduce spend in 2020-21:

<b>Table 5</b>		
<b>Options to Reduce Spend in 2020-21</b>		
	<b>£'000</b>	<b>Note/Risk</b>
Expected reduction in rate of increase in EHC Assessments.	-346	Increase in 2019-20 year included significant backlog of plans therefore rate should be lower in 2020-21. Also need to reflect impact of other initiatives such as Speechlink, Ordinarily Available Provision, etc
Review of Phase Transfers to reduce spend on Independent Special School placements	-250	Medium to High Risk as this requires a reduction of £250k against current year spend. Individual placements being reviewed , new SEN Panel processes have reduced new placements agreed.
Reduce rate of growth in post-16 College placements	-250	High Risk - demand for post-16 is increasing and responsibility for age range up to 25 means some placements continuing longer
Strategic review of central services funded from High Needs Block	-75	review required of all support services funded from High Needs block
Action Plan from Impower project	0	To be quantified - impact more likely in future years?
	<b>-921</b>	

4.7. Schools Forum is asked to consider the options above in order to set a balanced budget for 2020-21. As noted in the comments, some of the options carry higher risk than others as budgets are demand led.

4.8. In the longer term a recovery plan for high needs spend is required, to incorporate the action plan agreed following the Impower project and the draft Sufficiency Strategy, focussed on reducing demand and prioritising earlier intervention to reduce high cost packages of support and meet needs within local provision. It is therefore proposed that Schools Forum agree actions to enable the 2020-21 budget to be balanced and that a more detailed recovery plan covering the next 3 years is brought to the March 2020 meeting.

4.9. Schools Forum is asked to consider and agree proposals to meet the projected shortfall in the high needs budget for 2020-21 and that further proposals for future years are presented at the March 2020 Schools Forum meeting



## SECTION C

### 5. Central Schools Services Block 2020-21 – Historical Commitments and On-going responsibilities

5.1. The DfE defines the central school services block (CSSB) within the DSG as funding for local authorities to carry out central functions on behalf of maintained schools and academies. The block will continue to comprise two distinct elements: ongoing responsibilities and historic commitments.

- **On-going responsibilities** funding is based on a per-pupil formula and the DfE will continue to reduce this by a maximum of minus 2.5% year on year. For Buckinghamshire the increase in pupil numbers in the October 2019 census has meant the allocation for 2020-21 is higher than indicative figures.
- For **Historical Commitments**, the reduction will be by 20% as part of the fairer funding system, and the DfE stated ‘We will continue to unwind this funding in future years, and will provide further details in due course.’ The DfE have also stated that ‘with the approval of the schools forum, an authority can maintain spending in this area using other funding sources if they wish to.’ This is not an option for BCC, for reasons already discussed in this report. Details of Historic Commitments for BCC were set out in the December 2019 report.

5.2. Table below shows the projected impact of these reductions:

<b>Table 4: Central Schools Services Block (CSSB) : projected DSG Allocations</b>						
	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>	<b>2023-24</b>	<b>2024-25</b>
<b>On-going commitments (2.5% reduction in unit rate each year from 2020-21)</b>						
reduction each year from	£37.50	£36.56	£35.65	£34.75	£33.89	£33.04
*Pupil numbers -census data	73903	74701.5	74701.5	74701.5	74701.5	74701.5
Total On-going commitments	£2,771,363	£2,731,087	£2,662,810	£2,596,239	£2,531,333	£2,468,050
Reduction in DSG each year	0	(£40,276)	(£68,277)	(£66,570)	(£64,906)	(£63,283)
<b>Historic Commitments 20% reduction on 2019-20 figures each year (£930,800 reduction each year)</b>						
	£4,654,000	£3,723,200	£2,792,400	£1,861,600	£930,800	£0
<b>Total CSSB Allocation</b>	<b>£7,425,363</b>	<b>£6,454,287</b>	<b>£5,455,210</b>	<b>£4,457,839</b>	<b>£3,462,133</b>	<b>£2,468,050</b>
* For 2021-22 onwards - assume same pupil numbers as Oct 2019 census						

5.3. Appendix 6 details the budget plans for the next 5 years. In light of the funding reductions in on-going commitments and as part of BCC’s move to comply with the DfE’s operational guidance on admission appeals, the Local authority is proposing to charge some schools from April 2020 where BCC is the admissions authority. For these schools the service is free with costs met from a CSSB budget, currently



totalling £138k. The proposals will bring these schools in line with schools that are their own admissions authority who pay for this service, and will allow this budget to be reduced. The DfE guidance states ‘although admissions appeals are not a duty that the local authority holds in relation to all schools, we would still expect all schools to be treated fairly and equitably by the local authority’. A separate paper further down in the agenda, sets out the charging proposals for agreement by Schools Forum.

5.4. Historic commitment’s 20% reduction will be taken from the Capital Expenditure from Revenue (CERA) unallocated budget of £1,708,000 in the first instance. In 2019-20 Schools Forum agreed to use this unallocated budget for High Needs. The balance of £844k in 2020-21 is part of the DSG reserve recover plan as detailed in budget monitoring report earlier on in the agenda.

5.5. As a result of the expected reduction in both elements of the CSSB, Table 7 shows the savings that will need to be made across the CSSB over the next 5 years:

<b>Table 7 :CSSB</b>	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>	<b>2023-24</b>	<b>2024-25</b>
Total savings to be found:	0	0	(£186,730)	(£1,216,708)	(£2,245,883)	(£3,274,273)

Plans to meet this savings target will be brought back to Schools Forum in 2020-21.

5.6. Schools Forum members are recommended to

- note the information set out in the report
- to agree the budget proposals set out in appendix 6
- To agree that detailed savings plans will be brought back to Schools Forum as part of the 2021-22 budget setting process.

## SECTION D

### 6. Early Years 2020-21

6.1. The Department of education (DfE) provides local authorities with six relevant funding streams which together form the Early Years block of the Dedicated Schools Grant (DSG). They are:

- the early years universal entitlement for three and four year olds (15 hours)
- the early years additional entitlement for three and four year old children of eligible working parents (additional 15 hours)
- the early years entitlement for disadvantaged two year olds (15 hours)
- supplementary funding for Maintained Nursery Schools (MNS)
- the Early Years Pupil Premium (EYPP)
- the Disability Access Fund (DAF), £615 per pupil per year

6.2. The 2020-21 Early Years National Funding Formula (EYNFF) allocation to (BCC) is shows an increase on last year of £0.08 in the hourly rate to the local authority:

- LA hourly rate for 3 and 4 year olds is £4.72 was £4.64 in 2019-20
- LA hourly rate for 2 year old entitlement is £5.79 was £5.71 in 2019-20

6.3. The 2020-21 initial allocations are based on January 2019 census data as are the 2019-20 (November 2019) allocations. The DfE will update both with data from the January 2020 census data and at this stage BCC are expecting increased pupil numbers resulting in additional funding for both 2019-20 and 2020-21. The initial allocations compared to 2019-20 are shown below:

Early Years Initial Allocations 2020-21	universal entitlement for 3 and 4 year olds £m	additional 15 hours entitlement 3 and 4 year olds £m	funding allocation for 2 year old entitlement £m	early years pupil premium £m	disability access fund £m	supplementary funding allocation for maintained nursery schools £m	Total early years block £m
DfE December 2019 allocations	21.63	7.10	2.94	0.11	0.11	0.22	32.10
Final Allocations 2019-20	21.27	6.97	2.90	0.11	0.09	0.22	31.56
Change	0.37	0.12	0.04	0.00	0.02	0.00	0.54

6.4. Local authorities are required to pass at least 95% of their three and four year old funding from Government to early years providers. This pass-through requirement ensures that the vast majority of Government funding reaches providers so that they

can deliver the free entitlements. Excluded from this calculation (and from BCC's local funding formula) is the funding for: the entitlement for disadvantaged two year olds; payments to MNS from the MNS supplementary funding allocation; the Disability Access Fund (DAF) and the Early Years Pupil Premium (EYPP).

- 6.5. There is no pass-through requirement for 2 year olds, but BCC will continue to allocate 5% of the 2 year old funding to central spend to support this service provision, as agreed in the last 3 years.
- 6.6. Local authority compliance with the 95% pass-through requirement is measured with reference to local authorities' planned budgets. The DfE will monitor compliance via the annual s251 budget returns and may consider the future use of s251 outturn data to monitor compliance with the pass-through.
- 6.7. The local authority's Early Year's funding formula for 3-4 year olds allocates funding to settings based on agreed criteria. Last year the Early Years Forum agreed to set the 2019-20 3-4 year old funding for the Inclusion Fund at £375,000, Contingency at £75,000 and the local supplement Service Children Pupil Premium at £22,000. Budget forecasts for this year suggest this level of funding is sufficient for 2019-20 and BCC are proposing that these levels are maintained for 2020-21. BCC propose to allocate the rest of the funding between the hourly rate and deprivation factor in similar proportions to last year.
- 6.8. The table below sets out the BCC's formula and proposed rates for 3-4 year olds to meet the 95% high pass through requirement as well as the funding formula and hourly rate for 2 year olds:

Early Years 2020-21	DfE Budget	Hourly Formula	Notes
Funding Formula	Allocation (£)	£	
Universal 3 & 4 year olds	£21,633,103		
Additional 15 Hours 3 & 4 year olds	£7,095,016		Working parents
<b>Total</b>	<b>£28,728,119</b>	£4.72	Amount allocated to LA
<b>2020-21 Summary of Buckinghamshire's Early Years Funding Formula for 3 and 4 year olds:</b>			
	Budget (£)	Hourly rate	Notes
Base hourly rate	£26,346,585	£4.33	
Deprivation (Average)	£473,128	£0.08	Allocated on family economic criteria
Optional supplements	22,000	£0.00	Local agreement, Service Children Pupil Premium
Contingency	£75,000	£0.01	Allocated on setting sustainability criteria
Inclusion Fund	£375,000	£0.06	Low level and emerging SEND, allocated on assessment
<b>Total 95% High pass-through rate</b>	<b>£27,291,713</b>	<b>£4.48</b>	<b>95% of £4.72</b>
Total Central spend 5%	£1,436,406	£0.24	5% of £4.72
<b>Total Budget</b>	<b>£28,728,119</b>	<b>£4.72</b>	<b>100%</b>
2020-21	DfE Budget	Hourly Formula	Notes
	Allocation (£)		
2 year old funding:	£2,937,499	£5.79	Amount to LA
<b>2020-21 Summary of Buckinghamshire County Council's Early Years Funding Formula for 2yr. olds:</b>			
	Budget (£)	Hourly rate	Notes
Provider rate	£2,790,624	£5.50	95% of £5.79
5% central spend	£146,875	£0.29	5% of £5.79
<b>Total Budget</b>	<b>£2,937,499</b>	<b>£5.79</b>	<b>100%</b>

6.9. Therefore, School Forum members are recommended to agree the proposals in 6.8 but with the provision that the Early Years Forum can make minor amendments. Final decisions will be brought back to School Forum in March 2020.

## SECTION D

### 7. Recommendations

7.1. Schools Forum is requested to note the information on each of the DSG funding blocks and to take the information in to account when considering the Schools Budget Proposals Decision Paper.



<b>Illustrative Funding Rates Funding Factors</b>	<b>2019/20 Final Budget Rates</b>	<b>2020/21 Indicative Model 1 (0.5% MFG)</b>	<b>2020/21 Final Model 1 (0.5% MFG)</b>
Scaling factor (% of NFF)	99.17%	100.00%	100.00%
Primary AWPU	£ 2,800.83	£ 2,938.80	£ 2,938.80
KS3 AWPU	£ 3,938.35	£ 4,133.04	£ 4,133.04
KS4 AWPU	£ 4,471.77	£ 4,691.58	£ 4,691.58
Primary MFL	£ 3,470.99	£ 3,750.00	£ 3,750.00
Secondary MFL	£ 4,760.22	£ 5,000.00	£ 5,000.00
Primary FSM	£ 448.62	£ 462.88	£ 462.88
Secondary FSM	£ 448.62	£ 462.88	£ 462.88
Primary FSM6	£ 550.58	£ 576.03	£ 576.03
Secondary FSM6	£ 800.39	£ 838.33	£ 838.33
Primary IDACI band F	£ 203.92	£ 216.01	£ 216.01
Secondary IDACI band F	£ 295.68	£ 308.59	£ 308.59
Primary IDACI band E	£ 244.70	£ 257.16	£ 257.16
Secondary IDACI band E	£ 397.64	£ 416.60	£ 416.60
Primary IDACI band D	£ 367.06	£ 385.74	£ 385.74
Secondary IDACI band D	£ 525.09	£ 550.32	£ 550.32
Primary IDACI band C	£ 397.64	£ 416.60	£ 416.60
Secondary IDACI band C	£ 570.98	£ 596.61	£ 596.61
Primary IDACI band B	£ 428.23	£ 447.45	£ 447.45
Secondary IDACI band B	£ 611.76	£ 642.89	£ 642.89
Primary IDACI band A	£ 586.27	£ 617.18	£ 617.18
Secondary IDACI band A	£ 825.88	£ 864.05	£ 864.05
Primary Low Attainment	£ 1,042.03	£ 1,095.49	£ 1,095.49
Secondary Low Attainment	£ 1,580.38	£ 1,656.09	£ 1,656.09
Primary EAL	£ 525.09	£ 550.32	£ 550.32
Secondary EAL	£ 1,412.14	£ 1,481.32	£ 1,481.32
Primary Mobility	£ 508.50	£ 900.05	£ 900.05
Secondary Mobility	£ 508.50	£ 1,285.79	£ 1,285.79
Lump Sum	£ 112,155.88	£ 117,675.27	£ 117,675.27
Sparsity Primary (up to)	£ 25,489.97	£ 26,744.38	£ 26,744.38
Sparsity secondary (up to)	£ 66,273.93	£ 69,535.39	£ 69,535.39
MFG	-1.50%	0.50%	0.50%
Capping	3.13%	7.92%	No Cap
Fringe uplift where applicable	1.56%	1.75%	1.75%

All funding rates include the Area Cost Adjustment (ACA)

No. of Schools Protected	28	4	5
No. of Schools Capped	50	19	0





<b>Illustrative Funding Levels Funding Factors</b>	<b>2019/20 Final Rates</b>	<b>2020/21 Indicative Model 1 (0.5% MFG)</b>	<b>2020/21 Final Model 1 (0.5% MFG)</b>
Scaling factor (% of NFF)	99.17%	100.00%	100.00%
Primary AWPU	£123,288,335	£128,884,013	£129,533,488
KS3 AWPU	£72,481,393	£76,064,468	£78,085,525
KS4 AWPU	£52,073,762	£54,633,449	£55,468,550
Primary MFL	£476,527	£1,458,507	£1,733,826
Secondary MFL	£4,195,967	£4,440,552	£4,363,317
Primary FSM	£1,618,936	£1,662,202	£2,009,332
Secondary FSM	£781,047	£805,874	£958,624
Primary FSM6	£3,068,100	£3,196,085	£3,239,934
Secondary FSM6	£3,239,663	£3,393,229	£3,412,607
Primary IDACI band F	£572,239	£604,117	£602,051
Secondary IDACI band F	£598,518	£624,650	£613,511
Primary IDACI band E	£832,656	£865,682	£897,811
Secondary IDACI band E	£715,851	£749,983	£790,805
Primary IDACI band D	£54,544	£57,094	£54,880
Secondary IDACI band D	£100,302	£105,121	£102,917
Primary IDACI band C	£212,285	£221,664	£231,439
Secondary IDACI band C	£167,878	£175,414	£184,366
Primary IDACI band B	£34,498	£35,796	£37,737
Secondary IDACI band B	£31,204	£32,792	£33,442
Primary IDACI band A	£3,552	£3,703	£4,975
Secondary IDACI band A	£5,781	£6,048	£4,320
Primary Low Attainment	£14,224,251	£14,897,051	£13,486,620
Secondary Low Attainment	£7,572,843	£7,935,629	£8,362,561
Primary EAL	£2,372,501	£2,473,876	£2,299,871
Secondary EAL	£744,415	£780,836	£750,610
Primary Mobility	£189,102	£390,326	£383,659
Secondary Mobility	£6,305	£24,413	£4,860
Lump Sum	£24,739,718	£25,888,559	£25,888,559
Sparsity Primary (up to)	£31,786	£63,522	£78,543
Sparsity secondary (up to)	£20,434	£42,880	£39,172
MFG	£415,817	£159,854	£186,421
Capping	-£415,784	-£104,686	£0
Other factors	£209,179	£209,179	£206,849
Rates	£3,621,660	£3,989,312	£4,124,232
Fringe uplift where applicable	£1,493,760	£1,753,880	£1,736,081
<b>Total through funding formula</b>	<b>£319,779,037</b>	<b>£336,525,074</b>	<b>£339,911,493</b>
Growth Fund	£2,391,935	£2,803,997	£3,723,495
<b>Total cost to schools block</b>	<b>£322,170,972</b>	<b>£339,329,071</b>	<b>£343,634,988</b>
Pupil Led Funding	£316,467,069	£332,694,234	£336,666,466
Premises Funding	£3,415,825	£3,830,839	£3,830,840
Growth Funding	£2,288,078	£2,803,997	£3,137,682
<b>Transfer from Reserves</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>
<b>Total Funding Available</b>	<b>£322,170,972</b>	<b>£339,329,070</b>	<b>£343,634,988</b>

No. of Schools Protected	28	4	5
No. of Schools Capped	50	19	0



Illustrative School Level Funding - School Name	Final Budget 2019/20	2020/21 Indicative Model1 (0.5% MFG)	2020/21 Final Model 1 (0.5% MFG)	MFG 2019/20	Indicative MFG Model 1 (0.5% MFG)	Final MFG Model 1 (0.5% MFG)	Pupil No.s October 2018	Pupil No.s October 2019*
The Disraeli School *	2,350,299	2,464,839	2,607,402	0	0	0	578	623
Oak Green School *	2,045,736	2,155,056	2,334,223	0	0	0	519	564
Buckingham Park C of E School	1,608,819	1,692,629	1,658,274	0	0	0	416	412
Cedar Park School	742,930	792,195	796,649	0	0	0	205	206
Millbrook Combined School *	2,000,388	2,151,926	2,307,138	0	0	0	503	550
Mary Towerton School *	290,882	301,545	381,544	4,719	0	0	47	69
Bledlow Ridge School	619,356	652,519	672,815	0	0	0	163	170
The Downley School	1,499,148	1,616,448	1,610,641	0	0	0	416	414
Chalfont Valley E-ACT Primary Academy	665,538	697,041	674,724	0	0	0	151	145
Princes Risborough Primary Academy	1,031,274	1,082,974	1,029,394	0	0	0	269	261
Denham Green E-ACT Primary Academy	785,652	827,862	835,351	0	0	0	185	188
Lace Hill Academy	635,143	669,927	716,114	0	0	0	156	169
Chalfont St Giles Infant School	599,386	618,888	653,496	9,908	0	0	145	152
George Grenville Academy	716,805	744,305	778,841	12,152	0	0	169	180
Ivingswood Academy	869,066	928,579	827,552	-12,324	-2,849	0	184	163
Cheddington Combined School	762,613	806,515	835,262	-708	0	0	201	212
Chenies School	456,333	483,312	481,552	-15,455	-2,348	0	107	101
Newtown Infant School	757,038	798,042	802,146	0	0	0	179	178
Dagnall School *	231,832	237,125	279,533	2,971	0	0	33	43
Denham Village Infant School *	220,988	228,810	328,402	1,187	-2,908	0	27	56
Dorney Academy	748,167	781,547	736,267	0	0	0	195	183
Drayton Parslow Village School	254,041	258,805	271,179	4,591	0	0	43	44
Dropmore Infant School	301,652	312,237	326,641	1,987	0	0	58	61
East Claydon School *	346,344	362,326	430,001	10,504	0	0	66	88
Edlesborough School	781,493	820,691	818,673	0	0	0	204	205
Fulmer Infant School	323,998	338,095	360,050	2,226	0	0	65	74
Roundwood Primary School	730,106	736,200	758,230	57,477	28,798	34,516	168	175
Haddenham Community Infant School	378,404	398,897	407,973	0	0	0	86	88
Marsh First School	753,534	789,131	785,976	0	0	0	171	171
West Wycombe Combined School	603,545	632,659	595,867	0	0	0	140	130
Hyde Heath Infant School	334,432	352,144	347,766	-2,829	0	0	69	68
Ickford Combined School	500,683	532,525	529,418	-2,660	-1,223	0	130	127
Iver Village Junior School	924,142	974,904	926,890	0	0	0	223	219
Jordans School	323,167	339,287	339,934	0	-561	0	66	65
Ley Hill School	800,289	849,272	851,291	-3,571	0	0	209	210
Little Kingshill Combined School	789,951	830,870	824,351	0	0	0	212	212
Prestwood Infant School	648,443	683,722	706,272	0	0	0	166	171
Steeple Claydon School	644,187	681,018	735,987	0	0	0	162	178
Stoke Mandeville Combined School	757,085	792,757	845,529	0	0	0	196	210
Thornborough Infant School	237,602	246,500	196,790	3,559	0	0	35	22

Illustrative School Level Funding - School Name	Final Budget 2019/20	2020/21 Indicative Model1 (0.5% MFG)	2020/21 Final Model 1 (0.5% MFG)	MFG 2019/20	Indicative MFG Model 1 (0.5% MFG)	Final MFG Model 1 (0.5% MFG)	Pupil No.s October 2018	Pupil No.s October 2019*
Tylers Green First School	666,715	702,608	695,071	-6,103	0	0	176	171
The Meadows Combined School	622,442	653,141	671,596	0	0	0	140	143
Booker Hill School	894,432	937,834	919,724	0	0	0	209	206
Ash Hill Primary School	980,600	1,023,007	997,360	14,204	0	0	209	209
Farnham Common Junior School	888,118	947,057	949,513	-10,416	0	0	236	236
Woodside Junior School	923,450	961,153	974,435	15,723	0	0	238	242
Holmer Green First School	683,865	723,233	713,159	0	0	0	174	175
Chalfont St Peter Infant School	642,294	680,994	707,116	0	0	0	171	174
Broughton Junior School	924,935	973,699	957,690	0	0	0	238	241
Little Chalfont Primary School	830,217	875,522	850,390	0	0	0	223	219
Carrington Junior School	923,185	979,087	1,012,671	-6,970	0	0	235	243
Haydon Abbey Combined School	1,793,196	1,885,388	1,869,102	0	0	0	451	452
Grendon Underwood Combined School	683,743	728,583	755,346	-7,174	0	0	178	187
Iver Heath Junior School	945,492	995,423	958,042	0	0	0	232	228
Bedgrove Junior School	1,653,720	1,781,250	1,812,450	-11,957	0	0	475	483
Bedgrove Infant School	1,241,758	1,337,852	1,356,800	0	0	0	356	360
Carrington Infant School	734,833	775,147	784,277	-528	0	0	181	182
Broughton Infant School	697,622	737,008	752,357	0	0	0	177	181
Elmhurst School	1,707,292	1,740,883	1,738,368	0	0	0	406	408
Chalfont St. Giles Junior School	876,257	928,708	925,337	0	0	0	228	234
Oakridge School	1,627,314	1,702,200	1,752,306	0	0	0	376	392
Butlers Court Combined School	1,506,561	1,616,742	1,580,157	-283	0	0	423	413
The John Hampden School	897,091	972,386	1,040,482	0	0	0	254	272
Chestnut Lane Infant School	701,574	741,370	741,577	0	0	0	179	180
Manor Farm Infant School	844,445	889,918	875,590	0	0	0	220	217
Chartridge Combined School	803,131	847,370	849,668	0	0	0	208	209
Juniper Hill School	1,484,254	1,603,224	1,589,071	0	0	0	420	416
Holmer Green Junior School	916,347	979,928	987,648	-14,757	-169	0	243	247
Tylers Green Middle School	915,561	984,222	985,061	-6,359	0	0	255	255
Prestwood Junior School	891,039	946,869	952,146	-10,202	0	0	235	235
Thomas Harding Junior School	968,058	1,017,609	1,003,858	0	0	0	240	239
Elmtree School	783,825	834,500	835,983	-5,198	0	0	176	179
Thomas Hickman School	1,697,129	1,783,367	1,789,355	0	0	0	407	410
Burford School	1,474,454	1,592,839	1,597,462	0	0	0	417	418
Bearbrook Combined School	1,755,555	1,810,191	1,806,661	-6,178	0	0	451	451
Lent Rise Combined School	1,593,053	1,687,166	1,680,484	0	0	0	447	448
Lane End Primary School	742,340	790,238	765,452	0	0	0	164	164
Chepping View Primary Academy	1,705,111	1,769,802	1,746,982	10,110	0	0	428	430
Hannah Ball Infant School	806,798	853,889	816,761	0	0	0	180	172
Claytons Primary School	1,102,587	1,167,780	1,172,588	0	0	0	302	303

Illustrative School Level Funding - School Name	Final Budget 2019/20	2020/21 Indicative Model1 (0.5% MFG)	2020/21 Final Model 1 (0.5% MFG)	MFG 2019/20	Indicative MFG Model 1 (0.5% MFG)	Final MFG Model 1 (0.5% MFG)	Pupil No.s October 2018	Pupil No.s October 2019*
Hughenden Primary School *	798,857	837,800	862,247	-7,193	0	0	196	204
Buckingham Primary School	1,516,411	1,639,896	1,532,643	0	0	0	426	395
Aston Clinton School	1,451,353	1,533,042	1,522,896	-11,346	0	0	403	396
Whitchurch Combined School	789,494	833,148	827,947	-3,246	0	0	208	208
Widmer End Combined School	820,447	867,418	862,024	-72	0	0	210	212
Spinfield School	792,536	836,946	817,254	0	0	0	212	207
Waterside Combined School	665,793	702,269	698,788	-2,325	0	0	147	143
Long Crendon School	760,748	803,589	800,272	0	0	0	208	207
Manor Farm Community Junior	909,576	958,300	939,664	0	0	0	240	235
Stokenchurch Primary School	1,661,728	1,795,128	1,684,057	0	0	0	466	436
Iver Heath Infant School	721,637	756,628	763,268	7,839	0	0	173	176
Farnham Common Infant School	668,298	702,376	701,612	0	0	0	168	164
Haddenham Junior School *	1,095,646	1,189,302	1,319,819	0	0	0	307	342
Turnfurlong Junior School	1,317,899	1,368,164	1,363,195	-7,727	0	0	360	361
Elangeni School	880,050	937,347	923,504	-6,627	0	0	241	239
Ashmead Combined School	2,342,127	2,456,939	2,442,949	0	0	0	631	631
William Harding Combined School *	2,495,945	2,650,218	2,871,362	0	0	0	692	750
Turnfurlong Infant School	1,027,175	1,076,604	1,075,284	0	0	0	270	269
Robertswood School	1,369,157	1,448,808	1,367,472	0	0	0	376	354
Iver Village Infant School	672,197	708,528	722,666	47	0	0	164	168
Waddesdon Village Primary School	823,612	863,673	862,579	0	0	0	219	221
Halton Community Combined School	770,737	811,202	822,385	0	0	0	203	206
Naphill and Walters Ash School	1,380,147	1,485,996	1,426,926	0	0	0	388	372
The Bourton Meadow Academy	2,110,873	2,256,078	2,233,929	0	0	0	602	593
Holtspur School	897,996	972,300	966,918	0	0	0	226	223
Highworth Combined School	1,690,164	1,770,603	1,766,248	0	0	0	413	417
The Stoke Poges School	1,597,192	1,683,221	1,668,298	-8,293	0	0	430	427
Foxes Piece School	911,646	968,890	837,293	0	0	0	218	192
St James & St John C of E Primary School	679,654	682,904	686,761	57,553	23,307	37,261	155	157
Marsh Gibbon C of E School	615,796	653,333	645,575	-6,835	0	0	165	163
North Marston C of E School	416,382	433,074	442,839	0	0	0	94	98
Padbury Cof E School	457,302	459,001	460,802	43,269	24,615	28,512	99	99
St Michaels C of E Combined School	843,928	868,101	776,834	0	0	0	228	201
Whaddon First School	293,060	292,738	256,251	11,303	0	0	52	39
St Mary's C of E School	1,579,860	1,679,002	1,694,197	0	0	0	446	450
Bierton C of E Combined School	1,033,876	1,073,488	1,088,630	0	0	0	285	289
Brill C E School	686,794	717,474	741,556	0	0	0	185	191
High Ash C of E School	1,008,298	1,053,186	1,120,734	-16,719	0	0	279	297
Stone C of E Combined School	764,332	805,910	824,805	-5,975	0	0	204	208
Wendover C of E Junior School	1,330,115	1,423,862	1,457,915	0	0	0	377	386



Illustrative School Level Funding - School Name	Final Budget 2019/20	2020/21 Indicative Model1 (0.5% MFG)	2020/21 Final Model 1 (0.5% MFG)	MFG 2019/20	Indicative MFG Model 1 (0.5% MFG)	Final MFG Model 1 (0.5% MFG)	Pupil No.s October 2018	Pupil No.s October 2019*
Weston Turville C of E School	787,042	831,238	833,638	0	0	0	201	207
Wingrave C of E Combined School	743,839	774,091	795,563	0	0	0	191	198
St George's C of E Infant School	724,598	763,586	742,083	-2,350	0	0	178	175
Chesham Bois C of E Combined School	782,561	825,110	826,516	0	0	0	215	216
Coleshill C of E Infant School	271,520	284,239	293,272	0	-1,714	0	48	49
Great Missenden C of E Combined School	1,489,666	1,610,467	1,611,956	0	0	0	428	427
Lee Common C of E School	250,354	260,948	288,697	-4,175	-6,667	0	40	47
Curzon C of E Combined School	613,995	645,401	647,280	0	0	0	149	151
Great Kimble C of E School *	277,449	286,121	353,798	4,782	0	0	52	72
Great Kingshill C of E Combined School	1,408,985	1,522,205	1,518,614	0	0	0	404	403
Longwick C of E Combined School	695,067	729,362	702,990	0	0	0	184	176
Marlow C of E Infant School	680,022	713,736	700,862	0	0	0	181	178
Monks Risborough C of E Primary School	800,845	843,707	841,353	0	0	0	207	206
St. Mary's Farnham Royal Church of England Primary School	1,149,048	1,199,319	1,178,569	0	0	0	283	279
Twyford C of E School	408,730	426,481	444,524	-7,173	-5,707	0	93	97
Maids Moreton C of E School	275,109	287,965	266,674	0	-870	0	49	43
Newton Longville C of E Primary School	793,272	835,556	824,168	0	0	0	208	207
Great Horwood C of E Combined School	517,426	548,348	406,355	-23,621	-21,539	0	127	73
Westcott C of E School	379,945	399,680	412,544	0	0	0	83	89
Mursley C of E School	254,481	261,712	273,571	0	-1,537	0	42	44
Hawridge & Cholesbury School	797,190	838,391	832,345	0	0	0	198	199
Haddenham St Marys C of E School	609,218	631,423	684,872	0	0	0	162	178
Quinton C of E Combined	603,353	630,717	734,047	-33,437	-34,189	0	147	168
Oakley C of E Combined School	423,498	437,712	402,734	-668	0	0	95	85
Winslow C of E Combined School	1,174,225	1,210,928	1,269,681	-8,679	0	0	315	331
St Peter's C of E Combined School	867,750	913,007	871,888	5,389	0	0	217	211
Swanbourne C of E School	586,603	589,486	589,545	104,451	83,133	81,359	120	120
Cuddington & Dinton C of E School	706,009	716,696	702,403	22,708	0	4,772	176	174
Marsworth C of E Infant School	195,682	201,821	219,903	917	-2,098	0	24	26
St Mary's C of E Primary School	1,189,179	1,259,455	1,252,164	0	0	0	336	332
Chalfont St Peter Church of England Academy	1,232,581	1,321,925	1,312,725	-14,982	0	0	351	350
Little Missenden C of E Infant School	261,285	273,128	267,813	1,340	-496	0	44	42
Seer Green C E School	792,322	828,980	832,820	0	0	0	209	212
St Mary & All Saints C of E Primary School	1,460,557	1,577,600	1,566,541	0	0	0	419	416
Cadmore End C of E Combined School	321,824	338,077	356,775	-2,974	-4,979	0	62	64
Frieth C of E Combined School	545,217	573,511	524,561	-1,730	0	0	135	122
Hazlemere C of E Combined School	804,095	847,297	829,565	-1,679	0	0	210	210
High Wycombe C of E Combined School	796,270	836,257	821,476	-7,181	0	0	203	198
Ibstone C of E Infant School	276,520	287,213	341,221	0	-14,240	0	45	58
St John's C of E Combined School	847,605	899,673	878,424	0	0	0	240	233

Illustrative School Level Funding - School Name	Final Budget 2019/20	2020/21 Indicative Model1 (0.5% MFG)	2020/21 Final Model 1 (0.5% MFG)	MFG 2019/20	Indicative MFG Model 1 (0.5% MFG)	Final MFG Model 1 (0.5% MFG)	Pupil No.s October 2018	Pupil No.s October 2019*
Little Marlow C of E School	370,472	388,900	389,000	0	0	0	80	80
Radnage C of E Primary School	406,483	430,322	382,803	0	-586	0	95	82
Speen C of E School	191,195	197,217	182,987	0	-7	0	23	18
St Paul's C of E Combined School	805,285	847,507	844,225	0	0	0	216	218
St Nicolas C of E Combined School Taplow	828,188	871,077	855,097	0	0	0	216	215
Holy Trinity C of E School	1,221,104	1,305,786	1,328,422	0	0	0	347	353
St Peter's Catholic Primary School	739,103	785,388	675,639	-12,196	0	0	191	159
St Edward's Catholic Junior School	970,861	1,021,430	1,011,637	0	0	0	253	257
St. Joseph's Catholic Primary School	1,330,375	1,423,511	1,359,419	-20,587	0	0	373	356
St Joseph's Catholic Infant School	741,624	780,412	767,362	-7,291	0	0	181	175
Our Lady's Catholic Primary School	821,469	866,740	872,057	-2,869	0	0	218	218
St Louis Catholic Primary School *	1,245,428	1,307,527	1,444,262	539	0	0	332	380
King's Wood School	1,723,971	1,812,477	1,764,264	0	0	0	418	415
Chiltern Hills Academy *	4,141,282	4,351,550	4,696,490	0	0	0	804	865
The Highcrest Academy *	4,299,548	4,512,575	4,769,258	0	0	0	797	845
Burnham Park E-ACT Academy	1,415,782	1,515,787	0	-20,585	0	0	236	0
Buckinghamshire UTC	798,776	836,460	578,945	1,223	0	0	127	70
The Buckingham School *	4,477,101	4,692,749	5,035,385	0	0	0	894	957
Sir Thomas Fremantle	2,060,315	2,197,443	2,279,791	-13,872	0	0	415	431
Khalsa Secondary Academy	2,185,988	2,277,495	2,508,965	0	0	0	401	452
Bourne End Academy	3,054,334	3,179,185	3,874,550	0	0	0	575	705
John Hampden Grammar School	3,792,261	3,982,713	4,148,841	0	0	0	790	823
The Grange School	5,783,130	6,065,657	6,083,209	0	0	0	1,173	1,169
Princes Risborough School	3,859,633	4,115,629	4,211,624	-13,352	0	0	782	796
The Misbourne School	4,322,794	4,543,734	4,569,432	0	0	0	893	891
John Colet School	4,494,999	4,721,790	4,762,885	0	0	0	939	947
Burnham Grammar School	3,975,724	4,175,458	4,281,423	0	0	0	830	851
Aylesbury High School	4,390,077	4,610,524	4,596,819	0	0	0	915	912
Dr. Challoner's High School	4,238,201	4,451,134	4,587,216	0	0	0	884	911
Sir Henry Floyd Grammar School	4,209,035	4,491,800	4,610,000	0	0	0	889	916
Mandeville School *	4,447,854	4,653,766	5,099,140	0	0	0	834	927
Holmer Green Senior School *	3,961,907	4,163,828	4,558,744	0	0	0	788	874
Cressex Community School	4,005,663	4,200,026	4,202,862	0	0	0	745	749
Chesham Grammar School	4,400,912	4,619,208	4,630,321	0	0	0	907	909
The Beaconsfield School	3,742,679	3,932,595	3,890,097	0	0	0	738	733
Sir William Ramsay School	4,634,081	4,865,193	5,035,904	0	0	0	913	937
Amersham School *	3,729,836	3,920,204	4,190,434	0	0	0	756	811
Aylesbury Grammar School	4,426,131	4,649,450	4,673,714	0	0	0	922	927
The Royal Latin School	4,231,897	4,428,666	4,405,211	0	0	0	877	872
Wycombe High School	4,578,088	4,777,320	4,778,299	0	0	0	949	949

Illustrative School Level Funding - School Name	Final Budget 2019/20	2020/21 Indicative Model1 (0.5% MFG)	2020/21 Final Model 1 (0.5% MFG)	MFG 2019/20	Indicative MFG Model 1 (0.5% MFG)	Final MFG Model 1 (0.5% MFG)	Pupil No.s October 2018	Pupil No.s October 2019*
Dr Challoner's Grammar School	4,454,357	4,678,143	4,650,026	0	0	0	928	922
Sir William Borlase's Grammar	3,174,546	3,336,334	3,357,216	0	0	0	660	665
Saint Michael's Catholic School *	5,256,339	5,524,628	6,987,389	-5,488	0	0	1,197	1,498
Brookmead School	1,156,871	1,249,536	1,287,172	0	0	0	332	342
Overstone Combined School	918,753	972,729	772,497	0	0	0	257	198
Hamilton Academy	2,309,809	2,434,044	2,396,911	-10,863	0	0	615	608
Beechview School	866,493	914,640	935,825	3,140	0	0	198	205
Castlefield School	2,319,051	2,444,059	2,166,509	0	0	0	545	490
Brushwood Junior School	1,093,779	1,155,304	1,157,141	0	0	0	285	287
Loudwater Combined School	810,068	853,733	853,824	0	0	0	208	209
Danesfield School	1,476,216	1,581,854	1,604,560	0	0	0	420	426
The Gerrards Cross C.E. School	1,464,938	1,583,094	1,575,106	0	0	0	420	420
Beaconsfield High School	4,269,121	4,485,101	4,490,862	0	0	0	891	892
Chalfonts Community College	6,378,737	6,703,315	6,528,236	0	0	0	1,300	1,262
Royal Grammar School	4,734,324	5,068,000	5,040,000	0	0	0	1,001	1,002
The Cottlesloe School	4,554,755	4,777,341	4,853,955	0	0	0	941	951
Waddesdon Church of England School	3,391,723	3,560,000	3,630,158	0	0	0	712	717
Great Marlow School	5,424,021	5,674,356	5,795,348	0	0	0	1,125	1,149
The Aylesbury Vale Academy *	6,541,090	6,870,704	7,869,131	0	0	0	1,355	1,549
Green Ridge Academy *	845,412	745,560	1,188,413	0	0	0	197	277
Abbey View Academy - (Open Sept 19) *	240,386	0	390,979	0	0	0	53	76
<b>INFANT SCHOOLS</b>	<b>25,455,269</b>	<b>26,752,449</b>	<b>27,220,526</b>	<b>63,885</b>	<b>-12,775</b>	<b>28,512</b>	<b>5,959</b>	<b>6,071</b>
<b>JUNIOR SCHOOL</b>	<b>18,534,161</b>	<b>19,620,034</b>	<b>19,720,275</b>	<b>57,115</b>	<b>82,965</b>	<b>81,359</b>	<b>4,893</b>	<b>4,960</b>
<b>COMBINED SCHOOLS</b>	<b>94,172,552</b>	<b>99,528,153</b>	<b>99,198,024</b>	<b>-16,490</b>	<b>10,589</b>	<b>76,549</b>	<b>24,579</b>	<b>24,592</b>
<b>PRIMARY ACADEMIES</b>	<b>29,780,014</b>	<b>31,014,580</b>	<b>31,578,449</b>	<b>-52,402</b>	<b>-25,611</b>	<b>0</b>	<b>7,754</b>	<b>7,809</b>
<b>PRIMARY TOTAL</b>	<b>167,941,997</b>	<b>176,915,215</b>	<b>177,717,275</b>	<b>52,108</b>	<b>55,167</b>	<b>186,421</b>	<b>43,185</b>	<b>43,432</b>
<b>UPPER SCHOOLS</b>	<b>28,524,842</b>	<b>29,914,166</b>	<b>32,261,939</b>	<b>-5,488</b>	<b>0</b>	<b>0</b>	<b>5,784</b>	<b>6,250</b>
<b>ACADEMIES</b>	<b>123,312,199</b>	<b>129,695,692</b>	<b>131,999,941</b>	<b>-46,586</b>	<b>0</b>	<b>0</b>	<b>25,099</b>	<b>25,584</b>
<b>SECONDARY SCHOOLS</b>	<b>151,837,041</b>	<b>159,609,858</b>	<b>164,261,880</b>	<b>-52,074</b>	<b>0</b>	<b>0</b>	<b>30,883</b>	<b>31,834</b>
<b>ALL SCHOOLS</b>	<b>319,779,038</b>	<b>336,525,074</b>	<b>341,979,154</b>	<b>34</b>	<b>55,167</b>	<b>186,421</b>	<b>74,068</b>	<b>75,266</b>

MFG Protection	415,817	159,854	186,421
Gains Cap	-415,783	-104,686	0

No. of Schools Protected	28	4	5
No. of Schools Capped	50	19	0

\* Schools now in receipt of growth fund for agreed pupil numbers will now see this funding in their school level details.

Pupil No.s October 2019 are based on the October 2019 Census used for DSG allocations plus growth funded pupils and reception uplift



Estimated Use of Growth Fund						
2019/2020				Revised		
DfES No.	School Name	Type	Sector	Additional Reception Pupils	Additional Yr7 Pupils	Total Additional Funding
<b>Expansion of Existing Schools</b>						
8252022	Dagnall School	I	Primary	15	0	27,526
8252027	Denham Village Infant School	I	Primary	15	0	28,120
8252000	The Disraeli School	C	Primary	30	0	61,606
8252025	East Claydon School	I	Primary	15	0	27,062
8253039	Great Kimble C of E School	P(A)	Primary	15	0	25,656
8252276	Haddenham Junior School	J	Primary	30	0	53,021
8253073	Haddenham St Marys C of E School	I	Primary	15	0	25,434
8252242	Hughenden Primary School	C	Primary	15	0	28,596
8252007	Mary Towerton School	I	Primary	15	0	27,914
8252006	Millbrook Combined School	C	Primary	30	0	58,344
8252001	Oak Green School	C	Primary	30	0	57,184
8253376	St Louis Catholic Primary School	C	Primary	30	0	55,516
8252288	William Harding Combined School	C	Primary	30	0	55,463
8254095	AMERSHAM SCHOOL	S(A)	Secondary	0	30	75,576
8254004	The Buckingham School	U	Secondary	0	30	75,802
8254000	Chiltern Hills Academy	S(A)	Secondary	0	30	77,720
8255409	Great Marlow School	S(A)	Secondary	0	30	75,283
8254001	THE HIGHCREST ACADEMY	S(A)	Secondary	0	30	80,464
8254070	Holmer Green Senior School	S(A)	Secondary	0	60	154,064
8254067	Mandeville School	U	Secondary	0	30	78,058
8254084	Sir William Ramsay School	S(A)	Secondary	0	30	77,677
8254701	Saint Michael's Catholic School	U	Secondary	0	180	463,094
8256905	The Aylesbury Vale Academy	S(A)	Secondary	30	60	220,733
	Abbey View Academy - Start-up		Primary			69,000
	Green Ridge Academy - Potential Diseconomy less Adj		Primary			-51,000
	St Michaels (Aylesbury) - Diseconomies		Secondary			612,000
	East Claydon School		Primary			26,279
	Additional Year 5 Class - Aylesbury		Primary			25,041
	Eddlesborough - Historical Agreement - Est.		Primary			39,212
<b>Grand Total</b>				<b>315</b>	<b>510</b>	<b>2,630,445</b>

Does not Include New and Growing Schools

Budget 2,391,935  
Projected Overspend -238,510

2020/2021				Estimated		
DfES No.	School Name	Type	Sector	Additional Reception Pupils	Additional Yr7 Pupils	Total Additional Funding NFF
<b>Expansion of Existing Schools Through the Schools Funding Formula</b>						
8252022	Dagnall School	I	Primary	15	0	31,413
8252027	Denham Village Infant School	I	Primary	15	0	31,258
8252000	The Disraeli School	C	Primary	30	0	68,329
8252025	East Claydon School	I	Primary	15	0	25,611
8253039	Great Kimble C of E School	P(A)	Primary	15	0	28,588
8252276	Haddenham Junior School	J	Primary	30	0	65,625
8252242	Hughenden Primary School	C	Primary	15	0	30,890
8252007	Mary Towerton School	I	Primary	15	0	33,135
8252006	Millbrook Combined School	C	Primary	30	0	67,044
8252001	Oak Green School	C	Primary	30	0	67,563
8253376	St Louis Catholic Primary School	C	Primary	30	0	60,608
8252288	William Harding Combined School	C	Primary	30	0	65,625
8254095	AMERSHAM SCHOOL	S(A)	Secondary	0	30	83,801
8254004	The Buckingham School	U	Secondary	0	30	83,813
8254000	Chiltern Hills Academy	S(A)	Secondary	0	30	89,044
8254001	THE HIGHCREST ACADEMY	S(A)	Secondary	0	30	91,690
8254070	Holmer Green Senior School	S(A)	Secondary	0	60	168,836
8254067	Mandeville School	U	Secondary	0	30	88,029
8254701	Saint Michael's Catholic School	U	Secondary	0	180	504,767
8256905	The Aylesbury Vale Academy	S(A)	Secondary	0	60	183,984
<b>Expansion of Existing Schools Through the Schools Funding Formula - Sub-Total</b>				<b>270</b>	<b>450</b>	<b>1,869,652</b>
<b>New &amp; Growing Schools Through the Schools Funding Formula</b>						
8252042	Abbey View Academy	C	Primary	17.5	0	63,349
8252039	Green Ridge Academy	C	Primary	35	0	134,660
<b>New &amp; Growing Schools Through the Schools Funding Formula - Sub-Total</b>				<b>52.5</b>	<b>0</b>	<b>198,009</b>
<b>Projects/Contingencies Outside the Schools Funding Formula</b>						
	Primary (Expected Increase in Demand)		Primary	110	0	234,539
	Secondary (Expected Increase in Demand)		Secondary	0	30	86,264
	Abbey View Academy - Diseconomies - Estimated		Primary	0	0	66,000
	Green Ridge Academy - Diseconomies - Estimated		Primary	0	0	15,000
	St Michaels (Aylesbury) - Diseconomies - Estimated		Secondary	0	0	500,000
	Eddlesborough - Historical Agreement - Estimated		Primary	0	0	45,000
	Reserve for DfE Clawback for Bourne End Academy					286,370
	Growth Fund Contingency					422,660
<b>Projects/Contingencies Outside the Schools Funding Formula - Sub-Total</b>				<b>110</b>	<b>30</b>	<b>1,655,834</b>
<b>Grand Total</b>				<b>432.5</b>	<b>480</b>	<b>3,723,495</b>



## HIGH NEEDS BLOCK DRAFT BUDGET 2020/21

Based on Period 8 2019/20 forecast outturn before academies recoupment

Updated 12/12/2019

### DSG

### Before Academies Recoupment

Group	Description	Budget	Forecast	DRAFT	Change from	Activity	Notes
		2019/20	outturn at P8	Budget	2019/20		
		2019/20	2019/20	2020/21	Budget		
		£	£	£	£	FTEs	
Special Schools Funding	Special Schools Place Funding	14,344,180	14,344,180	14,619,180	275,000	1,468	Full year effect of 42 places at Bierton Hill plus additional demand and inflation
	Special Schools Top Up	19,232,520	19,308,520	20,515,321	1,282,801	1,441	Full year effect of 42 places at Bierton Hill plus additional demand and inflation
<b>Special Schools Funding total</b>		<b>33,576,700</b>	<b>33,652,700</b>	<b>35,134,501</b>	<b>1,557,801</b>		
<b>Additional places and Exceptional Support</b>	Additional Places & Exceptional Support	<b>513,000</b>	<b>992,818</b>	<b>513,000</b>	<b>0</b>		
Independent Schools	Independent Schools	14,219,724	14,780,236	14,780,236	560,512	257	Assume can remain stable with 2019-20 spend following review of phase transfers?
	Independent Hospital Schools	70,000	116,000	70,000	0		
<b>Independent Schools total</b>		<b>14,289,724</b>	<b>14,896,236</b>	<b>14,850,236</b>	<b>560,512</b>		
Post 16 Colleges	Post-16 HN FE Colleges	6,318,000	6,818,000	7,318,000	1,000,000		
	Independent Colleges	1,000,000	1,000,000	1,000,000	0		
<b>Post 16 Colleges total</b>		<b>7,318,000</b>	<b>7,818,000</b>	<b>8,318,000</b>	<b>1,000,000</b>		
Support above £6k for pupils with plans	Inadequate notional SEN	220,000	177,371	220,000	0		
	EHCP top-up school age	6,871,000	8,116,063	8,807,105	1,936,105	1,593	Assume additional demand 2020-21 similar to 19-20
	Post 16 Element 2 (6th Form places)	722,000	722,000	864,000	142,000	144	Increase from 73 students to 131 in 2019/20 HN Places Return unchanged for 2020/21
<b>Support above £6k for pupils with plans</b>	EHCP Top Up - School Age	<b>7,813,000</b>	<b>9,015,434</b>	<b>9,891,105</b>	<b>2,078,105</b>		
Pupil Referral Unit funding	PRU Delegated Budget	2,279,496	2,279,496	2,370,676	91,180		Assumed inflation at 4% in line with NFF increase for mainstream
	Alt Prov Commissioning	1,965,000	1,965,000	2,043,600	78,600		Assumed inflation at 4% in line with NFF increase for mainstream
<b>Pupil Referral Unit funding total</b>		<b>4,244,496</b>	<b>4,244,496</b>	<b>4,414,276</b>	<b>169,780</b>		
Hospital and home tuition funding	Hospital Teaching Service	237,000	237,000	237,000	0		
	Buckinghamshire Home Tuition Service	217,600	217,600	217,600	0		
<b>Hospital and home tuition funding total</b>		<b>454,600</b>	<b>454,600</b>	<b>454,600</b>	<b>0</b>		
Alternative Resource Provision in mainstream	Additional Resourced Provision (ARP)	2,171,600	2,171,600	2,171,600	0	208	
	Add Resource Prov (ARP) Place Fundin	1,778,000	1,778,000	1,778,000	0	255	
<b>Alternative Resource Provision in mainstream total</b>		<b>3,949,600</b>	<b>3,949,600</b>	<b>3,949,600</b>	<b>0</b>		
<b>Therapies (SALT and OT)</b>	Integrated Therapies Contract	<b>1,657,000</b>	<b>1,657,000</b>	<b>1,657,000</b>	<b>0</b>		
<b>Contribution to early Help services in B</b>	Vulnerable Children Attainment Intervntr	<b>871,000</b>	<b>871,000</b>	<b>871,000</b>	<b>0</b>		
<b>Specialist teaching service</b>	BLT SEN Support Services	<b>2,057,000</b>	<b>2,057,000</b>	<b>2,057,000</b>	<b>0</b>		
<b>Education Psychology contribution</b>	DSG Contribution Education Psychology	<b>680,000</b>	<b>680,000</b>	<b>680,000</b>	<b>0</b>		
Recoupment to and from BCC for HN	Recoupment from BCC - All OLEA Schc	3,692,000	3,692,000	3,692,000	0		
	Recoupment to BCC - Special Schools	-1,035,000	-1,014,275	-1,035,000	0		
	Recoupment to BCC - Mainstream Schc	-280,000	-322,391	-280,000	0		
<b>Recoupment to and from BCC for HN total</b>		<b>2,377,000</b>	<b>2,355,334</b>	<b>2,377,000</b>	<b>0</b>		
<b>Re-integration</b>	Re-Integration Group	<b>412,500</b>	<b>508,360</b>	<b>412,500</b>	<b>0</b>		

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Agenda Item 6 Appendix 5

## HIGH NEEDS BLOCK DRAFT BUDGET 2020/21

Based on Period 8 2019/20 forecast outturn before academies recoupment

Updated 12/12/2019

### DSG

### Before Academies Recoupment

Group	Description	Budget	Forecast outturn at P8	DRAFT Budget	Change from 2019/20 Budget	Activity	Notes
		2019/20	2019/20	2020/21			
		£	£	£	£	FTEs	
Top up funding for pupils without EHCPs	Top up funding school age without EHC	910,000	910,000	910,000	0		
	Education Personal Budgets	166,000	175,000	166,000	0		
<b>Top up funding for pupils without EHCPs total</b>		<b>1,076,000</b>	<b>1,085,000</b>	<b>1,076,000</b>	<b>0</b>		
<b>Top up Funding Early Years</b>	Top up funding EY Non Statemented	<b>167,641</b>	<b>167,641</b>	<b>167,641</b>	<b>0</b>		
<b>Portage</b>	Early Stimulation Project - Portage	<b>200,000</b>	<b>211,892</b>	<b>200,000</b>	<b>0</b>		
<b>Educational Equipment</b>	Equipment	<b>250,000</b>	<b>250,000</b>	<b>250,000</b>	<b>0</b>		
<b>Educating Children in Public Care (ECPC) total</b>		<b>705,820</b>	<b>683,986</b>	<b>705,820</b>	<b>0</b>		
<b>Early Years EHC Plans</b>	Pre School Statemented Children	<b>303,168</b>	<b>303,168</b>	<b>303,168</b>	<b>0</b>		
<b>Alternative Provision total</b>		<b>496,000</b>	<b>474,651</b>	<b>496,000</b>	<b>0</b>		
<b>High Needs Block overheads</b>	High Needs Block overheads	<b>1,968,000</b>	<b>1,968,000</b>	<b>1,968,000</b>	<b>0</b>		
Estimated Import/Export Adjustment				120,000	120,000		
<b>High Needs Block Total</b>		<b>85,380,249</b>	<b>88,296,916</b>	<b>90,866,447</b>	<b>5,486,198</b>	<b>0</b>	

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## Appendix 6

Central Schools Service Block Budgets	For information Budget 2019/20	2020-21	2021-22	2022-23	2023-24	2024-25
<b>On- going central functions</b>						
Ex Education Services Grant	£1,178,000	£1,178,000	£1,178,000	£1,178,000	£1,178,000	£1,178,000
DfE Licences (DSG) increase by 2.5 % each year	£427,651	£438,266	£449,223	£460,453	£471,964	£483,764
<b>Admissions</b>						
Parental Information	£4,547	£4,547	£4,547	£4,547	£4,547	£4,547
Transfer Appeals	£27,465	£27,465	£27,465	£27,465	£27,465	£27,465
Admissions Team increase by 2.5% each year	£815,620	£836,011	£856,911	£878,334	£900,292	£922,799
<b>Admissions Appeals /Legal Service Cost</b>	£138,286	£0	£0	£0	£0	£0
BASL and TSAN	£35,000	£35,000	£35,000	£35,000	£35,000	£35,000
Schools Forum	£9,000	£9,000	£9,000	£9,000	£9,000	£9,000
Safeguarding in Ed. Project Team/Advisory service	£210,000	£210,000	£210,000	£210,000	£210,000	£210,000
Central overheads	£264,000	£264,000	£264,000	£264,000	£264,000	£264,000
Contribution from Historic commitments	(£338,207)	(£271,201)	(£184,606)	0	0	0
<b>Savings to be found</b>	<b>0</b>	<b>0</b>	<b>(£186,730)</b>	<b>(£470,560)</b>	<b>(£568,935)</b>	<b>(£666,525)</b>
<b>Total budgets On- going central functions as above</b>	<b>£2,771,363</b>	<b>£2,731,087</b>	<b>£2,662,810</b>	<b>£2,596,239</b>	<b>£2,531,333</b>	<b>£2,468,050</b>
<b>met from projected allocations On- going central functions</b>	<b>-£2,771,363</b>	<b>-£2,731,087</b>	<b>-£2,662,810</b>	<b>-£2,596,239</b>	<b>-£2,531,333</b>	<b>-£2,468,050</b>
<b>Historic Commitments</b>						
Contribution to Combined budgets (ex BLT)	£1,972,794	£1,972,794	£1,972,794	£1,972,748	£1,972,748	£1,972,748
Contribution to on-going central services	£338,207	£271,201	£184,606	£0	£0	£0
Rev Contrib to Capital (CERA) transfer to High Needs	£1,708,000	£0	£0	£0	£0	£0
Rev Contrib to Capital (CERA) transfer to DSG reserves	£0	£844,205	0	0	0	0
DSG Practical Learning Opportunities	£224,000	£224,000	£224,000	£224,000	£224,000	£224,000
Raising Participation Age	£139,000	£139,000	£139,000	£139,000	£139,000	£139,000
Schools Premature Retirement Costs (PRC)						
PRC - Primary	£121,000	£121,000	£121,000	£121,000	£121,000	£121,000
PRC - Secondary	£138,000	£138,000	£138,000	£138,000	£138,000	£138,000
DSG Funded PRC - Special	£13,000	£13,000	£13,000	£13,000	£13,000	£13,000
<b>Savings to be found</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>(£746,148)</b>	<b>(£1,676,948)</b>	<b>(£2,607,748)</b>
<b>Total budgets Historic Commitments as above</b>	<b>£4,654,000</b>	<b>£3,723,200</b>	<b>£2,792,400</b>	<b>£1,861,600</b>	<b>£930,800</b>	<b>£0</b>
<b>met from projected allocation Historic Commitments</b>	<b>(£4,654,000)</b>	<b>(£3,723,200)</b>	<b>(£2,792,400)</b>	<b>(£1,861,600)</b>	<b>(£930,800)</b>	<b>0</b>
<b>CSSB Total savings to be Found:</b>	<b>0</b>	<b>0</b>	<b>(£186,730)</b>	<b>(£1,216,708)</b>	<b>(£2,245,883)</b>	<b>(£3,274,273)</b>





## Buckinghamshire County Council Schools Forum

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### Report to the Schools Forum

**Title:** Schools Budget Proposals 2020-21 – Decision Paper

**Committee date:** 21<sup>st</sup> January 2020

**Author:** Liz Williams, Head of Finance Children's Service

**Contact officer:** Liz Williams, Head of Finance, Children's Services,  
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#### 1. Purpose of Report

- 1.1. The purpose of this paper is to summarise the decisions that are required in order to finalise the recommended Schools Budget and to identify the interdependencies between the decisions for the different funding blocks.
- 1.2. The attached appendix summarises the decisions required from the following papers on this agenda
  - a) Schools Budget Proposals
  - b) Growth Fund
  - c) Admissions Appeals Funding
- 1.3. The recommendations are included in the relevant sections of the reports however because of the interdependencies they are summarised here for final consideration.

#### 2. Recommendations

- 2.1. To agree the proposals summarised in the attached table.



Schools Forum - January 2020  
School budget Proposals 2020-21 - Decision Sheet

DSG Block	Decision Required	Inter-dependencies with other decisions	Proposal
<b>Overall Schools Budget Proposal</b>	To recommend the overall Schools Budget across the 4 blocks	Decisions for the 4 blocks to be made within this overall envelope	Schools Budget to be set at the level of the DSG settlement for 2020-21: £472.252m
<b>Schools Block</b>	To finalise the funding formula for maintained schools and academies in Buckinghamshire		To confirm and recommend the funding model agreed at the meeting in December 2019, updated for October 2019 census. Model includes: - Mirror NFF factors and rates - MFG set at +0.5% - Provision for Business Rates at estimated costs
	Growth Fund - reflects proposed methodology in separate Growth Fund report	Decision required on the revised criteria and methodology for the Growth Fund	To agree the new Growth Fund Methodology
<b>High Needs Block</b>	Savings Proposals to meet shortfall in High Needs Block	Interdependency with decisions on Central Schools Services Block (historic commitment funding has previously been allocated to support High Needs)	Schools Forum to agree initial proposals to balance High Needs budget in 2020-21 financial year
	Longer Term recovery Plan to address DSG deficit		Agree more detailed longer term recovery plan to be brought to March meeting of Schools Forum to reflect action plan and LA response to Impower work and impact of mitigating actions already in place
<b>Central Schools Services Block</b>	Budgets for ongoing commitments - Schools Forum is required to agree line by line	linked to separate report on Charging for Admissions appeals	To agree the proposed charges for Admissions Appeals from April 2020 To agree the budgets for ongoing commitments as detailed in Appendix 6 to the Schools Budget Proposals report.
	Central spend on historic commitments		To agree the budgets for historic commitments as detailed in Appendix 6 to the Schools Budget Proposals Report
		Links to proposals on high needs spend and to revenue budget monitoring report	To agree that the unallocated historic commitment for CERA (previously used to support High Needs) is left unallocated and returned to the DSG reserve
<b>Early Years Block</b>	Agree Early Years Funding Formula and proposed hourly rates		to agree the proposed funding formula rates subject to more detailed consideration by the Early Years Forum. To be brought back to Schools Forum in March.
	Agree level of pass through to settings		to agree that 95% of the 3&4 year old, and 2 year old funding is passed directly to settings, with 5% held centrally - as agreed in previous years





## Buckinghamshire County Council Schools Forum

### Report to the Schools Forum

<b>Title:</b>	<b>Admission Appeals - Charging All Schools</b>
<b>Committee date:</b>	21 <sup>st</sup> January 2020
<b>Author:</b>	Liz Williams, Head of Finance Children's Service
<b>Contact officer:</b>	Janaki Try, Finance Business Partner (Schools) <a href="mailto:jtry@buckscc.gov.uk">jtry@buckscc.gov.uk</a>

#### 1. Purpose of Agenda Item

1.1. This report sets out proposals for a new Admission Appeals charging scheme for all schools, in order to comply with Department of Education (DfE) guidance. The proposal is to charge all schools, including Community and Voluntary Controlled schools that currently receive the appeals service free of charge. Schools that are their own admission authority - academies, maintained Foundation and Voluntary Aided schools are currently charged for this service. BCC also proposes to adjust the charging rates to reflect the complexity of the work involved in specific types of appeal. The DfE have, through various communications, stressed the need for compliance with their guidance and because of this Buckinghamshire County Council are proposing to introduce the new charging scheme from 1<sup>st</sup> April 2020.

#### 2. Background

2.1. Under Section 94 of the School Standards and Framework Act 1998, responsibility for making arrangements for appeals against the refusal of a school place rests with the admission authority of the school. The admission authority and appeal panel must act in accordance with statutory codes and guidelines. Appeal panels perform a judicial function and must be transparent, accessible, independent and impartial, and operate according to principles of natural justice.

2.2. Buckinghamshire County Council as an admission authority is responsible for the appeals function for community and voluntary controlled schools, as shown in the table below:



Type of school	Who is the admission Authority?	Who is responsible for Arranging an admission appeal?
Academies	Academy Trust	Academy Trust
Community schools	Local Authority	Local Authority
Foundation schools	Governing body	Governing body
Voluntary aided schools	Governing body	Governing body
Voluntary controlled schools	Local Authority	Local Authority

2.3. The admission authorities of Foundation, Voluntary Aided schools and academies may ask another body, e.g. the local authority, to carry out some or all of their admissions functions on their behalf. The majority of schools in Buckinghamshire use this service. However, the admission authority remains responsible for ensuring those functions are carried out properly.

2.4. Recent guidance from the DfE sets out that all schools and academies should be treated on the same basis in relation to appeals. Schools revenue funding 2020 to 2021 Operational guide reiterates this:

*'Local authorities should not treat voluntary aided schools, foundation schools or academies, differently from maintained schools in the services they provide to them; this is set out in the DSG conditions of grant. Schools such as voluntary aided schools, foundation schools and academies cannot therefore be charged for services that are provided free of charge to community and voluntary controlled schools, and paid for out of the centrally held DSG..... For example, although admissions appeals are not a duty that the local authority holds in relation to all schools, we would still expect all schools to be treated fairly and equitably by the local authority'*

### 3. The Admissions Appeals Service

3.1. The administration of the admission appeals process is undertaken by the County Council's Education Appeals Team, within the Resources Business Unit. The team works according to the statutory Admission Appeals Code, and administers appeals, supports the independent appeal panel and provides impartial advice to parents and schools. Admission authorities must ensure that panel members are

independent and retain their independence for the duration of their service. Details of the service are available to the public on Buckinghamshire County Council's website.

- 3.2. Currently, the Education Appeals Team enters into individual (usually 2 year) contracts with academies, Foundation and Voluntary Aided schools under which they are charged a fee per appeal of £212 or £218 (depending on the contract renewal date). Recent analysis suggests that existing rates do not fully recover costs, as costs e.g. venue costs are increasing.
- 3.3. The appeals service for maintained Community and Voluntary Controlled schools is not currently charged to schools and is funded from the Central School Services Block (CSSB), from a £138k budget in 2019-20. Proposals to reduce this support, as a result of DfE's reduction in CSSB funding, was discussed in the School Budget Proposals report, earlier in this agenda.
- 3.4. There are significant difficulties when comparing the different service provision that local authorities offer schools for admission appeals and with the charges (varying from a subsidised service to full cost recovery). For example Hertfordshire County Council is in a similar position to Buckinghamshire and will be introducing a flat rate of £200 per appeal for all schools from April 2020. However it should be noted that Hertfordshire is not a fully selective authority and this is reflected in the simplicity of their charging structure.

#### **4. Options for Charging**

- 4.1. It is clear that arrangements need to be changed so Buckinghamshire Council has a consistent charging system for the admissions appeals service. The local authority has identified three options to consider when deciding the appropriate charging mechanism for Buckinghamshire to comply with DfE guidance:

##### **4.2. Option 1**

- The LA stops charging schools. All costs are then to be met from Central Schools Services Block (CSSB). The Admissions Appeals Team has estimated this cost to be £340k per year.
- Option 1 is unaffordable as the 2019-20 budget of £138k is to be reduced to nil in 2020-21 and in future years, in-line with budget proposals for the CSSB addressed earlier in the agenda.

#### 4.3. Option 2

- The LA charges all schools a flat rate for all appeals.
- Option 2 is not equitable as it does not reflect the complexity and the time taken for different types of appeals. Buckinghamshire has seen an increase in the number and complexity of appeals due to the popularity of grammar schools for both Buckinghamshire and out of county applicants. For example grammar school appeals may be an unqualified grammar school appeal with Selection Review Process, unqualified grammar school appeal without Selection Review Process, or a qualified grammar school appeal. In addition the Admission Appeals Service has identified the following less complex types of appeal: upper school appeals, primary school appeals and Infant Class Size appeals.

#### 4.4. Option 3

- To establish a charging system that reflects the complexity of the appeal sufficient to meet reasonable admission appeal costs. Appendix 1 shows the number of appeals for each different type in 2018-19.
- In February 2019 Counsel's opinion was sought and received by the Admissions Appeals Service on issues relating to increased costs and numbers of appeals, as follows: *'In order for the treatment of academies and maintained schools to be "equal", it is not sufficient merely to show that both are charged for appeals. On the other hand, it is not necessarily required to show that the charges are the same if there is a difference in the complexity of the appeal processes carried out by the Appeals Team for community schools and grammar schools.'* and *'On the assumption that both maintained schools and academies are charged a fee amount intended to be sufficient to meet the reasonable admission appeals costs and no more.'*

### 5. Proposals for Charging Schools

5.1. A consistent system would be achieved by charging all schools for the admissions appeals service. On this basis, the local authority proposes to adopt option 3 as set out in 4.4 above, because it is deemed to be the most appropriate option for Buckinghamshire, for the reasons outlined in this report.

5.2. The Council's Education Appeals Team has set out the following charges based on estimated costs. These charges are proposed to apply from April 2020 and will be charged for all appeals lodged. An annual review of the sufficiency of charges and

the impact on schools will be made. Schools are encouraged to contact the Education Admissions Team to discuss individual charges and the service offered.

**Charges to apply from April 2020**

£260	per unqualified grammar school appeal with SRP*		
£240	per unqualified grammar school without SRP* appeal		
£220	per qualified grammar school appeal		
£220	per upper school appeal		
£190	per primary appeal (not ICS)		
£150	per ICS appeal.		
	*SRP = selection review panel		

5.3. The impact on schools will vary as currently some schools are charged for the service but will now be charged a fee according to the nature of the appeal. Generally, Secondary schools will see an increase in their current charge. For maintained Community and Voluntary Controlled schools where BCC is the admission authority, charges will apply from April 2020. Trend data suggests the total number of appeals maybe one or two in a year. The forecast annual charge may vary from £300 to £380 for the primary sector, and £440 for the secondary sector. Appendix 2 gives a summary of appeals by school type.

**6. Recommendations**

6.1. Schools Forum is recommended to note the information in the report and in the appendices, and to agree the following recommendations:

- (i) From April 2020 to charge all schools based on option 3 as set out in 5.2
- (ii) To agree an annual review of the charging scheme, in particular the sufficiency of charges to cover costs and the impact on schools.



## Appendix 1

### Buckinghamshire County Council - Appeals information for 2018-19

(Details from Buckinghamshire County Council website)

<b>2018/19 appeals</b>	<b>Number heard</b>	<b>Number successful</b>	<b>Percent successful</b>
Primary school, Reception to Year 2	55	8	15
Primary school, years 3-6	50	17	34
Upper school, year 7	189	52	28
Qualified grammar school, year 7	214	17	8
Unqualified grammar school, year 7, after selection review	185	28	15
Unqualified grammar school, year 7, with no selection review	74	2	3
Upper school, years 8-10	18	9	50
Qualified grammar school, years 8-10	54	16	30
Unqualified grammar school, years 8-10	54	7	13
Total Yr. 7 grammar school appeals for Buckinghamshire applicants	200	35	18
Total Yr. 7 grammar school appeals for Out-of- county applicants	272	12	4

## Summary of Appeals by School Type - Lodged/Heard from 2016/17 to 2019/20

	Phase	Status	2016/17		2017/18		2018/19		2019/20		
			Lodged	Heard	Lodged	Heard	Lodged	Heard	Lodged	Heard	
<b>Total Appeals Lodged / Heard</b>	<b>Community &amp; Voluntary Controlled Schools</b>										
	Primary	Community school	271	164	233	122	157	79	88	36	
		Voluntary controlled school	27	18	24	14	19	11	7	4	
	<b>Primary Total</b>		<b>298</b>	<b>182</b>	<b>257</b>	<b>136</b>	<b>176</b>	<b>90</b>	<b>95</b>	<b>40</b>	
	Secondary & All-through	Community school	3	0	11	6	10	4	2	1	
		Voluntary controlled school	0	0	0	0	0	0	0	0	
	<b>Secondary/All-through Total</b>		<b>3</b>	<b>0</b>	<b>11</b>	<b>6</b>	<b>10</b>	<b>4</b>	<b>2</b>	<b>1</b>	
	<b>Voluntary Aided, Foundation &amp; Academy Schools</b>										
	Primary	Voluntary aided school	5	2	16	6	6	4	11	7	
		Foundation school	38	19	31	15	28	21	21	12	
		Academy	66	39	55	25	44	23	56	30	
	<b>Primary Total</b>		<b>109</b>	<b>60</b>	<b>102</b>	<b>46</b>	<b>78</b>	<b>48</b>	<b>88</b>	<b>49</b>	
	Secondary & All-through	Voluntary aided school	16	10	12	10	19	11	55	39	
		Foundation school	93	73	54	42	108	88	90	58	
Academy		694	550	682	549	934	719	924	736		
<b>Secondary/All-through Total</b>		<b>803</b>	<b>633</b>	<b>748</b>	<b>601</b>	<b>1061</b>	<b>818</b>	<b>1069</b>	<b>833</b>		
<b>Grand Total</b>		<b>1213</b>	<b>875</b>	<b>1118</b>	<b>789</b>	<b>1325</b>	<b>960</b>	<b>1254</b>	<b>923</b>		







## Buckinghamshire County Council Schools Forum

### Report to the Schools Forum

**Title:** Growth Funding Methodology for mainstream schools.

**Committee date:** 21<sup>st</sup> January 2020

**Author:** Liz Williams, Head of Finance Children's Services

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#### 1. Purpose of Agenda Item

- 1.1. As agreed at the Schools Forum meeting on the 3<sup>rd</sup> December 2019, this report sets out the proposal to move to a formulaic approach to Buckinghamshire County Council's (BCC) growth funding methodology for mainstream schools. All proposed changes in methodology are in line with the recently published DfE growth fund guidance for 2020/21, and will take effect from 1<sup>st</sup> April 2020. The methodology will be reviewed on an annual basis as part of the budget setting process to ensure it is still fit for purpose and is affordable.
- 1.2. The local authority's growth fund criteria and methodology will need to be approved by Schools Forum and then submitted to the DfE via the Authority Pro-Forma Tool (APT). The APT provides raw data on pupil characteristics provided by the DfE to enable the Local Authority to use the agreed funding formula to calculate individual schools budgets. The DfE will check that BCC's methodology provides a transparent and consistent basis for the allocation of funding. The deadline for submission to the DfE is 21<sup>st</sup> January 2020.

#### 2. Background

- 2.1. As part of the move to a formulaic approach, consideration has been given to methodologies adopted by other Local Authorities as well as the recently published DfE guidance which sets out examples of growth fund methodologies that are compliant with DfE criteria.

2.2. As an agreed principle, where a shortfall in DfE's growth funding is identified as part of the schools budget setting process, the estimated shortfall will be met by top slicing schools' funding prior to applying the formula factors. For 2020-21 the DfE's growth fund allocation of £3.14m and is sufficient to meet funding needs – this is detailed in the budget proposals report earlier in the agenda.

2.3. The DfE Schools Revenue Funding 2020 to 2021 – Operational Guide states growth fund can only be used to:

- Support growth in pre-16 pupil numbers to meet basic need
- Support additional classes needed to meet the infant class size
- Meet the revenue cost of new schools

The following sections outline the current BCC growth fund methodology and the proposals for change for each of these 3 criteria.

### **3. Support growth in pre-16 pupil numbers to meet basic need**

3.1. Funding for growth in existing schools applies where the Local Authority agrees to expand an existing school to support basic need in the County, this may be permanent or for a one off temporary (bulge) class. The funding is calculated for each school based on 3 funding formula factors and is paid to schools outside of the schools funding formula, as a growth fund project. If this is a permanent expansion, funding can be for a period of up to 7 years.

3.2. Currently, the Local Authority does not use the schools funding formula via the APT to fund increases in pupil numbers outside of the October census. The APT is thus based on the previous year's census data to drive the funding to each school. In any given financial year, the Local Authority has funded growth outside of the funding formula for the agreed number of additional pupils that would present as new pupils at the start of an academic year in September but who have not been captured on any census data. For maintained schools funding is for 7/12ths (September to March) covering the period of time in which the school is not funded by the funding formula. For Academies, whose funding year runs from September to August, the funding is for 12/12ths, but the DfE returns the additional 5/12ths back to the Local Authority to maintain 7/12ths funding consistency with maintained schools.

3.3. From April 2020, BCC are proposing to reflect the DfE Guidance which states where it has been agreed with a school to increase a school's PAN on a **permanent basis** this should be reflected in an adjustment to the pupil numbers via the APT. The expanding school will then receive its funding through all of the per pupil formula factors.

3.4. From April 2020, where it is a temporary increase in pupil numbers or it is unclear as to exactly where growth is needed, this is dealt with outside of the schools funding formula as a growth fund project. Funding will reflect all funding factors in line with permanent expansions, and will reflect the proportion of the year which is not funded through the formula.

3.5. The following table illustrates current funding factors and proposed growth funding per pupil for an average expanding school or temporary classes. (Based on actual expanding schools using 2020/21 funding rates):

Factors	(a) Current Primary	(b) Proposed Primary	(a) Current Secondary	(b) Proposed Secondary
AWPU	£1,714	£1,714	£2,411	£2,411
Deprivation - IDACI	£39	£39	£45	£45
Deprivation - FSM		£93		£141
Prior Attainment	£219	£219	£253	£253
EAL		£59		£17
Total	£1,972	£2,124	£2,709	£2,867
Increase on Current		£152		£158

Note: In certain circumstances some schools under the new proposal would be entitled to fringe, minimum per pupil funding, mobility and potentially MFG.

#### 4. Support additional classes needed to meet the infant class size

4.1. Currently, under BCC's Fair Access Protocol the maximum any school would be asked to admit is one child in 30 of the admission number (i.e. one child per class of intake per academic year, for example with an Admission of 180, the maximum BCC would ask a school to admit up to is 6 extra pupils). Should there be a need to increase over and above this protocol in a particular school this increase would fall under the category of a temporary expansion as discussed in section 3 above. BCC are proposing to maintain the current practice.

#### 5. Meet the revenue cost of new schools

5.1. Currently, where a new school is required to meet basic need as determined by the LA, all the funding for that new school is negotiated between a group of schools forum members and the new school's representatives. This process has provided useful information on costs to be considered when funding a new school on a formulaic methodology. The last agreed funding under Buckinghamshire's current methodology for new schools were £171k for a Primary school and £275k for a Secondary school.

5.2. From April 2020 BCC are proposing a new methodology to meet the revenue cost of a new school. There are three different areas of funding and a worked example is included in Appendix 1 showing the possible funding a school might receive prior to opening and in the initial years.

5.3. **Start-up funding:** this covers the costs of setting up the new school before it opens. BCC proposes to fund all start-up costs based on the DfE's Growth Factor Lump Sum, with Primary schools being funded based on the DfE's Lump Sum (£67k in 2020/21) and Secondary schools being funded at twice this amount to recognise the differential in costs. The funding is to support the following:

- New Headteacher salary (Approx. 2 Terms Prior to Opening)
- Recruitment
- Admin
- Any other Goods and Services Necessary

Assuming the new school will open in September, payment will be made to the new school 1/3 in the spring term and 2/3 in the summer term. The DfE will also provide a one-off Project Development Grant (PDG) payment of £25k to the successful proposer towards meeting the legal costs associated with establishing the new school.

5.4. **Variations to pupils** (in the funding formula). BCC are proposing to maintain the current practice. For a new school, pupil numbers are included in the APT at 30 pupils per class for each new year group. Typically when the Local Authority opens a new primary school it opens with a reception, year 1 and year 2 class. A secondary school opens with year 7 classes only. The school receives funding through the funding formula on this basis. This is up to a maximum of seven years until all year groups are open. In addition a new school will receive its lump sum funding in the first year outside of the formula as this cannot be processed through the APT until the school has opened and is recognised in the DfE's data.

5.5. **Diseconomies Funding:** Diseconomies funding is additional funding for new schools on top of variation to pupil numbers, to reflect the diseconomies of scale in the first few years of a new school until pupil funding gives it sufficient funding to achieve economies of scale. Currently this is part of the negotiation process. From April 2020, BCC proposes to move this to a per pupil arrangement as follows:

- **Primary – diseconomies funding**
  - In the first year the school opens all of the initial classes and are funded via the APT (reception, year 1 and year 2 classes).

- From the second year all year groups previously open are protected so as to receive funding for a minimum of 27 pupils per class. This protection is provided for a maximum of three years from the point of opening.
- **Secondary – diseconomies funding**
- Typically in the initial years, a school would open with fewer classes per year group than expected once fully established. In the first year the school opens but is funded for all expected classes in the open year groups (usually this is only for year 7 classes).
- In subsequent years all expected classes are guaranteed funding of all open year groups at 27 pupils per class. This protection is provided for a maximum of three years from the point of opening.

## 6. Recommendations

- 6.1. Schools Forum members are asked to note the information set out in the paper and in the appendix.
- 6.2. To agree from April 2020, where it has been agreed with a school to increase a school's PAN on a permanent basis, this should be reflected in an adjustment to the pupil numbers via the APT, with funding through all of the per pupil formula factors, as in 3.3. above.
- 6.3. To agree from April 2020, where it is a temporary increase in pupil numbers or it is unclear as to exactly where growth is needed, this is dealt with outside of the schools funding formula as a growth fund project. Funding will reflect all funding factors in line with permanent expansions, as in 3.4 above.
- 6.4. To agree to maintain the current practice with regard to supporting additional classes needed to meet the infant class size as in 4.1 above.
- 6.5. To agree from April 2020, Start-up funding for new schools will be at DfE's Growth Factor Lump Sum rate for Primary schools and twice the DfE's Growth Factor Lump Sum rate for Secondary schools, as in 5.3 above.
- 6.6. To agree to maintain the current practice for variations to pupils for new schools, with pupil numbers included in the APT at 30 pupils per class for each 'new' year group, as in 5.4 above.
- 6.7. To agree from April 2020, Diseconomies Funding for new schools will be based on a per pupil arrangement, with guaranteed funding of all open year groups at 27 pupils per class, as in 5.5 above.
- 6.8. To agree that the growth fund methodology be reviewed on an annual basis as part of the budget setting process.

## Appendix 1

### Illustration of Funding Provided to a New Primary School:

Bucks New Primary opens in September 2020, it is due to be a one form entry combined school and initially opens with a Reception, Year 1, and Year 2 class. The table below sets out the funding over the first 3 years:

Class/Year of Opening	Start-up Funding*	1 <sup>st</sup> Year Sept. 2020	2 <sup>nd</sup> Year (Oct. 2020 Census)	3 <sup>rd</sup> Year (Oct. 2021 Census)
Reception		30	30	30
Year 1		30	28	30
Year 2		30	21	29
Year 3			19	24
Year 4				22
<b>New Places Funded in formula</b>		<b>90</b>	<b>30</b>	<b>30</b>
Funded Pupil No.s (APT)		90	98	135
Diseconomies – Shortfall in Expected Pupils (Total Guaranteed 27 Places x No. of classes – Funded Pupil No.s)			13	3
Estimated Funding	£67,000	# £259,803	£111,595	£75,183

\*Additional £25,000 academy conversion grant from the ESFA to cover pre-opening costs.

# 1<sup>st</sup> Year includes Part Year Lump Sum

### Illustration of Funding Provided to a New Secondary School:

Bucks New Secondary opens in September 2020, it is due to be a 6 Form Entry secondary school and initially opens with just 4 Year 7 classes. The table below sets out the funding over the first 3 years:

Class/Year of Opening	Start-up Funding*	1 <sup>st</sup> Year Sept 2020	2 <sup>nd</sup> Year (Oct. 2020 Census)	3 <sup>rd</sup> Year (Oct. 2021 Census)
Year 7		120+60	150+30	180
Year 8			118	146
Year 9				120
Year 10				
Year 11				
<b>New Places Funded in formula</b>		<b>120+60</b>	<b>150+30</b>	<b>180</b>
Funded Pupil No.s (APT)		180	298	446
Diseconomies – Shortfall in Expected Pupils (Total Guaranteed 27 Places x No. of classes – Funded Pupil No.s)			44	58
Estimated Funding	£134,000	# £584,704	£732,314	£801,122

\*Additional £25,000 academy conversion grant from the ESFA to cover pre-opening costs.

# 1<sup>st</sup> Year includes Part Year Lump Sum

## Schools Forum – Forward Plan 2019-20

### Key meetings and decisions – updated September 2019 (new items highlighted yellow)

Meeting Date	Agenda Item	Purpose of Report
21 January 2020	<ol style="list-style-type: none"> <li>1. Schools Budget Proposals 2020-21</li> <li>2. SFFG Update (Standing Item)</li> <li>3. Appeals Funding</li> <li>4. SEN Update- Budgetary proposals only.</li> <li>5. Budget Monitoring</li> <li>6. Growth Fund</li> <li>7. Unitary Update (Standing Item- Until end of March 2020)</li> </ol>	To agree the final DSG budgets for 2020-21
24 March 2020	<ol style="list-style-type: none"> <li>1. Schools Forum Funding Group Update (standing item)</li> <li>2. SEN Update (Standing Item)</li> <li>3. Unitary Update (Standing Item- Until end of March 2020)</li> </ol>	
30 June 2020	<ol style="list-style-type: none"> <li>1. Schools Forum Funding Group Update (standing item)</li> <li>2. SEN Update (Standing Item)</li> </ol>	
13 October 2020	<ol style="list-style-type: none"> <li>1. Schools Forum Funding Group Update (standing item)</li> <li>2. SEN Update (Standing Item)</li> </ol>	
8 December 2020	<ol style="list-style-type: none"> <li>1. Schools Forum Funding Group Update (standing item)</li> <li>2. SEN Update (Standing Item)</li> </ol>	

## Completed Meetings

<p>15 October 2019</p>	<ol style="list-style-type: none"> <li>1. Election of Chairman and Vice Chairman</li> <li>2. Agree membership and Chairman of all sub-committees</li> <li>3. Schools Forum Funding Group update (standing item)</li> <li>4. Schools Forum Induction</li> <li>5. Budget Monitoring</li> <li>6. SEN Quarterly Update (standing item)</li> <li>7. Update on National Funding Formula and DSG Guidance 2020-21</li> <li>8. De-delegation 2020-21 – Consultation with schools</li> <li>9. Verbal Unitary Update- G Drawmer</li> </ol>	<p>To review projected spend in 2019-20 and future years and identify savings proposals to reduce spend where appropriate</p> <p>To update on any changes to DSG Operational Guidance on the NFF, and agree any consultation that may be required with schools</p> <p>To agree consultation process on De-delegation of budgets (in line with operational guidance)</p> <p>To consult Schools Forum on proposals for the pay review for support staff in schools prior to consideration by SABPAC</p>
<p>03 December 2019</p>	<ol style="list-style-type: none"> <li>1. Schools Forum Funding Group Update (standing item)</li> <li>2. Schools Budgets 2020-21             <ol style="list-style-type: none"> <li>a. Schools Block</li> <li>b. Central Schools Services Block</li> <li>c. High Needs Block</li> <li>d. Early Years</li> </ol> </li> <li>3. De-delegation 2020-21</li> <li>4. Review of demand and costs within the High Needs Block (including agreement of any consultation on transfer between funding blocks)</li> <li>5. SEN Quarterly Update</li> <li>6. Growth Fund</li> </ol>	<p>Set of papers to outline schools budget proposals, including outcome from any consultation with schools and impact of changes</p> <p>Outcome of consultation and recommendation for 2020-21</p>



7. Schools Pay Review (Part 2 item)

Gary Lamb – confidential item

