



Schools Forum agenda

Date: Tuesday 6 December 2022

Time: 1.30 pm

Venue: The Oculus, Buckinghamshire Council, Gatehouse Road, Aylesbury HP19 8FF

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Agenda Item	Time	Page No
1 Election of Chairman	13.30	
2 Apologies for Absence		
3 Declarations of Interest To disclose any Personal or Disclosable Pecuniary Interests.		
4 Minutes of the Previous Meeting	13.40	5 - 6
5 Induction for New Members To be presented by Ms E Williams, Head of Finance (Children's Services)- Buckinghamshire Council.	13.45	7 - 24

6	Constitution and Membership To be presented by Mr J Carter, Schools Management Accountant- Buckinghamshire Council.	14.00	25 - 40
7	Update from the SFFG A verbal update to be provided by Ms J Cochrane, Chairman of the Schools Forum Funding Group.	14.10	
8	Revenue Budget Monitoring 2022-23 To be presented by Ms E Williams, Head of Finance (Children's Services)- Buckinghamshire Council.	14.15	41 - 44
9	National Funding Formula and Operational Guidance 2023-24 To be presented by Ms E Williams, Head of Finance (Children's Services) and Mr J Carter, Schools Management Accountant-Buckinghamshire Council.	14.30	45 - 62
10	De-delegation 2023-24 To be presented by the Chairman of Maintained Schools Committee.	14.45	63 - 70
11	School Improvement - Proposals for De-delegation 2023-24 To be presented by Mr G Drawmer, Head of Achievement and Learning- Buckinghamshire Council.	15.00	71 - 80
12	Report from the DSG Spending Review Group To be presented by Ms E Williams- Head of Finance (CYP) and Mr S James- Director for Education, Buckinghamshire Council	15.15	81 - 82
13	Special Schools Minimum Funding Guarantee To be presented by Ms E Williams, Head of Finance (Children's Services)- Buckinghamshire Council.	15.30	83 - 86
14	Schools Specific Contingency Panel Terms of Reference To be presented by Ms E Williams, Head of Finance (Children's Services)- Buckinghamshire Council.	15.45	87 - 94

15 Exclusion of the Public

To resolve that under Section 100(A)(4) of the Local Government Act 1972 the public be excluded from the meeting for the following item(s) of business on the grounds that it involves the likely disclosure of exempt information as defined in Part I of Schedule 12A of the Act.

Paragraph 3

Information relating to the financial or business affairs of any particular person (including the authority holding that information)

16	Support Staff Pay Review	16.00	95 - 96
	To be presented by Ms J Whitely- Head of HR Consultancy, Policy and Reward and Ms J Pead- Policy & Reward Consultant, Buckinghamshire Council.		
17	AOB	16.15	
18	Date of Next Meeting	16.25	
	Tuesday 17 January 2023- 1.30pm The Oculus, The Gateway, Aylesbury.		

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 democracy@buckinghamshire.gov.uk.

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Schools Forum minutes

Minutes of the meeting of the Schools Forum held on Tuesday 11 October 2022 in MS Teams Virtual Meeting, commencing at 1.30 pm and concluding at 2.10 pm.

Members present

Ms J Antrobus, Ms J Cochrane, Ms J Freeman, Mr A Gillespie, Mrs J Male, Mrs E Stewart, Ms K Tamlyn, Mr B Taylor, Ms J Watson, Ms S Barcock-Wood, Ms S Bayliss, Ms C Beevers, Mrs G Bull, Mr J Carter, Ms R Chapman, Mr G Drawmer, Mr E Hillyard, Mr M Holdsworth, Mr S James, Ms N Lovegrove, Mr R Peters, Ms J Robertson, Mr K Shabbir and Ms F Smalley

Agenda Item

1 Election of Chairman & Vice- Chairman

Ms K Tamlyn opened the meeting and welcomed all to the meeting. Mr G Drawmer asked for nominations for the election of Chairman. Mrs K Tamlyn was nominated. The forum was asked to vote on the nominee.

RESOLVED: The forum APPOINTED Mrs K Tamlyn as the Chairman.

Mrs K Tamlyn as the new Chairman asked for nominations for the Vice- Chairman. Ms J Cochrane was nominated and the forum took a vote.

RESOLVED: The forum APPOINTED Ms J Cochrane as the Vice- Chairman

2 Apologies & Memberships of Sub- Committees

Apologies were received from:

Ms E Williams- Head of Finance (CYP)- Buckinghamshire Council
Ms J Divers – Turnfurlong Junior School
Ms D Rutley- Aspire

Election of sub-groups- The chairmen of the subgroups were agreed as follows:

Contingency Group: Meet once yearly- Feb/March- 4 members required

Vacancy- (Chairman)

Ms J Freeman

Mrs E Stewart

Mr K Shabbir

SFFG- meet prior to each School Forum (SF) meeting:

Jeanette Cochrane- Chairman

Vacancy- Vice Chairman

Ms K Tamlyn

Ms G Bull

Ms J Antrobus

Ms E Stewart

Mr K Shabbir

Maintained Schools Sub-committee (De-Delegation)- Annual meeting.

Janice Freeman (Chairman).

Remainder of membership remained as previously- Maintained Schools Reps

A meeting date was agreed- Wednesday 16 November 2022- 1pm- MS Teams Meeting.

It was agreed any reports from trade unions would need to be submitted by 09 November 2022.

The DSG Spending Review Group-

Simon James- (Chairman)

Ms J Cochrane

Vacancy

Vacancy

Vacancy

3 Declarations of Interest

There were no declarations of interest.

4 Minutes of the Previous Meeting

The minutes of the meeting held on 28 June 2022 were **AGREED** as an accurate record

The actions from the meeting held on 28 June 2022 were reviewed and **AGREED** as completed.

5 AOB

There were no items of AOB.

6 Date of Next Meeting

Tuesday 06 December 2022- 1.30pm.

The Oculus, Buckinghamshire Council, Gatehouse Road, Aylesbury HP19 8FF



Report to Schools Forum

Date: 6th December 2022

Title: Induction for New Members

Author: Liz Williams, Head of Finance – Children’s Services

Recommendations:

Schools Forum is asked to note the report.

1. Purpose of the Report

- 1.1. The purpose of this agenda item is to provide information on the roles and responsibilities of Schools Forum. The paper is particularly aimed as an induction document to support new members of the Forum but is intended to be a useful reference for all members.

2. Main Considerations

- 2.1. The composition, constitution and procedures of schools forums are governed by national regulations, The Schools Forum (England) Regulations 2012 (as amended).
- 2.2. Schools forums generally have a consultative role. However, there are situations in which they have decision making powers. The respective roles of schools forums, local authorities and the DfE are summarised in the table “Schools Forum Powers and Responsibilities” which is attached as Appendix 1 to this report.
- 2.3. Local Authorities have an ongoing responsibility to provide Schools Forums with appropriate support, information and guidance in carrying out their functions and responsibilities.
- 2.4. The DfE provides guidance to Schools Forums, the most recent guidance: [DfE external document template \(publishing.service.gov.uk\)](https://www.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/100444/schools_forum_guidance_2021.pdf) was updated in March 2021. This document outlines the requirements for the membership and constitution of the Schools Forum as well as providing guidance on how an effective Schools Forum should operate.

2.5. Appendix 2 to this report is a brief induction presentation giving an overview of the legislative framework, the constitution of the Buckinghamshire Schools Forum, the cycle of meetings and the forward plan, and a summary of the DfE guidance on effective Schools Forums.



Schools forum powers and responsibilities

A summary of the powers and responsibilities of schools forums.

Function	Local authority	Schools forum	DfE role
Formula change (including redistributions)	Proposes and decides	Must be consulted [voting restrictions apply - see schools forum structure document] and informs the governing bodies of all consultations	Checks for compliance with regulations
Movement of up to 0.5% from the schools block to other blocks	Proposes	Decides	Adjudicates where schools forum does not agree LA proposal
Contracts (where the LA is entering a contract to be funded from the schools budget)	Proposes at least one month prior to invitation to tender, the terms of any proposed contract	Gives a view and informs the governing bodies of all consultations	None

Function	Local authority	Schools forum	DfE role
Financial issues relating to: <ul style="list-style-type: none"> • arrangements for pupils with special educational needs, in particular the places to be commissioned by the LA and schools and the arrangements for paying top-up funding • arrangements for use of pupil referral units and the education of children otherwise than at school, in particular the places to be commissioned by the LA and schools and the arrangements for paying top-up funding • arrangements for early years provision • administration arrangements for the allocation of central government grants 	Consults annually	Gives a view and informs the governing bodies of all consultations	None
Minimum funding guarantee (MFG)	Proposes any exclusions from MFG for application to DfE	Gives a view	Approval to application for exclusions

Function	Local authority	Schools forum	DfE role
De-delegation for mainstream maintained schools for: <ul style="list-style-type: none"> contingencies administration of free school meals insurance licences/subscriptions staff costs – supply cover support for minority ethnic pupils/underachieving groups behaviour support services library and museum services School improvement 	Proposes	Maintained primary and secondary school member representatives will decide for their phase. Middle schools are treated according to their deemed status	Will adjudicate where schools forum does not agree LA proposal
General Duties for maintained schools <ul style="list-style-type: none"> Contribution to responsibilities that local authorities hold for maintained schools (please see operational guide for more information) 	Proposes	Would be decided by the relevant maintained school members (primary, secondary, special and PRU).	Adjudicates where schools forum does not agree LA proposal
Central spend on and the criteria for allocating funding from: <ul style="list-style-type: none"> funding for significant pre-16 pupil growth, including new schools set up to meet basic need, whether maintained or academy 	Proposes	Decides	Adjudicates where schools forum does not agree LA proposal

Function	Local authority	Schools forum	DfE role
<ul style="list-style-type: none"> • funding for good or outstanding schools with falling rolls where growth in pupil numbers is expected within three years 			
<p>Central spend on:</p> <ul style="list-style-type: none"> • early years block provision • funding to enable all schools to meet the infant class size requirement • back-pay for equal pay claims • remission of boarding fees at maintained schools and academies • places in independent schools for non-SEN pupils • admissions • servicing of schools forum • Contribution to responsibilities that local authorities hold for all schools 	Proposes	Decides	Adjudicates where schools forum does not agree LA proposal
<p>Central spend on:</p> <ul style="list-style-type: none"> • capital expenditure funded from revenue – projects must have been planned and decided on prior to April 2013 so no new projects can be charged • contribution to combined budgets – this is where the schools forum agreed prior to April 2013 a 	Proposes up to the value committed in the previous financial year and where expenditure has already been committed.	Decides for each line	Adjudicates where schools forum does not agree LA proposal

Function	Local authority	Schools forum	DfE role
<p>contribution from the schools budget to services which would otherwise be funded from other sources</p> <ul style="list-style-type: none"> existing termination of employment costs (costs for specific individuals must have been approved prior to April 2013 so no new redundancy costs can be charged) prudential borrowing costs – the commitment must have been approved prior to April 2013 	<p>Read establishing local authority DSG baselines for more information.</p>		
<p>Central spend on:</p> <ul style="list-style-type: none"> high needs block provision central licences negotiated by the Secretary of State 	<p>Decides</p>	<p>None, but good practice to inform forum</p>	<p>None</p>
<p>Scheme of financial management changes</p>	<p>Proposes and consults the governing body and Head of every school</p>	<p>Approves (schools members only)</p>	<p>Adjudicates where schools forum does not agree LA proposal</p>
<p>Membership: length of office of members</p>	<p>Decides</p>	<p>None (but good practice would suggest that they gave a view)</p>	<p>None</p>
<p>Voting procedures</p>	<p>None</p>	<p>Determine voting procedures</p>	<p>None</p>

Function	Local authority	Schools forum	DfE role
Chair of schools forum	Facilitates	Elects (may not be an elected member of the Council or officer)	None



Schools Forum - Induction

December 2022



Role of Schools Forum

The Forum is established in accordance The Schools Forums (England) Regulations 2012 (as amended)

The Forum acts as a consultative body on some issues and a decision making body on others

Role of Schools Forum

The forum acts in a **consultative role** for:

- changes to the local funding formula (the local authority makes the final decision)
- proposed changes to the operation of the minimum funding guarantee
- changes to or new contracts affecting schools
- arrangements for pupils with special educational needs, in pupil referral units, and in early years provision

The forum **decides**:

- how much funding may be retained by the local authority within the dedicated schools grant (for example, providing an admissions service, or providing additional funding for growing schools)
- funding for central early years expenditure, which may include funding for checking eligibility of pupils for an early years place, the early years pupil premium, or free school meals
- any proposed carry forward of deficits on central spend from one year to the next
- proposals to de-delegate funding from maintained primary and secondary schools (for example, for staff supply cover, insurance, behaviour support)
- changes to the scheme of financial management

Schools Forum Constitution

- Most recent version – January 2022 – updated version to be agreed at December 2022 meeting
- To be updated annually
- Published on the Council website
- Outlines membership and terms of operation of the Schools Forum

Schools Forum Membership

- DfE guidance stipulates that:
 - Schools and academies members together must number at least two-thirds of the total membership of the schools forum and the balance between maintained primary, maintained secondary and academies members must be broadly proportionate to the pupil numbers in each category, so the structure of Forum should be regularly reviewed, e.g. annually.
 - Membership should reflect most effectively the profile of education provision across the local authority to ensure that there is not an in-built bias towards any one phase or group.

Schools Forum Membership

- The current constitution states that there shall be thirty members of the Forum comprising the following:
 - Thirteen elected schools members,
 - Eleven elected academies members,
 - Six other members.
- The break down of membership within those wider groups is detailed in the constitution and is subject to review and change to ensure membership reflects the mix of pupils across different types of schools in Buckinghamshire.

Local Authority Representation on the Forum

- Only specific officers can speak at meetings of the schools forum.
- These officers are:
 - Director of Children's Services or their representative
 - Chief Financial Officer or their representative
 - Any person invited by the schools forum to provide financial or technical advice
 - Any person presenting a paper to the schools forum but their ability to speak is limited to the paper that they are presenting.

Schools Forum Operation

- Schools Forum meetings are held in public
- Papers are published on the BC website and are published one week in advance
- Schools Forum meetings are usually held 5 times per year – January, March, June, October and December
- The standing sub-committees of the Forum are:
 - 1) The Schools Forum Funding Group (SFFG);
 - 2) The Schools Specific Contingency Group;
 - 3) The Dedicated Schools Grant (DSG) Spending Review Group;
 - 4) The Early Years Forum.
- Each has its own terms of reference
- It has also been the practice in Buckinghamshire to agree to hold a Maintained Schools Committee meeting each year to consider proposals on de-delegation

Schools Forum – Forward Plan

Shaped by:

- The budget cycle including any consultation on arrangements for any of the DSG funding blocks
- Government announcements and consultations on changes to funding arrangements for schools and early years
- Issues arising from governor and head teacher groups or other related workstreams eg, Needs and Provision Group
- Major contract procurement affecting schools

Effective Schools Forums

DfE guidance stresses effective relationship between LA and its Schools Forum needs the following characteristics:

- **Partnership:** Having a shared understanding of the priorities, issues and concerns of schools, academies and the local authority.
- **Effective Support:** The business of the schools forum is supported by the local authority in an efficient and professional manner.
- **Openness:** It is important that a schools forum feels it is receiving open, honest and objective advice from its local authority.
- **Responsiveness:** Local authorities should as far as possible be responsive to requests from their schools forums and their members. Schools forums themselves should also be aware of the resource implications of their requests.
- **Strategic view:** Members of schools forum should consider the needs of the whole of the educational community, rather than using their position on a schools forum to advance their own sectional or specific interests.
- **Challenge and Scrutiny:** schools forums may be asked to agree to proposals from their local authority that will have an effect on all schools and academies in the local area. The extent to which schools forums can scrutinise and challenge such proposals is an important aspect of their effectiveness.

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Report to Schools Forum

Date: 6th December 2022

Title: Membership 2022-23

Author: Liz Williams, Head of Finance – Children’s Services

Recommendations:

- a) To agree the draft constitution for Schools Forum.
- b) To seek representatives from the Primary Academy, Secondary Academy (Upper and Grammar), Maintained Nursery and Maintained PRU sector in line with the current constitution.

Reason for decision: to agree the updated constitution and the number of representatives from each sector.

1 Purpose of Report

- 1.1 The purpose of this agenda item is to review the membership of schools forum to ensure it is in line with the pupil numbers in academies and maintained schools, and to confirm the updated constitution so that this can be published.
- 1.2 Elections will then need to be held to seek representatives for vacancies on the schools forum.

2 Constitution

- 2.1 The Schools Forum constitution has been reviewed and it is proposed it be updated to reflect the change a to the membership. The draft constitution is attached as Appendix A to this report.
- 2.2 The Schools Forum’s constitution sets out the rules for schools forum membership and this is set in line with the DfE’s guidance on schools forum structure.

- 2.3 DfE guidance is that the split of membership for maintained and academy schools should be reflective of the proportion of pupils in each sector. Within Buckinghamshire it has been further agreed that the split of membership should also reflect local circumstances, namely to clearly set out secondary upper and secondary grammar schools representation.
- 2.4 The current constitution details the school membership of schools forum as follows:
- i. One maintained nursery school member (either head teacher or governor);
 - ii. Three special school members
 - a. Two maintained special school members (preferably one head teacher and one governor);
 - b. One academy school member (either head teacher or governor);
 - iii. Eight secondary school members
 - a. One maintained secondary school
 - b. Four academy secondary schools (preferably two head teacher and two governors);
 - c. 3 academy grammars
 - iv. Two pupil referral unit (PRU) members (preferably one head teacher and one governor);
 - v. Ten primary school members
 - a. Two maintained infant school members (preferably one head teacher and one governor);
 - b. Two maintained junior school members (preferably one head teacher and one governor);
 - c. Four maintained combined school members (preferably two head teachers and two governors);
 - d. Two academy school members (preferably one head teacher and one governor).

3 Review of Current Membership – mainstream schools

3.1 In order to ensure that the membership of schools forum is representative of pupil numbers in each type of school have been reviewed and compared to the current constitution. The outcome of that review is summarised in the table below.

Review of pupil numbers and Schools Forum membership: Based on January 2022 Census Data

Schools by Type and Pupil Numbers				Membership Based on Pupil Numbers		Current Constitution		Current Members	
School Type	Total Schools	Pupil Numbers	% of Total Pupils	Maintained	Academy	Maintained	Academy	Maintained	Academy
Primary Maintained	141	33854	39%	7		8		7	
Primary Academy	46	12498	14%		3		2		2
Secondary Maintained	5	5871	7%	1		1		1	
Secondary Academy/Free/UTC (Upper)	18	17296	20%		4		4		3
Secondary Academy (Grammar)	13	16854	20%		3		3		2
Sub Total	223	86373	100%	8	10	9	9	8	7
Nursery Maintained	2	267		1		1		0	
Special Maintained	8	1226		2		2		2	
Special Academy	2	363			1		1		1
Pupil Referral Unit	3	75		1		1		0	1
Total	238	88304		12	12	13	11	10	9

3.2 The data indicates that the current constitution is no longer representative of pupil numbers. Based on this data there are currently vacancies for primary academy, Secondary academy, maintained nursery and maintained PRU representatives.

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BUCKINGHAMSHIRE SCHOOLS FORUM CONSTITUTION

1 Name

1.1 The Buckinghamshire Schools' Forum ("the Forum").

2 Terms of reference

2.1 The Forum is established in accordance with Section 47A of the School Standards and Framework Act 1998, and the Schools Forums (England) Regulations 2012.

3 Status

3.1 The Forum exists to advise Buckinghamshire Council ("BC") on various matters prescribed by law. It also exists to take certain decisions in its own right.

3.2 The "Schools Revenue Funding Operational guide" sets out the relevant roles, responsibilities and powers of the Local Authority and the Schools Forum.

4. Membership

4.1 The Forum shall consist of the following three types of members:

- (a) "Schools members," defined as members elected to represent governing bodies and head teachers of schools maintained by BC;
- (b) "Academies members," defined as members who represent the proprietors of academies situated in BC's area;
- (c) "Other members", defined as members other than schools members or academies members who represent the interests of wider stakeholders.

4.2 There shall be thirty members of the Forum comprising the following:

- (a) Twelve elected maintained schools members,
- (b) Twelve elected academies members,

(c) Six other members.

4.3 The schools members referred to in 4.1(a) shall consist of the following sub-groups:

(a) One maintained nursery school member (either head teacher or governor);

(b) Three special school members

- Two maintained special school members (preferably one head teacher and one governor);
- One academy school member (either head teacher or governor);

(c) Eight secondary school members

- One maintained secondary school
- Four academy secondary schools (preferably two head teacher and two governor);
- 3 academy grammars

(d) Two pupil referral unit (PRU) members (preferably one head teacher and one governor)

- One maintained PRU member (Either head teacher or governor);
- One academy PRU member (either head teacher or governor);

(e) Ten primary school members

- Two maintained infant school members (preferably one head teacher and one governor);
- Two maintained junior school members (preferably one head teacher and one governor);
- Three maintained combined school members (preferably two head teachers and one governors);
- Three academy school members (preferably two head teachers

and one governor);

4.4 The maintained schools members must include at least one head teacher and one governor.

4.5 The academies members referred to in 4.1(b) above:

- a) May include but will not necessarily be restricted to academy principals and governors; will preferably include at least one representative of primary academy proprietors;
- b) Must include at least one representative of a special academy proprietor, in the event that there is such an academy within Buckinghamshire;
- c) Must include at least one representative of an alternative provision academy, in the event that there is such an academy within Buckinghamshire.

4.6 The other members referred to in 4.1 (c) above shall consist of:

- a) Two representatives nominated by recognised teachers' trade unions;
- b) Two representatives nominated by the diocesan authorities; Two representatives nominated by the Early Years Forum at least one of whom who will be there explicitly to represent early years providers from the private, voluntary and independent (PVI) sector;
- c) Such other members as may be appointed by BC save that other members shall never number more than a third of the total membership.

4.7 The following categories of people are barred from being other members:

- (a) Elected Members of BC who are appointed to the executive of i.e. a Lead Member or portfolio holder; ('Executive Members');
- (b) The Director of Children's Services or any officer employed or engaged to work under the management of the Director of Children's Services, and who does not directly provide education to children; (or manage those who do)

- (c) Other officers with a specific role in management of and/or who advise on funding for schools;
- (d) Additionally, the Forum may from time to time consist of observers including an observer appointed by the Secretary of State for Education. Observers shall be entitled to attend meetings but shall not be members and shall not have any voting rights.

5 Election & Appointment of Members

5.1 Schools members and academies members will each be responsible for their own election processes save that the following rules and restrictions shall apply:

- a) A single person may not represent more than one group concurrently;
- b) Election of members from different parts of the County shall be encouraged to ensure the Forum is representative of education provided across the geographic areas, having regard to pupil numbers and school numbers, and that no one geographic area can be seen to have an unfair bias on the Forum;
- c) Members shall be elected or appointed for the period of three years from the date of their election or appointment;
- d) Members shall be eligible for re-election or reappointment at the end of their period of membership;
- e) Members will cease to be a member if he or she resigns from the Schools Forum or no longer occupies the office by which he or she became eligible for election, selection or appointment to the Schools Forum;
- (f) In the case of an, other member the member shall cease to be a member if he or she is replaced by BC, or at the request of the body which the member represents, or by another person nominated by

that body;

- g) BC may end the appointment of any member before the expiry of his or her term if the member concerned ceases to hold the office by virtue of which he or she became eligible for appointment or election to the Forum;
- h) Elections should be organised so that each of the sub-groups listed at 4.3, 4.5(c) and 4.5(d) is able to choose a representative of its own;
- i) In the event that an election results in a tie between two or more candidates, BC may choose which candidate shall become a member.

5.2 BC will offer appropriate support to each of the groups referred to in 4.2 above in managing its election process and if so requested will devise a model scheme in consultation with the Forum which it will then invite the Forum to adopt.

5.3 Other members will be appointed by BC in consultation with the bodies listed in 4.6 above and, where BC deems appropriate, with wider stakeholders.

6 Meetings

6.1 There shall be at least four meetings per year of the Forum but more meetings may be held if the Forum deems it necessary (up to a maximum of 8). All meeting times will be agreed by the Forum for the coming year and will vary to accommodate the needs of members and to meet any specific deadlines imposed by the Department for Education.

6.2 All meetings shall be quorate if at least two fifths of the total current members (excluding vacancies) are present. Inquorate meetings may still proceed but cannot legally make decisions, however inquorate meetings can still be consulted with and provide an "unofficial" view or response to BC.

- 6.3 All meetings of the Forum will be convened by the clerk, but he or she will comply with any direction in the matter given by the Forum in a meeting or given by the Chairman (or in his or her absence the Vice Chairman).
- 6.4 Written notice of a meeting, along with a copy of the agenda and papers for the meeting will be given at least five working days before the date of the meeting itself.
- 6.5 All meetings of the Forum will be open to members of public. Furthermore, papers, agendas and minutes must and will be made publicly available in a timely manner on the BC website.
- 6.6 All members have the right to speak at meetings of the Forum and the following persons may also speak, even though they are not members:
- a) The Director of Education for BC, or a designated representative;
 - b) The Chief Finance officer for BC, or a designated representative;
 - c) Any elected member of BC with primary responsibility for Children's Services or Education;
 - d) Any Elected Member of BC with primary responsibility for BC's resources;
 - e) Any person who is invited by the Forum to attend in order to provide financial or technical advice to the forum;
 - f) An observer appointed by the Secretary of State;
 - g) Any person presenting a paper or other item to the Forum that is on the meeting's agenda, but that person's right to speak: shall be limited to matters related to the item that the person is presenting.
 - h) Any other person with the permission of the Chairman, at the Chairman's discretion, (or the Vice Chairman in the Chairman's absence).
- 6.7 The minutes of proceedings of the Forum will be drawn up by the clerk and will be signed at the same or next subsequent meeting by the Chairman.

Proceedings of the Forum shall not be invalidated by any defects in the election or appointment of any member, or the appointment of the Chairman or Vice Chairman. Nor does the existence of any vacancy on the Forum invalidate proceedings.

7 Alternates / Substitutes

- 7.1 Any member of the Forum may nominate an alternate member ('the alternate member') to attend meetings of the Forum in his or her absence. The alternate member must come from the same sector as that of the member they are covering.
- 7.2 Where a member has nominated an alternate member, the alternative member may attend and vote in place of the member. A member may only nominate an alternate member who would himself or herself be eligible to be appointed or elected to the Forum under the same category as the member.
- 7.3 The name of the alternate member must be notified to the clerk of the Forum at least 24 hours in advance of the meeting in question where possible.

8 Chairman and Vice Chairman

- 8.1 The members must elect a person as Chairman (and preferably a Vice Chairman) from among their number and determine the term of office, as one calendar year.
- 8.2 The members of the Forum may not elect as Chairman any member of the Forum who is an Elected Member or officer of BC, even if they are members of the Forum by virtue of representing a school, academy or other group or sector.
- 8.3 The Chairman and Vice Chairman will hold office until the next meeting which falls after the date which is a year after the meeting at which they were originally elected.
- 8.4 On ceasing to hold office, the Chairman and Vice Chairman shall be

eligible for re- election.

8.5 In the event of a casual vacancy in the office of Chairman or Vice Chairman, the Forum shall, at their next meeting, elect one of their membership to fill that vacancy and the member so elected shall hold office until the date of the meeting to which the previous Chairman or Vice Chairman would have held office had the vacancy not occurred.

8.6 A Chairman or Vice Chairman shall cease to hold office if:

- a) He or she resigns his or her office by written notice given to the clerk; or
- (b) He or she ceases to be a member of the Forum.

9 Clerk

9.1 The Forum shall be assisted by a clerk ('the clerk').

9.2 The clerk may either be an employee of BC or independent.

9.3 A member may not also act as the clerk, nor will the clerk be treated as a member.

9.4 None of the people listed in 4 above may be the clerk.

9.5 The clerk shall attend all meetings, assisting and taking instructions from the Chairman.

9.6 The clerk's role may include but will not necessarily be limited to the following:

- a) Providing a link between the Forum and BC;
- b) Managing meeting logistics including dispatching papers;
- c) Taking a note of proceedings.
- d) Maintaining an action log of points agreed at a meeting.
- e) Providing technical advice to the Forum on the constitution and the law.
- (f) Providing the route by which members can access further information and co-ordinate communication to schools forum members outside of the formal meeting cycle, responding to any queries about the business of the Forum from head teachers, governors and others who are not on it themselves;

- (g) Being responsible for ensuring contact details of all members are up to date; maintaining the list of members on the schools forum and advising on membership issues in general;
- (h) Assisting with the co-ordination of nomination/election processes run by the constituent groups;
- (i) If appropriate, providing technical advice in relation to the Schools Forum Regulations and in relation to the operation of this Constitution; and organising, operating and recording any voting activity of the Forum in line with the provisions of this Constitution.

10 Sub-Committees

10.1 The Forum may set up sub-committees, either standing or ad-hoc, to carry out tasks as specified by the Forum.

10.2 The Forum shall decide the terms of reference and membership of any standing sub- committees and membership may include those who are not members of the Forum. The Forum should review standing sub-committee membership and terms of reference annually.

10.3 Each standing sub-committee will have a minimum of five members with a quorum of three Forum members.

10.4 Membership and terms of reference of any ad-hoc sub-committee shall be decided when establishing the sub-committee, and may include those who are not members of the Forum. The duration of any ad-hoc sub-committee shall be established and entered in the terms of reference when the group is established.

10.5 The members of each sub-committee will choose a Chairman and if required a Vice Chairman. The Chairman or Vice Chairman of the Forum may also be appointed as Chairman or Vice Chairman of any sub-committee.

10.6 All sub-committees will be closed meetings but the sub-committee Chairman must report back to the Forum at the next available meeting and

the report will be included in the Forum minutes.

10.7 Sub-committees shall provide advice and make recommendations to the Forum but are unable to take decisions or provide views to consultation without reference to the Forum unless specifically agreed in the terms of reference for that sub-committee. Where a decision making power is conveyed by the Schools Forum Regulations to the Forum, the Forum cannot delegate this power to a sub-committee. Any recommendations from a sub-committee are to come back to the forum for a recorded vote.

10.8 The standing sub-committees of the Forum are:

- a) The Schools Forum Funding Group (SFFG);
- b) The Early Years Forum
- c) Schools Specific Contingency Group
- d) DSG Spending Review Group.

11 Voting

11.1 Every question to be decided at a meeting of the Forum will be determined by a majority of the votes of members present, and in the case of an equality of votes the Chairman will have a second or casting vote, save that:

- a) Voting on the funding formula shall be limited to schools members, academies members and the early years others members;
- b) Voting on de-delegation will be limited to the specific primary and secondary schools members i.e. only primary school members may vote on primary school de-delegation and only secondary school members may vote on secondary school de-delegation.

11.2 Any formal recommendations made to BC shall be determined by a majority of the votes of members present at a meeting of the Forum and not by sub-groups.

11.3 There will be clarity in the procedures for recording the outcome of a vote, and any resolutions the Forum makes in relation to any vote taken.

11.4 When voting, members have a responsibility to represent the interests of their

peer group as a whole rather than the interests of their own school/institution.

12 Provision of Account to Schools

12.1 The Forum shall as soon as reasonably practicable inform the governing bodies of schools maintained by the Council of all consultations carried out under clause 11 above.

13 Expenses

13.1 BCC shall meet the expenses of the Forum. Expenses shall be charged to the Schools Budget. The Forum budget cannot increase above the previous years' level without approval of the Secretary of State for Education.

13.2 There is an entitlement for members of the Forum to claim expenses. BC shall reimburse all reasonable expenses of members in connection with attendance at meetings of the Forum. This shall include:

- a) Travelling expenses;
- b) Childcare or other care costs; (up to a prescribed maximum from time to time in force)
- c) Financial loss of earnings may be claimed (up to a prescribed maximum from time to time in force) but is only available to those not employed at a school maintained by Buckinghamshire Council and where a financial loss has been suffered.

14 Review of the Constitution

14.1 The Forum will review its constitution annually to ensure that it continues to meet statutory requirements and continues to proportionately represent the education community of Buckinghamshire having regards to pupil numbers.

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Report to Schools Forum

Date: 6th December 2022

Title: Dedicated Schools Budget – Revenue Budget Monitoring 2022-23

Author: Liz Williams, Head of Finance, Children’s Services

Recommendations:

Schools Forum is asked to note the revenue budget monitoring forecast at the end of October (Period 7)

Reason for decision: For Information

1. Purpose of the Report

1.1. This report updates Schools Forum on the current forecast for the Dedicated Schools Grant (DSG) budget for the 2022-23 financial year, based on the spend to 31st October 2022 (period 7).

2. Forecast 2022-23

2.1. The overall Dedicated Schools Budget is currently projected to underspend by £0.25m as at the end of October.

	Budget £'000	Forecast £'000	Forecast Variance £'000	%
Central Block	5,054	5,168	114	2%
Early Years Block	34,579	33,513	-1,066	-3%
High Needs Block	104,004	104,706	702	1%
Schools Block	175,419	175,419	-0	0%
	319,056	318,806	-250	

2.2. The main reason for the projected underspend is a forecast underspend of £1.066m for the early years block. This reflects lower take up of places for vulnerable 2 year olds. It is likely that the DSG settlement for 2022-23 will be adjusted downwards to reflect this lower take up if numbers in the January 2023 early years census remain low and therefore a proportion of this underspend will be clawed back in 2023-24.

- 2.3. A summary of the current forecast against the high needs block is attached as an appendix to this report. High needs budgets are projected to overspend by £0.7m this year. The forecast takes into account the unallocated contingency of £1.7m and includes pressures against the budgets for independent special schools, personal budgets and mainstream top ups, alternative provision and integrated therapies.
- 2.4. It is likely that the forecast in future months will also include pressures against the budget for BC special schools and academies. From September a number of additional places have been funded across special schools in order to meet demand. By supporting additional places in Buckinghamshire provision the need for placements in the independent sector can be reduced
- 2.5. Schools block is currently projected to break even.
- 2.6. Central schools services block is projected to overspend by £0.114m due to pressures against the budget for Premature Retirement Costs as costs continue to exceed the available budget.

3. DSG Reserve

- 3.1. Any variance against the DSG is to be managed through the DSG reserve which is ringfenced. At the start of the 2022-23 financial year the council had a deficit of £3.6m against its DSG reserve.
- 3.2. The current projected overspend will reduce the deficit at the end of the year however as noted earlier in this report there is the potential for a clawback of the underspend against the early years block.

High Needs Block - Revenue Budget Monitoring Period 7**Appendix 1**

Expenditure Type	2022-23 budget £'000		Period 7 Forecast £'000	Forecast Variance £'000
Placements/Top-ups 5-16 year olds				
Independent Special Schools	15,747		16,247	500
Other LA Special Schools (net)	4,686		4,686	0
BC Special Schools	35,515		35,515	0
ARPs	3,849		3,849	0
Mainstream Top-Ups with EHCP	13,602		14,955	1,353
Total Placement/Top-ups in Schools (5-16 year olds)	73,398		75,252	1,853
Post-16 Placements				
Post-16 (Independent and FE College)	11,996		11,612	-384
Early Years Top-Ups				
Early Years pupils with EHCPs	845		845	0
Total support for pupils with EHCPs (places and top ups)	86,240		87,709	1,469
SEN Support/Pupils without plans - Early Years	573		573	-
SEN Support/ Pupils without plans	474		474	-
Total top ups for pupils without EHCPs	1,046		1,046	-
Total Spend on Places and Top-ups for Pupils	87,286	84%	88,755	1,469
Alternative Provision				
Pupil Referral Units	2,533		2,533	0
Alternative Provision	1,396		1,900	504
Hospital Tuition Service	237		237	0
Home Tuition Service	218		218	0
Total Alternative Provision - spend on Pupils	4,383	4%	4,887	504
Commissioned Contracts				
Integrated Therapies	2,207		2,728	521
Total Commissioned Contracts	2,207	2%	2,728	521
Other support for pupils and schools				
Specialist Teaching and support for pupils	2,883		2,883	0
Support for Vulnerable Pupils	871		871	0
Educational Equipment	300		300	0
Portage	280		282	2
Reintegration	412		412	0
Support for the Education of Looked After Children	742		669	-72
Unallocated High Needs Contingency	1,756		0	-1,756
Teachers Pay and Pension Grants and other central costs	2,883		2,918	35
Total Contribution Other support	10,127	10%	8,335	-1,792
Total Spend	104,004	100%	104,706	702

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Report to Schools Forum

Date: 6th December 2022

Title: NFF Operational Guidance and School Budget Proposals 2023-24

Author: Liz Williams, Head of Finance – Children’s Services

Recommendations:

Schools Forum is asked to:

- a. Note the information set out in the report, including the accompanying appendices, showing indicative allocations for 2023-24. Note that modelling is based on October 2021 census data. Final DSG allocations are due in December 2022 and will be updated for October 2022 census data.
- b. Note the announcement made as part of the Autumn budget, we await the guidance around how this money will be distributed and how it will affect the funding formula. As above all modelling is based on the indicative allocations published in July 2022.
- c. To note the updated modelling for the Central Schools Services Block and the increased allocation for the High Needs Block for 2023-24.
- d. To agree to the disapplication request regarding the exceptional rent factor

1. Purpose of Report

- 1.1. The purpose of this report is to update Schools Forum on the modelling of the local funding formula for 2023-24.
- 1.2. Updated modelling is also provided for the Central Schools Services Block.
- 1.3. Work continues on the development of the DSG Management Plan template and this will inform the future model for demand against high needs budget to be considered by Schools Forum in January 2023.

2. Background

- 2.1. In October, Schools Forum would normally consider the updated Schools Revenue Funding 2023 to 2024 Operational [Guide](#) issued by the DfE and agree the principles

for the local funding formula in 2023-24. This meeting did not take place and the following assumptions have been applied to the initial modelling:

- a) Adopt the National Funding Formula factors.
- b) Adopt the Minimum Per Pupil funding levels at the values defined in the NFF and prorate (scale) of all other factors in the formula to match the available allocation of funding from the DfE.
- c) Set a Minimum Funding Guarantee (MFG) at +0.5%.

2.2. As agreed last year we will not consult with schools as there is no change to the MFG or on any proposals to move funding between DSG blocks.

3. Indicative DSG Allocation 2023-24

3.1. The provisional DSG allocation for the Schools Block, High Needs Block and Central Schools Services Block is as follows:

DSG Block	Provisional Allocation 2023-24	2022-23 Allocation	Increase/ (Decrease)	% Change
	£m	£m	£m	
Schools Block	403.492	387.291	16.201	4%
High Needs Block	117.719	112.02	5.699	5%
Central Schools Services Block	4.887	5.295	-0.408	-8%
Total	526.098	504.606	21.492	4%

3.2. The provisional allocation is based on the October 2021 census and will be updated for the October 2022 census in December.

3.3. The allocation for the schools block 2023-24 excludes the allocation for growth funding, a calculator is provided to local authorities to enable the potential growth funding to be estimated.

4. Schools Block – Modelling of the 2023-24 Formula

4.1. Using the indicative allocations as noted above, the local funding formula has been modelled using the principles listed above and applying a Minimum Funding Guarantee of 0.5%. Based on the October 2021 census data, the proposed model is affordable within the Schools Block budget available without needing to cap any gains.

4.2. Appendices 1 to 3 show the impact of the proposed model on funding rates, funding levels and school by school allocations. The impact is summarised below:

Illustrative Funding Levels Funding Factors	2022/23 Final Rates	2023/24 Indicative Funding Model
Scaling factor (% of NFF)	100.00%	100.00%
	£m	£m
Total through funding formula	387.72	404.95
Growth Fund	1.26	2.70
Total cost to schools block	388.97	407.65
Met from :		
Pupil Led Funding	381.18	400.03
Premises Funding	3.73	3.46
Growth Funding	2.37	3.28
Transfer from Growth Reserves	1.68	0.88
Total Funding Available	388.97	407.65

No. of Schools Protected	4	12
No. of Schools Capped	0	0

	£	£
Cost of MFG Protection	71,443	52,666

5. Disapplication request – Exceptional Rent Factor

- 5.1. Due to the length of time since the exceptional rent factor was agreed we are required to reapply to be able to continue using the factor.
- 5.2. The factor is used to support those schools that require additional premises, currently we fund three schools at a total of £86,678 this is included within the modelling and affordable.
- 5.3. To be able to use this factor we have to demonstrate to the DfE that only a small proportion of schools are eligible, that the cost is over 1% of their School Budget Share and that the Schools Forum have been consulted and agree to the disapplication.

6. Growth Fund

- 6.1. Appendix 4 shows the estimated use of growth funding in 2023-24 based on the current agreed criteria. The summary for the current year indicates that there will be an underspend against the allocation in the current year however school places

are proving difficult to predict and we have limited space in some year groups it would therefore be prudent to roll forward any underspend as an earmarked reserve to support future growth fund requirements.

6.2. The schools revenue funding guidance from the Department for Education (DfE) states that *“local authorities should report any unspent growth funding remaining at the year-end to the schools forum. Funding may be carried forward to the following funding period, as with any other centrally retained budget, and local authorities can choose to use it specifically for growth. Any overspent growth funding will form part of the overall DSG surplus or deficit balance.”*

7. Central Schools Services Block (CSSB)

7.1. The CSSB continues to provide funding for local authorities to carry out central functions on behalf of maintained schools and academies, comprising two distinct elements:

- ongoing responsibilities
- historic commitments

7.2. Local authorities will continue to be protected so that the maximum per-pupil year-on-year reduction in funding for ongoing responsibilities is -2.5%, while the year-on-year gains cap will be set at the highest affordable rate of 5.86%.

7.3. The indicative allocation for the CSSB for 2023-24 is £4.887, a reduction of £408k on the current year. Appendix 5 summarises the projected allocation for the CSSB over the next 3 years and the gap in funding. The estimated gap for 2023-24 is £11.9k taking into account the savings proposals agreed in January 2022.

8. High Needs Block

8.1. The provisional allocation for the High Needs Block in 2023-24 is £117.7m, an increase of £5.7m (5%) compared to the current year.

8.2. Detailed modelling on the high needs block, to include updated forecasts for this year and projected demand in future years, will be brought to the January meeting. This will also take into account recommendations from the DSG Spending Review Group on the prioritisation of funding to support the DSG Management Plan.

9. Early Years Block

9.1. The Early Years Block for 2023-24 will be announced in December 2022. The initial allocation is expected to be based on the January 2022 census.

Illustrative Funding Rates Funding Factors	2021/22 Final Budget Rates	2022/23 Indicative Model
Scaling factor (% of NFF)	100.00%	100.00%
Primary AWPU	£ 3,309.30	£ 3,491.51
KS3 AWPU	£ 4,666.14	£ 4,922.47
KS4 AWPU	£ 5,258.66	£ 5,547.94
Primary MFL	£ 4,265.00	£ 4,405.00
Secondary MFL	£ 5,525.00	£ 5,715.00
Primary FSM	£ 483.48	£ 493.79
Secondary FSM	£ 483.48	£ 493.79
Primary FSM6	£ 606.93	£ 725.25
Secondary FSM6	£ 889.82	£ 1,059.59
Primary IDACI band F	£ 226.31	£ 236.61
Secondary IDACI band F	£ 329.18	£ 344.62
Primary IDACI band E	£ 277.75	£ 288.04
Secondary IDACI band E	£ 437.19	£ 457.78
Primary IDACI band D	£ 432.05	£ 452.64
Secondary IDACI band D	£ 612.07	£ 637.81
Primary IDACI band C	£ 473.20	£ 493.79
Secondary IDACI band C	£ 668.65	£ 699.54
Primary IDACI band B	£ 504.06	£ 524.65
Secondary IDACI band B	£ 720.08	£ 750.97
Primary IDACI band A	£ 658.36	£ 689.25
Secondary IDACI band A	£ 915.53	£ 956.72
Primary Low Attainment	£ 1,162.42	£ 1,188.18
Secondary Low Attainment	£ 1,759.06	£ 1,800.28
Primary EAL	£ 581.21	£ 596.66
Secondary EAL	£ 1,573.90	£ 1,609.96
Primary Mobility	£ 951.54	£ 972.15
Secondary Mobility	£ 1,368.16	£ 1,399.07
Lump Sum	£ 124,780.10	£ 131,677.44
Sparsity Primary (up to)	£ 56,577.95	£ 57,917.50
Sparsity secondary (up to)	£ 82,295.20	£ 84,252.99
MFG	0.50%	0.50%
Capping	No Cap	No Cap
Fringe uplift where applicable	1.76%	1.84%

All funding rates include the Area Cost Adjustment (ACA)

No. of Schools Protected	4	12
No. of Schools Capped	0	0

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Illustrative Funding Levels Funding Factors	2022/23 Final Budget	2023/24 Indicative Model
Scaling factor (% of NFF)	100.00%	100.00%
Primary AWPU	£146,210,390	£154,291,282
KS3 AWPU	£92,587,883	£96,726,536
KS4 AWPU	£64,965,486	£68,539,251
Primary MFL	£3,201,823	£2,013,944
Secondary MFL	£3,937,265	£2,757,582
Primary FSM	£2,999,149	£3,064,164
Secondary FSM	£1,666,959	£1,689,093
Primary FSM6	£3,986,890	£4,765,717
Secondary FSM6	£3,886,985	£4,590,794
Primary IDACI band F	£1,330,285	£1,394,550
Secondary IDACI band F	£1,211,288	£1,254,702
Primary IDACI band E	£285,267	£295,767
Secondary IDACI band E	£324,103	£335,671
Primary IDACI band D	£32,253	£33,661
Secondary IDACI band D	£42,525	£44,165
Primary IDACI band C	£129,008	£134,423
Secondary IDACI band C	£125,794	£129,819
Primary IDACI band B	£3,042	£3,167
Secondary IDACI band B	£4,342	£4,529
Primary IDACI band A	£1,330	£1,392
Secondary IDACI band A	£5,515	£5,763
Primary Low Attainment	£12,984,457	£13,276,252
Secondary Low Attainment	£9,902,599	£10,013,575
Primary EAL	£2,452,759	£2,521,881
Secondary EAL	£723,517	£735,117
Primary Mobility	£437,173	£446,578
Secondary Mobility	£20,589	£21,054
Lump Sum	£27,649,190	£29,232,392
Sparsity Primary (up to)	£800,930	£819,964
Sparsity secondary (up to)	£37,307	£46,708
MFG	£71,443	£52,666
Capping	£0	£0
Other factors	£197,918	£197,918
Rates	£3,524,920	£3,330,671
Fringe uplift where applicable	£1,975,646	£2,174,794
Total through funding formula	£387,716,029	£404,945,537
Growth Fund	£1,255,315	£2,700,517
Total cost to schools block	£388,971,344	£407,646,054
Pupil Led Funding	£381,183,767	£400,031,156
Premises Funding	£3,734,101	£3,460,699
Growth Funding	£2,372,935	£3,275,670
Transfer from Reserves	£1,680,541	£878,529
Total Funding Available	£388,971,344	£407,646,054
No. of Schools Protected	4	12
No. of Schools Capped	0	0

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Illustrative School Level Funding - School Name	Type	Sector	Final Budget 2022/23	2023/24 Indicative Model	Variance	MFG 2022/23	2023/24 Indicative Model	Pupil No.s October 2021 + Sept 22 Growth	Pupil No.s October 2021 + Sept 23 Growth
Mary Towerton School	I	Primary	324,708	342,622	6%	0	0	45	45
Chalfont St Giles Infant School	I	Primary	794,541	836,732	5%	0	0	175	175
Newtown Infant School	I	Primary	892,629	939,259	5%	0	0	172	172
Dagnall School #	I	Primary	418,779	404,505	-3%	0	0	62	53
East Claydon School	I	Primary	496,608	522,563	5%	0	0	90	90
Denham Village School #	I	Primary	463,938	451,518	-3%	2,539	0	84	75
Drayton Parslow Village School	I	Primary	332,448	349,178	5%	0	0	44	44
Dropmore Infant School	I	Primary	368,941	390,019	6%	0	0	61	61
Fulmer Infant School	I	Primary	397,117	418,810	5%	0	0	75	75
Haddenham Community Infant School	I	Primary	477,036	502,521	5%	0	0	90	90
Marsh First School	I	Primary	774,287	816,875	6%	0	0	146	146
Hyde Heath Infant School	I	Primary	377,537	398,804	6%	0	0	67	67
Jordans School	I	Primary	410,687	432,687	5%	0	0	74	74
Prestwood Infant School	I	Primary	763,896	806,038	6%	0	0	161	161
Thornborough Infant School	I	Primary	287,761	301,641	5%	0	0	27	27
Tylers Green First School	I	Primary	804,352	846,783	5%	0	0	180	180
Holmer Green First School	I	Primary	806,863	849,587	5%	0	0	179	179
Chalfont St Peter Infant School	I	Primary	790,367	832,828	5%	0	0	174	174
Bedgrove Infant School	I	Primary	1,491,128	1,539,647	3%	0	0	348	348
Carrington Infant School	I	Primary	809,234	854,269	6%	0	0	165	165
Broughton Infant School	I	Primary	819,493	862,626	5%	0	0	175	175
The John Hampden School	I	Primary	1,159,571	1,196,345	3%	0	0	267	267
Chestnut Lane Infant School	I	Primary	824,963	867,857	5%	0	0	180	180
Manor Farm Infant School	I	Primary	878,842	924,830	5%	0	0	191	191
Hannah Ball Infant School	I	Primary	938,838	983,166	5%	0	0	171	171
Iver Heath Infant School	I	Primary	843,226	888,354	5%	0	0	174	174
Farnham Common Infant School	I	Primary	817,394	860,660	5%	0	0	177	177
Turnfurlong Infant School	I	Primary	1,173,749	1,236,173	5%	0	0	267	267
Iver Village Infant School	I	Primary	832,336	878,080	5%	0	0	174	174
Marsh Gibbon C of E School	I	Primary	744,491	787,857	6%	0	0	169	169
Padbury Cof E School	P(A)	Primary	532,740	561,293	5%	0	0	105	105
Whaddon First School	I	Primary	379,114	398,261	5%	0	0	53	53
St George's C of E Infant School	I	Primary	844,821	875,702	4%	0	0	178	178
Coleshill C of E Infant School	I	Primary	313,127	325,978	4%	0	0	41	41
Lee Common C of E School	I	Primary	328,438	339,104	3%	0	0	36	36
Marlow C of E Infant School	I	Primary	775,682	816,807	5%	0	0	178	178
Twyford C of E School	I	Primary	525,051	552,604	5%	0	0	94	94
Maids Moreton C of E School *	I	Primary	392,533	413,721	5%	0	0	72	72
Westcott C of E School	I	Primary	478,209	502,898	5%	0	0	82	82
Mursley C of E School	I	Primary	332,128	348,899	5%	0	0	45	45
Haddenham St Marys C of E School	I	Primary	764,232	805,456	5%	0	0	176	176

Illustrative School Level Funding - School Name	Type	Sector	Final Budget 2022/23	2023/24 Indicative Model	Variance	MFG 2022/23	2023/24 Indicative Model	Pupil No.s October 2021 + Sept 22 Growth	Pupil No.s October 2021 + Sept 23 Growth
Marsworth C of E Infant School	I	Primary	287,402	301,822	5%	0	0	34	34
Little Missenden C of E Infant School	I	Primary	290,844	306,079	5%	0	0	41	41
Ibstone C of E Infant School	I	Primary	447,636	470,068	5%	0	0	71	71
Little Marlow C of E School	I	Primary	370,445	390,104	5%	0	0	66	66
Radnage C of E Primary School	I	Primary	495,786	521,575	5%	0	0	90	90
Speen C of E School	I	Primary	283,581	292,040	3%	10,977	5,118	38	38
Iver Village Junior School	J	Primary	988,521	1,044,421	6%	0	0	209	209
Farnham Common Junior School	J	Primary	1,003,414	1,057,906	5%	0	0	225	225
Woodside Junior School	P(A)	Primary	1,043,060	1,112,163	7%	0	0	240	240
Broughton Junior School	J	Primary	1,047,501	1,103,631	5%	0	0	239	239
Carrington Junior School	J	Primary	1,086,617	1,145,941	5%	0	0	236	236
Iver Heath Junior School	J	Primary	949,352	1,001,549	5%	0	0	204	204
Chalfont St. Giles Junior School	J	Primary	1,019,935	1,075,102	5%	0	0	233	233
Holmer Green Junior School	J	Primary	1,089,671	1,141,726	5%	0	0	249	249
Tylers Green Middle School	J	Primary	1,112,578	1,147,286	3%	0	0	254	254
Prestwood Junior School	J	Primary	950,089	1,000,465	5%	0	0	211	211
Manor Farm Community Junior	P(A)	Primary	1,039,318	1,094,608	5%	0	0	237	237
Haddenham Junior School	J	Primary	1,570,951	1,620,109	3%	0	58	359	359
Turnfurlong Junior School	J	Primary	1,550,838	1,601,317	3%	0	0	362	362
Elangeni School	J	Primary	1,051,286	1,084,080	3%	0	0	240	240
Wendover C of E Junior School	J	Primary	1,497,872	1,546,525	3%	0	66	349	349
Swanbourne C of E School	J	Primary	599,317	618,001	3%	49,286	37,868	116	116
Holy Trinity C of E School	J	Primary	1,514,556	1,563,978	3%	0	0	354	354
Brushwood Junior School	J	Primary	1,138,205	1,200,676	5%	0	0	252	252
The Disraeli School	C	Primary	2,960,665	3,116,072	5%	0	0	644	644
Oak Green School	C	Primary	2,789,178	2,939,972	5%	0	0	608	608
Buckingham Park C of E School	C	Primary	1,793,980	1,893,111	6%	0	0	404	404
Cedar Park School	C	Primary	873,277	900,435	3%	0	13	199	199
Millbrook Combined School	C	Primary	2,694,201	2,837,850	5%	0	0	591	591
Bledlow Ridge School	C	Primary	748,818	787,928	5%	0	0	170	170
The Downley School	C	Primary	1,846,099	1,903,039	3%	0	0	419	419
Cheddington Combined School	C	Primary	951,485	999,108	5%	0	0	218	218
Chenies School	C	Primary	514,325	541,638	5%	0	0	99	99
Waterside Combined School	P(A)	Primary	832,218	879,657	6%	0	0	160	160
Roundwood Primary School	C	Primary	831,707	878,316	6%	0	0	179	179
The Meadows Combined School	P(A)	Primary	645,478	682,300	6%	0	0	123	123
Ley Hill School	C	Primary	923,646	971,864	5%	0	0	209	209
Little Kingshill Combined School	C	Primary	923,044	954,974	3%	0	0	211	211
Steeple Claydon School	C	Primary	779,811	821,976	5%	0	0	166	166
Stoke Mandeville Combined School	C	Primary	927,228	976,167	5%	0	0	203	203
Booker Hill School	C	Primary	1,052,183	1,107,623	5%	0	0	204	204

Illustrative School Level Funding - School Name	Type	Sector	Final Budget 2022/23	2023/24 Indicative Model	Variance	MFG 2022/23	2023/24 Indicative Model	Pupil No.s October 2021 + Sept 22 Growth	Pupil No.s October 2021 + Sept 23 Growth
Ash Hill Primary School	C	Primary	1,080,328	1,139,611	5%	0	0	209	209
Little Chalfont Primary School	C	Primary	968,545	1,004,303	4%	0	0	222	222
Haydon Abbey Combined School	C	Primary	2,163,153	2,299,483	6%	0	0	473	473
Grendon Underwood Combined School	C	Primary	760,786	800,503	5%	0	0	164	164
Oakridge School	C	Primary	1,760,492	1,853,470	5%	0	0	361	361
Butlers Court Combined School	C	Primary	1,793,350	1,851,170	3%	0	0	413	413
Chartridge Combined School	C	Primary	954,327	1,004,217	5%	0	0	209	209
Juniper Hill School	C	Primary	1,803,772	1,861,152	3%	0	0	416	416
Thomas Hickman School	C	Primary	1,890,879	1,992,426	5%	0	0	402	402
Burford School	C	Primary	1,793,614	1,850,497	3%	0	0	413	413
Lane End Primary School	C	Primary	758,284	799,338	5%	0	0	135	135
Claytons Primary School	C	Primary	1,196,995	1,252,571	5%	0	0	272	272
Hughenden Primary School	C	Primary	805,739	847,663	5%	0	0	169	169
Buckingham Primary School	C	Primary	1,655,849	1,708,383	3%	0	1,415	376	376
Aston Clinton School	C	Primary	1,659,197	1,711,475	3%	0	199	380	380
Whitchurch Combined School	C	Primary	883,688	930,461	5%	0	0	200	200
Widmer End Combined School	C	Primary	958,089	1,007,952	5%	0	0	215	215
Spinfield School	C	Primary	925,228	958,317	4%	0	0	211	211
Long Crendon School	C	Primary	907,269	935,538	3%	0	0	207	207
Stokenchurch Primary School	C	Primary	1,781,426	1,837,062	3%	0	248	406	406
Ashmead Combined School	C	Primary	2,691,861	2,805,196	4%	0	0	629	629
William Harding Combined School	C	Primary	3,388,401	3,541,015	5%	0	0	780	780
Robertswood School	C	Primary	1,593,067	1,643,577	3%	0	733	364	364
Waddesdon Village Primary School	C	Primary	941,275	991,884	5%	0	0	213	213
Halton Community Combined School	C	Primary	893,627	939,308	5%	0	0	198	198
Naphill and Walters Ash School	C	Primary	1,537,978	1,586,453	3%	0	0	353	353
Holtspur School	C	Primary	1,070,451	1,121,962	5%	0	0	221	221
Highworth Combined School	C	Primary	1,869,087	1,965,444	5%	0	0	411	411
The Stoke Poges School	C	Primary	1,896,145	1,969,221	4%	0	0	435	435
Foxes Piece School	C	Primary	902,204	952,004	6%	0	0	185	185
St James & St John C of E Primary School	C	Primary	730,278	759,887	4%	8,642	0	160	160
North Marston C of E School	C	Primary	530,307	558,387	5%	0	0	98	98
St Michaels C of E Combined School	C	Primary	835,538	881,922	6%	0	0	190	190
Bierton C of E Combined School *	C	Primary	1,500,550	1,549,499	3%	0	0	351	351
High Ash C of E School	C	Primary	1,330,317	1,373,799	3%	0	56	311	311
Stone C of E Combined School	C	Primary	895,310	944,291	5%	0	0	203	203
Weston Turville C of E School	C	Primary	875,357	922,604	5%	0	0	200	200
Wingrave C of E Combined School	C	Primary	853,889	900,661	5%	0	0	196	196
Great Kingshill C of E Combined School	P(A)	Primary	1,648,946	1,702,846	3%	0	0	385	385
Longwick C of E Combined School	P(A)	Primary	852,221	898,559	5%	0	0	190	190
Monks Risborough C of E Primary School	C	Primary	927,991	977,495	5%	0	0	200	200

Illustrative School Level Funding - School Name	Type	Sector	Final Budget 2022/23	2023/24 Indicative Model	Variance	MFG 2022/23	2023/24 Indicative Model	Pupil No.s October 2021 + Sept 22 Growth	Pupil No.s October 2021 + Sept 23 Growth
St. Mary's Farnham Royal Church of England Primary School	C	Primary	1,239,390	1,309,437	6%	0	0	263	263
Newton Longville C of E Primary School	C	Primary	886,099	933,979	5%	0	0	201	201
Hawridge & Cholesbury School	C	Primary	877,615	926,300	6%	0	0	193	193
Quainton C of E Combined	C	Primary	713,017	751,836	5%	0	0	150	150
Oakley C of E Combined School	C	Primary	526,792	554,167	5%	0	0	97	97
Winslow C of E Combined School	C	Primary	1,513,930	1,596,055	5%	0	0	353	353
St Peter's C of E Combined School	C	Primary	997,216	1,054,317	6%	0	0	214	214
Cuddington & Dinton C of E School	C	Primary	787,552	828,929	5%	0	0	179	179
St Mary's C of E Primary School	C	Primary	1,389,138	1,434,828	3%	0	0	324	324
St Mary & All Saints C of E Primary School	C	Primary	1,746,765	1,803,691	3%	0	0	408	408
Cadmore End C of E Combined School	C	Primary	398,904	420,621	5%	0	0	65	65
Frieth C of E Combined School	C	Primary	595,743	627,187	5%	0	0	120	120
Hazlemere C of E Combined School	C	Primary	828,052	872,250	5%	0	0	186	186
High Wycombe C of E Combined School	C	Primary	934,509	985,189	5%	0	0	203	203
St John's C of E Combined School	P(A)	Primary	937,598	968,258	3%	0	0	219	219
St Paul's C of E Combined School	C	Primary	887,812	917,478	3%	0	0	207	207
St Peter's Catholic Primary School	P(A)	Primary	705,985	743,166	5%	0	0	148	148
St. Joseph's Catholic Primary School	P(A)	Primary	1,561,003	1,645,323	5%	0	0	364	364
Our Lady's Catholic Primary School	P(A)	Primary	966,135	1,018,268	5%	0	0	215	215
St Louis Catholic Primary School	P(A)	Primary	1,803,746	1,862,183	3%	0	0	420	420
King's Wood School	C	Primary	1,862,950	1,963,392	5%	0	0	399	399
Brookmead School	C	Primary	1,407,931	1,454,463	3%	0	610	329	329
Overstone Combined School	C	Primary	958,805	1,006,091	5%	0	0	223	223
Castlefield School	C	Primary	2,097,048	2,211,618	5%	0	0	434	434
Loudwater Combined School	C	Primary	946,409	997,645	5%	0	0	204	204
Danesfield School	C	Primary	1,828,327	1,887,898	3%	0	0	427	427
Kingsbrook Primary Academy #	P(A)	Primary	506,443	607,370	20%	0	0	96	113
Chalfont Valley E-ACT Primary Academy	P(A)	Primary	833,715	880,792	6%	0	0	165	165
Denham Green E-ACT Primary Academy	P(A)	Primary	986,190	1,042,701	6%	0	0	211	211
Lace Hill Academy	P(A)	Primary	833,500	879,147	5%	0	0	184	184
George Grenville Academy	P(A)	Primary	946,496	999,547	6%	0	0	196	196
Ivingswood Academy	P(A)	Primary	870,742	921,030	6%	0	0	154	154
Beechview School	P(A)	Primary	940,533	994,789	6%	0	0	187	187
Princes Risborough Primary Academy	P(A)	Primary	1,024,367	1,081,445	6%	0	0	230	230
Edlesborough School	P(A)	Primary	778,004	819,204	5%	0	0	172	172
West Wycombe Combined School	P(A)	Primary	488,717	515,281	5%	0	0	92	92
Dorney Academy	P(A)	Primary	843,004	890,000	6%	0	0	196	196
Green Ridge Academy #	P(A)	Primary	1,585,126	1,747,451	10%	0	0	359	377
Abbey View Academy *	P(A)	Primary	819,001	861,566	5%	0	0	170	170
Elmhurst School	P(A)	Primary	1,868,803	1,974,066	6%	0	0	400	400
Ickford Combined School	P(A)	Primary	622,073	655,177	5%	0	0	138	138

Illustrative School Level Funding - School Name	Type	Sector	Final Budget 2022/23	2023/24 Indicative Model	Variance	MFG 2022/23	2023/24 Indicative Model	Pupil No.s October 2021 + Sept 22 Growth	Pupil No.s October 2021 + Sept 23 Growth
Bedgrove Junior School	P(A)	Primary	2,058,785	2,125,985	3%	0	0	480	480
Thomas Harding Junior School	P(A)	Primary	1,063,221	1,123,647	6%	0	0	226	226
Elmtree School	P(A)	Primary	824,484	868,902	5%	0	0	160	160
Bearbrook Combined School	P(A)	Primary	1,970,809	2,079,776	6%	0	0	439	439
Lent Rise Combined School	P(A)	Primary	1,916,085	1,990,118	4%	0	0	447	447
Chepping View Primary Academy	P(A)	Primary	1,914,571	2,013,848	5%	0	0	432	432
The Bourton Meadow Academy	P(A)	Primary	2,436,352	2,516,012	3%	0	0	569	569
St Mary's C of E School	P(A)	Primary	1,889,395	1,951,415	3%	0	0	443	443
Brill C E School	P(A)	Primary	808,913	852,205	5%	0	0	186	186
Chesham Bois C of E Combined School	P(A)	Primary	915,407	960,080	5%	0	0	214	214
Great Missenden C of E Combined School	P(A)	Primary	1,856,739	1,917,499	3%	0	0	434	434
Curzon C of E Combined School	P(A)	Primary	711,470	749,803	5%	0	0	153	153
Great Kimble C of E School #	P(A)	Primary	524,218	526,562	0%	0	0	103	94
Great Horwood C of E Combined School	P(A)	Primary	441,321	463,742	5%	0	0	63	63
Chalfont St Peter Church of England Academy	P(A)	Primary	1,360,535	1,405,195	3%	0	0	319	319
Seer Green C E School	P(A)	Primary	935,410	979,436	5%	0	0	214	214
St Nicolas C of E Combined School Taplow	P(A)	Primary	958,729	1,011,386	5%	0	0	218	218
St Edward's Catholic Junior School	P(A)	Primary	1,108,901	1,168,660	5%	0	0	255	255
St Joseph's Catholic Infant School	P(A)	Primary	849,441	893,849	5%	0	0	175	175
Hamilton Academy	P(A)	Primary	2,725,533	2,874,275	5%	0	0	615	615
The Gerrards Cross C.E. School	P(A)	Primary	1,795,565	1,854,505	3%	0	0	421	421
Kingsbrook Secondary Academy (Opened Sept 22) #	S(A)	Secondary	622,225	678,086	9%	0	0	105	105
The Buckingham School #	U	Secondary	6,027,877	6,249,008	4%	0	0	1,018	1,000
The Grange School	U	Secondary	7,165,136	7,560,934	6%	0	0	1,228	1,228
Mandeville School #	S(A)	Secondary	5,942,042	6,039,459	2%	0	0	967	949
Cressex Community School	U	Secondary	4,650,053	4,912,511	6%	0	0	751	751
Saint Michael's Catholic School #	U	Secondary	10,069,199	10,016,448	-1%	0	0	1,897	1,792
The Cottesloe School	U	Secondary	5,384,800	5,679,483	5%	0	0	941	941
Chiltern Hills Academy #	S(A)	Secondary	5,658,145	5,873,975	4%	0	0	939	921
The Highcrest Academy #	S(A)	Secondary	5,503,024	5,712,956	4%	0	0	887	869
Buckinghamshire UTC	S(A)	Secondary	626,799	661,697	6%	0	0	78	78
Sir Thomas Fremantle	S(A)	Secondary	2,741,190	2,891,704	5%	0	0	464	464
Khalsa Secondary Academy	S(A)	Secondary	2,866,640	3,024,988	6%	0	0	471	471
John Hampden Grammar School	S(A)	Secondary	4,987,732	5,158,162	3%	0	0	897	897
Princes Risborough School	S(A)	Secondary	4,825,571	5,091,042	6%	0	0	817	817
Bourne End Academy	S(A)	Secondary	4,037,977	4,266,474	6%	0	0	643	643
The Misbourne School	S(A)	Secondary	5,139,811	5,420,421	5%	0	0	890	890
John Colet School	S(A)	Secondary	5,432,184	5,728,413	5%	0	0	973	973
Burnham Grammar School	S(A)	Secondary	5,002,860	5,180,331	4%	0	6,282	901	901
Aylesbury High School	S(A)	Secondary	5,045,780	5,218,110	3%	0	0	907	907
Dr. Challoner's High School	S(A)	Secondary	5,058,030	5,230,930	3%	0	0	910	910

Illustrative School Level Funding - School Name	Type	Sector	Final Budget 2022/23	2023/24 Indicative Model	Variance	MFG 2022/23	2023/24 Indicative Model	Pupil No.s October 2021 + Sept 22 Growth	Pupil No.s October 2021 + Sept 23 Growth
Sir Henry Floyd Grammar School	S(A)	Secondary	5,094,050	5,269,230	3%	0	0	922	922
Holmer Green Senior School *	S(A)	Secondary	5,610,407	5,922,241	6%	0	0	985	985
Chesham Grammar School	S(A)	Secondary	5,068,925	5,241,255	3%	0	0	907	907
The Beaconsfield School	S(A)	Secondary	4,403,696	4,650,427	6%	0	0	740	740
Sir William Ramsay School	S(A)	Secondary	5,682,473	5,999,157	6%	0	0	928	928
Amersham School #	S(A)	Secondary	5,114,945	5,303,000	4%	0	0	889	871
Aylesbury Grammar School	S(A)	Secondary	5,202,262	5,379,912	3%	0	0	935	935
The Royal Latin School	S(A)	Secondary	4,821,619	4,985,969	3%	0	0	865	865
Wycombe High School	S(A)	Secondary	5,237,700	5,417,820	3%	0	0	948	948
Dr Challoner's Grammar School	S(A)	Secondary	5,108,846	5,283,266	3%	0	0	918	918
Sir William Borlase's Grammar	S(A)	Secondary	3,989,050	4,126,230	3%	0	0	722	722
Beaconsfield High School	S(A)	Secondary	4,979,408	5,149,648	3%	0	0	896	896
Chalfonts Community College	S(A)	Secondary	6,939,836	7,332,188	6%	0	0	1,191	1,191
Royal Grammar School	S(A)	Secondary	5,596,825	5,789,295	3%	0	0	1,013	1,013
Waddesdon Church of England School	S(A)	Secondary	4,037,403	4,256,052	5%	0	0	714	714
Great Marlow School	S(A)	Secondary	6,604,854	6,969,091	6%	0	0	1,154	1,154
The Aylesbury Vale Academy	S(A)	Secondary	9,261,824	9,776,220	6%	0	0	1,645	1,645
INFANT SCHOOLS	I		28,624,788	29,983,952	5%	13,516	5,118	5,658	5,641
JUNIOR SCHOOL	J		18,170,704	18,952,714	4%	49,286	37,992	4,092	4,092
COMBINED SCHOOLS	C		95,798,295	100,197,645	5%	8,642	3,274	21,254	21,254
PRIMARY ACADEMIES	P(A)		55,581,044	58,365,093	5%	0	0	12,321	12,347
PRIMARY TOTAL			198,174,831	207,499,403	5%	71,443	46,384	43,325	43,333
UPPER SCHOOLS	U		33,297,064	34,418,384	3%	0	0	5,835	5,712
ACADEMIES	S(A)		156,244,134	163,027,751	4%	0	6,282	27,219	27,149
SECONDARY SCHOOLS			189,541,198	197,446,134	4%	0	6,282	33,054	32,861
ALL SCHOOLS			387,716,029	404,945,537	4%	71,443	52,666	76,378	76,194

4	12
0	0

Growth Funding

As in the previous year growth funding is now included in the formula for those schools where growth has been agreed - please note growth in September 2022 is not included in the 2023/24 indicative model above

* These schools are currently in receipt of growth funding and are proposed to continue in September 23 at the same level

These schools maybe currently in receipt of growth funding but the level is proposed to change in September 23

Due to the fact September 22 growth is not included in the indicative pupils column where a schools growth numbers are changing the change can appear unusual.

Estimated Use of Growth Fund						
2022/2023				Estimated		
DfES No.	School Name	Type	Sector	Additional Reception Pupils	Additional Yr7 Pupils	Total Additional Funding NFF
Expansion of Existing Schools						
8253022	Bierton Church of England Combined School	C	Primary	20	0	49,758
8252022	Dagnall School	C	Primary	15	0	33,558
8252027	Denham Village School	C	Primary	15	0	34,527
8253039	Great Kimble C of E School	P(A)	Primary	15	0	24,038
8253057	Maids Moreton Church of England School	C	Primary	15	0	32,590
8254095	Amersham School	S(A)	Secondary	0	30	93,659
8254004	The Buckingham School	U	Secondary	0	30	94,969
8254000	Chiltern Hills Academy	S(A)	Secondary	0	30	99,350
8254001	The Highcrest Academy	S(A)	Secondary	0	30	101,944
8254070	Holmer Green Senior School	S(A)	Secondary	0	60	187,458
8254067	Mandeville School	S(A)	Secondary	0	30	98,418
8254701	Saint Michael's Catholic School	U	Secondary	0	180	566,768
Expansion of Existing Schools Through the Schools Funding Formula - Sub-Total				80	390	1,417,036
New & Growing Schools						
8252042	Abbey View Academy	P(A)	Primary	30	0	68,842
8252050	Kingsbrook Primary Academy	P(A)	Primary	30	0	72,928
8250123	Kingsbrook Secondary Academy	S(A)	Secondary	0	180	622,225
New & Growing Schools Through the Schools Funding Formula - Sub-Total				60	180	763,995
Projects/Contingencies Outside the Schools Funding Formula						
	Primary (Expected Increase in Demand)		Primary	50	0	90,440
	Green Ridge (Bulge Class)		Primary	30	0	71,187
	Kingsbrook Primary (Bulge Class)		Primary	30	0	72,928
	Denham Green (Bulge Class)		Primary	30	0	71,045
	Bourne End (Bulge Class)		Secondary	0	30	102,178
	Princes Risborough (Bulge Class)		Secondary	0	30	97,056
	Cottesloe (Bulge Class)		Secondary	0	20	62,219
	Kingsbrook Primary Academy - Diseconomies (Est.)		Primary	0	0	26,000
	Kingsbrook Secondary Academy - Start up		Secondary	0	0	89,333
	Growth Fund Contingency					878,529
Expansion Sub-Total				0	80	1,255,315
Grand Total				140	650	3,436,346

Growth Funding 2,372,935
Underspend 2021/22 1,680,541
Un-Allocated Schools Block -617,130
Total Funding Available 3,436,346

2023/2024				Estimated		
DfES No.	School Name	Type	Sector	Additional Reception Pupils	Additional Yr7 Pupils	Total Additional Funding NFF
Expansion of Existing Schools						
8253022	Bierton Church of England Combined School	C	Primary	20	0	47,616
8253057	Maids Moreton Church of England School	C	Primary	15	0	34,327
8252039	Green Ridge Primary School	P(A)	Primary	30	0	75,102
8254070	Holmer Green Senior School	S(A)	Secondary	0	60	197,891
Expansion of Existing Schools Through the Schools Funding Formula - Sub-Total				65	60	354,936
New & Growing Schools						
8252042	Abbey View Academy	P(A)	Primary	30	0	72,524
8252050	Kingsbrook Primary Academy	P(A)	Primary	60	0	147,339
8250124	Kingsbrook Secondary Academy	S(A)	Secondary	0	180	678,086
New & Growing Schools Through the Schools Funding Formula - Sub-Total				90	180	897,948
Projects/Contingencies Outside the Schools Funding Formula						
	Primary (Expected Increase in Demand)		Primary	90	0	217,446
	Secondary (Expected Increase in Demand)		Secondary	0	140	461,746
	Growth Fund Contingency					2,021,324
Project/Contingencies Outside the Schools Funding Formula Sub-Total				90	140	2,700,517
Grand Total				245	380	3,953,401

Growth Funding (Est) 3,275,670
Potential Carry Forward 878,529
Un-Allocated Schools Block -200,798
Potential Budget 3,953,401

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Appendix 5				
Central Schools Service Block Budgets	2022-23	2023-24	2024-25	2025-26
<u>Ongoing Central Functions</u>				
Ex Education Services Grant	1,178,000	1,178,000	1,178,000	1178000
DfE Licenses (DSG) increase by 2.5% each year	459,582	471,071	482,848	494,919
Admissions	901,798	919,194	936,934	955,017
BASL and TSAN	35,000	35,000	35,000	35,000
Schools Forum	9,000	9,000	9,000	9,000
Safeguarding in Ed. Project Team/Advisory Service	210,000	210,000	210,000	210,000
2020 to 2021 Teachers' pension employer contributions funding for centrally employed teachers	240,603	240,603	240,603	240,603
Central Overheads	-	-	-	-
Contribution from Historic Commitments	- 81,583	-	-	-
Total Projected Spend	2,952,399	3,062,868	3,092,385	3,122,538
Estimated Funding Allocation	- 2,912,448	- 2,980,959	- 2,906,435	- 2,833,774
Savings Required - Ongoing Commitments	39,951	81,908	185,949	288,764
Historic Commitments				
Contribution to Combined Budgets (ex BLT)	1,596,765	1,516,265	1,466,265	1,516,265
Contribution to On-Going Central Services	81,583	-	-	-
Prevention Contracts	151,250	-	-	-
Schools Premature Retirement Costs (PRC)	272,000	272,000	272,000	272,000
Use of 2021-22 underspend	- 110,000			
Use of Reserve to profile savings	351,500	48,000	- 399,500	
Total Projected Spend	2,343,098	1,836,265	1,338,765	1,788,265
Estimated Funding Allocation	- 2,382,848	- 1,906,279	- 1,525,023	- 1,220,019
Savings Required - Historic Commitments	- 39,750	- 70,014	- 186,258	568,246
Total Central Schools Services Projected Spend	5,295,497	4,899,133	4,431,150	4,910,803
Estimated Funding Allocation	- 5,295,296	- 4,887,238	- 4,431,459	- 4,053,793
CSSB Total gap in Funding	201	11,894	- 309	857,010

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Report to Schools Forum

Date: 6th December 2022

Title: De-Delegation Proposals 2023-24

Author: Liz Williams, Head of Finance – Children’s Services

Recommendations:

To consider and agree the proposals for de-delegation in 2023-24 based on the recommendations of the Maintained Schools Committee.

Reason for decision: to set de-delegation levels for 2023-24.

1. Purpose of Report

- 1.1. The purpose of this report is to set out the proposals for existing de-delegations and former ESG funded services de-delegations 2023-24 for consideration by Schools Forum. The DfE Operational Guide published in July 2022 makes no changes to the De-delegation definition or guidance. The guidance includes provision to allow the de-delegation of funds to support core and additional school improvement activity.
- 1.2. The Maintained Schools Committee met on 16th November 2022 with an open invitation to representatives from maintained schools.

2. Maintained Schools Committee

- 2.1. The committee met on 16th November 2022. The notes of that meeting are attached to this report.
- 2.2. Supplementary information was provided to the committee including expenditure in previous years and a further update on the trade union facilities costs. All of this information was taken into account in the discussions in the group.
- 2.3. A separate report on proposals for the de-delegation of funding for school improvement activity was also presented to the meeting. This report is included as

a separate agenda item for this Schools Forum meeting and the recommendations of the Maintained Schools Committee are included here.

2.4. Based on the information presented at the meeting, the committee made the following recommendations.

3. “Existing” De-delegated Services

3.1. It is recommended that de-delegation for “existing” de-delegated services across primary and secondary schools should be as follows:

- Contingency fund for schools in deficit - It is recommended that there is no de-delegation in 2023-24 due to the amount that has been rolled forward from previous years. This is to be reviewed on an annual basis.
- Contingency for deficits of closing schools – it is recommended that there is no de-delegation in 2023-24 and that this should be reviewed on an annual basis.
- Trade union facilities – It is recommended that there is no de-delegation in 2023-24 due to the amount that has been rolled forward from previous years. This is to be reviewed on an annual basis.
- Supply cover for small schools – it is recommended that there is no de-delegation in 2023-24 and that this should be reviewed on an annual basis. This is due to the amounts rolled forward from previous years.

4. Former ESG funded Services

4.1. It is recommended that de-delegation for former ESG funded services is as follows:

- Finance support for schools in financial difficulties – £2.75 per pupil primary and secondary/ £10 per place Special and PRU
- Educational Visits Service - £1 per pupil for primary and secondary/ £4 per pupil Special and PRU

5. School Improvement Activity

5.1. It is recommended that de-delegation for school improvement activity is £2.40 per pupil for 2023-24.

6. Recommended De-Delegation 2023-24

6.1. The total recommended de-delegation for 2023-24 is summarised as follows:

Service	Primary/Secondary per pupil (£)	Special School per Place (£)
Contingency Fund for schools in deficit	-	-
Contingency for deficits of closing schools	-	-
Trade Union Facilities	-	-
Supply cover for small schools	-	-
Finance Support for schools in financial difficulties	2.75	10.00
Educational Visits Service	1.00	4.00
School Improvement	2.40	-
Total proposed de-delegation per pupil/place	6.15	14.00

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Notes of the Maintained Schools Committee

Date: 16th November 2022

Present: J Freeman (Chair) - Kings Wood School, K Shabbier – Cressex School, E Stewart – Stoke Mandeville Combined School, J Antrobus – Newtown School, P Ayres – Chestnut Lane School, N Alexandre – Chartridge School, G Bull – Haddenham St Mary’s School, M Harris – Stonydean School, N Strain – Stonydean School, M Williams – Vale Federation, J Carson – Ley Hill School, L Edlin – Buckinghamshire Primary PRU, S Crombie – Ashmead School, M Pickover – Ashmead School, J Robertson – Brushwood Junior School, G Hargreaves – Burford School, D Evans – Farnham Common School, E Williams – Head of Finance (Children’s Services), G Drawmer – Head of Achievement and Learning, M Harwin – Outdoor Education Adviser.

1. De-delegation to fund School Improvement Activities

- 1.1. The committee considered proposals for the de-delegation of funding from maintained schools to cover School Improvement activities following the cessation of the School Improvement Monitoring and Brokerage Grant from April 2023.
- 1.2. The report identified core school improvement activities that had previously been funded from the grant.
- 1.3. 3 options were considered:

Option One	<ul style="list-style-type: none"> • Full de-delegation for Side by Side to start from FY2023/24 at a rate of £16.01 per pupil. • Reserved School Improvement Monitoring and Brokerage Grant monies to be re-allocated to other school improvement activities/projects • Schools Forum to be consulted with regards to school improvement priorities for maintained schools.
Option Two	<ul style="list-style-type: none"> • De-delegation is phased in between FY2023/24 and FY2028/29 with year 1 de-delegation proposed at £2.40 per pupil. • Reserved grant monies are wound down over the same period to supplement the school improvement funding to support maintained schools to the forecast annual spend.

Option Three	<ul style="list-style-type: none"> • Reserved grant funding is used exclusively to support Side by Side school improvement until it is exhausted (current forecast to be during FY2025/26). • Full de-delegation for Side by Side from this time onwards.
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- 1.4. It was noted that Schools Forum can only agree de-delegation for one year and therefore any decision would need to be brought back on an annual basis.
- 1.5. It was agreed to recommend the option to de-delegate £2.40 per pupil in 2023-24 without committing to the amounts for future years given in the option appraisal. The Committee requested further discussion with schools prior to any decision for 2024-25.

2. Contingency Fund

- 2.1. The committee reviewed the sums carried forward from 2021-22 and the budget available for the current year against levels of spend in previous years.
- 2.2. It was agreed that there should be no further de-delegation from schools for the contingency fund in 2023-24 as there is sufficient funding available to cover future bids against this fund.
- 2.3. It was agreed this should be reviewed on an annual basis to ensure that a level of funding is retained to support schools in deficit.

3. Contingency – deficits for closing schools

- 3.1. It was agreed that, based on the potential conversions in the next financial year, there should be no de-delegation of funds for deficits in closing schools in 2022-23. It was agreed that this should be reviewed on an annual basis based on risk.

4. Trade Union Facilities

- 4.1. The committee reviewed the sums carried forward from 2021-22 and the budget available for the current year against levels of spend in the current and previous years.
- 4.2. The committee also considered a more detailed report detailing the purpose and utilisation of TU facilities funds.
- 4.3. It was agreed that there should be no further de-delegation from schools for TU facilities in 2023-24 as there is sufficient funding available to cover drawdowns.
- 4.4. It was agreed that the committee recognised the need to continue to ensure that there is funding to enable backfill for TU reps and that the de-delegation should be reviewed every year.

5. Cover for small schools

- 5.1. Expenditure in previous years was reviewed and it was agreed to recommend to Schools Forum that no funding is de-delegated in 2023-24 as funding will be rolled forward from previous years. This is to be reviewed on an annual basis.

6. Finance Support for Schools in Financial Difficulties

- 6.1. It was agreed to recommend de-delegation at £2.75 per pupil in mainstream schools and £10 per place for special schools and PRUs. This is in line with 2022-23 de-delegation levels.

7. Educational Visits

- 7.1. It was agreed to recommend that de-delegation for the Educational Visits Service remain at the same rates as 2022-23 (£1 per pupil for primary and secondary/ £4 per pupil Special and PRU).
- 7.2. Whilst the number of maintained schools will decrease in 2022-23 the service has a high level of buy back from academies and therefore it was considered that the level of de-delegation could remain the same. This is to be reviewed in future years due to the need to meet increases in staffing costs within the service.

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Report to Schools Forum

Date: 6th December 2022

Contact Gareth Drawmer, Head of Achievement and Learning

Proposed De-delegation for School Improvement

Recommendation

To agree the proposed de-delegation for School Improvement activity at a rate of £2.40 per pupil in 2023-23

1. Background

Since 2017, the Local Authority School Improvement Monitoring and Brokering grant has been allocated to local authorities to support them in fulfilling their statutory school improvement functions and their school improvement expectations as set out in the Schools Causing Concern (SCC) guidance which require councils to monitor performance of maintained schools, broker school improvement provision, and intervene as appropriate. This grant has been used since 2017 to fund the Side by Side Offer to Buckinghamshire schools.

Since 2017 councils have also been permitted, with the agreement of their local schools forum, to de-delegate funding from their schools' budget shares, to fund the provision of additional school improvement services. These are activities that go above and beyond their core school improvement activities, and may include, for example, providing or funding access to school improvement support. Buckinghamshire Council has not, as yet, requested to de-delegate funding for these additional services as it has funded both core and additional activities from the School Improvement Monitoring and Brokerage Grant.

Following the [Reforming how local authorities' school improvement functions are funded](#) consultation in January 2022, the DfE announced the reduction the grant by 50% for the FY 2022/23 and that the grant would end in FY 2023/24.

Buckinghamshire Council have built up a reserve of the School Improvement Monitoring and Brokerage grant over FY2020/21 and FY 2021/22 where Side by Side support for schools was restricted due to the pandemic (see **Appendix 1**). It is forecast that the reserves will be £1,466,065 at the end of this financial year and that, at proposed spending rates, this reserve will be spent before the end of FY2025/26.

To fund both all school improvement activities, both core and additional, the government included provision in Part 7 of Schedule 2 to the [School and Early Years Finance \(England\) Regulations for FY 2022-23](#) which allows councils to de-delegate for all improvement expenditure. Buckinghamshire Council propose a phased introduction of de-delegation for both core and additional school improvement activities from FY2023/24.

In line with the announcement on the cessation of the grant funding, a charge for Side by Side support for academy schools was introduced at 50% of direct costs in FY2022-23 and 100% of costs in FY2023-24 onwards. De-delegation for additional school improvement activities would support maintained schools only; academies wishing to ‘buy in’ to the services would be required to purchase at a traded rate.

School Improvement team capacity

The size of the School Improvement team has increased over academic year 2021/22, resulting in a increase in capacity from one Advisor per 118 schools to one Advisor per 58.8 schools.

September 2021 - the School Improvement and Traded Delivery Team in schools was as follows:	
1 x School Improvement & Traded Delivery Manager	Total number of Schools in Buckinghamshire 236
2 x FTE School Advisers	118 schools per Adviser
September 2022 - the School Improvement and Traded Delivery Team in schools is now as follows:	
1 x School Improvement & Traded Delivery Manager	Total number of Schools in Buckinghamshire 237 (Kingsbrook Academy opened September 2022)
4 x FTE School Advisers	58.8 schools per Adviser
0.4 x School Adviser	

2. School Improvement Support for maintained schools

1. Core School Improvement Support:
 - a. This is delivered through Side by Side and includes:
 - 3 Headline Visits and up to 9 days of funded SSPC/ABLE support for Prevention schools,
 - 5 Headline Visits, up to 18 days of funded SSPC/ABLE support and up to 18 days of funded SSLC support for Intervention schools (inclusive of HLVs),
 - A Headline Visit to every maintained enhancement school every year.
2. Additional School Improvement Support:
 - a. **The Buckinghamshire Challenge Programme.** In partnership with the Education Endowment Foundation’s Unity Research School, the Buckinghamshire Challenge Board deliver an exciting and innovative programme of support to enable schools across Buckinghamshire to raise the achievement and attainment of disadvantaged pupils.

The aim of the Buckinghamshire Challenge is for all participating schools to have robust strategies for addressing disadvantage, specifically:

- to understand the impact of educational disadvantage on their own pupils,
 - to understand how to best address long term disadvantage and the challenge of the pandemic on pupil attainment in their own schools,
 - to build a long term, sustainable, schools-led source of knowledge, experience and application in raising attainment for disadvantaged pupils in Buckinghamshire.
- b. **Liaison Group Projects** - Funding for liaison groups to research and develop robust strategic for addressing disadvantage in their own local areas
- c. **Side by Side Conference Programme** - The School Improvement Team will develop and administer a comprehensive annual conference programme. The programme will be tailored to the needs of Headteachers and senior leaders in Buckinghamshire and cover the most pressing strategic issues.
- d. **STEPs Champion Network for primary schools** - STEP is a training programme to support schools in developing whole school positive behaviour strategies and practices for early intervention, and to safely manage complex or challenging behaviour within their own setting.
- For School Improvement activities for maintained schools that will continue to be funded from base budget and traded income, please see **Appendix 2**.

3. Cost of Core Side by Side Support per year for Maintained Schools

a. SSLC, SSPC and Headline Visit costs for intervention and prevention schools

	Intervention	Prevention	TOTAL
Cost per School	£15,300	£4,650	
Estimated Number of Maintained Schools	20	20	
Side by Side Cost for Maintained Schools	£306,000	£93,000	£399,000
Enhancement Visit Costs (based on 94 visit)			£ 47,000
TOTAL FOR MAINTAINED SCHOOLS			£446,000

b. Additional Side by Side projects costs per year

Project	Annual Cost
The Buckinghamshire Challenge Project	£20,000
Liaison Group Projects	£70,000

Side by Side Conference Programme	£ 5,000
STEPs Behaviour Management Training	£25,000
TOTAL	£120,000
<i>Assuming 50% engagement by academies funding 20% of the cost</i>	-£24,000
TOTAL FOR MAINTAINED SCHOOLS	£96,000

c. Total core and additional Side by Side school improvement costs

Support for maintained schools	Annual Cost
Side by Side brokerage costs for intervention and prevention schools	£446,000
Additional projects	£ 96,000
TOTAL	£542,000
Per pupil cost	£16.01 per annum

- If funding from school improvement is drawn only from the reserves, the reserves would be completed before the end of FY2025/26 (see Appendix 1).

4. Phased Introduction of de-delegation for Maintained Schools

- Buckinghamshire Council appreciate the high additional cost to maintained schools of this service that has previously been funded through government grants. De-delegation could therefore be introduced gradually over the course of 6 years, using the grant reserves to support the school improvement work for maintained schools.

	% cont.	£ contribution	£ reserves	Per pupil costs
FY 2023/24	15%	£ 81,300	£460,700	£2.40
FY 2024/25	25%	£135,500	£406,500	£4.00
FY 2025/26	45%	£243,900	£298,100	£7.20
FY 2026/27	65%	£352,300	£189,700	£10.41
FY 2027/28	80%	£433,600	£108,400	£12.81
FY 2028/29	100%	£542,000		£16.01

5. Options

- Buckinghamshire Council propose three options for discussion:

Option One	<ul style="list-style-type: none"> • Full de-delegation for Side by Side to start from FY2023/24. • Reserved School Improvement Monitoring and Brokerage Grant monies to be re-allocated to other school improvement activities/projects • Schools Forum to be consulted with regards to school improvement priorities for maintained schools.
Option Two	<ul style="list-style-type: none"> • De-delegation is phased in between FY2023/24 and FY2028/29 (as per point 4 above). • Reserved grant monies are wound down over the same period to supplement the school improvement funding to support maintained schools to the forecast annual spend.
Option Three	<ul style="list-style-type: none"> • Reserved grant funding is used exclusively to support Side by Side school improvement until it is exhausted (current forecast to be during FY2025/26 – see Appendix 1, point 6). • Full de-delegation for Side by Side from this time onwards.

6. Assumptions

- The above calculations demonstrate the principle of the proposed de-delegation.
- Forecast spend on Side by Side costs vary each year based on a number of different factors including number of schools requiring support as determined by risk assessment and the number of support days used by each supported school etc.
- The numbers will need to be recalculated each year to take into account:
 - the actual spend in the previous year,
 - the number of academisations per year, and therefore the number of remaining maintained schools in Buckinghamshire,
 - the School Improvement costs associated with the number of remaining maintained schools.
- Should the spend in any one year be below forecast, Buckinghamshire Council propose to adjust the de-delegation amount in the following year. If there is an overspend, due to an increased number of schools requiring support, then the overspend will be funded from the reserves, which will therefore be spent faster.
- This model is based on the current School Improvement Strategy which delivers improvement through Side by Side deployments. Changes to the School Improvement model may need to be made to take into account evolving strategic direction, the national landscape and changing local needs.

- De-delegation cannot be made for maintained special schools or nurseries.

Appendix 1

1. Current Number of Intervention and Prevention Schools – Academy v Maintained

	Intervention	Prevention	TOTAL
Maintained	15 (54%)	15 (65%)	30
Academy	13 (46%)	8 (35%)	21
TOTAL	28	23	51

2. Number of maintained schools

Primary	135
Secondary	5
Cross-Phase	4 (1 mainstream, 3 special)
TOTAL	144

- For forward planning, the number of maintained schools has been set at 134 which takes into account the 10 schools currently academising.
- In pupil numbers this is **33,856 maintained, mainstream pupils**.

3. Current Reserves

Current School Improvement Monitoring and Brokerage Grant Reserves	£2,005,800
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4. End of Financial Year 2022/23 – Forecast Spend

Forecast spend Side by Side FY2022/23	£839,418
Additional grant income (May, Sept & Nov)	-£299,683
Draw-down from reserves	£539,735

5. Reserves remaining at the end of this financial year

Current School Improvement Monitoring and Brokerage Grant Reserves	£2,005,800
Draw down from reserves	-£539,735
TOTAL RESERVES end of FY2022/23	£1,466,065

No inflation increase included

6. Life of reserves if used exclusively to cover costs of School Improvement Support for Maintained Schools.

Reserves at end of FY2023/24	£924,065
Reserves at end of FY2024/25	£382,065
Reserves at end of FY2025/26	-£159,935

Appendix 2

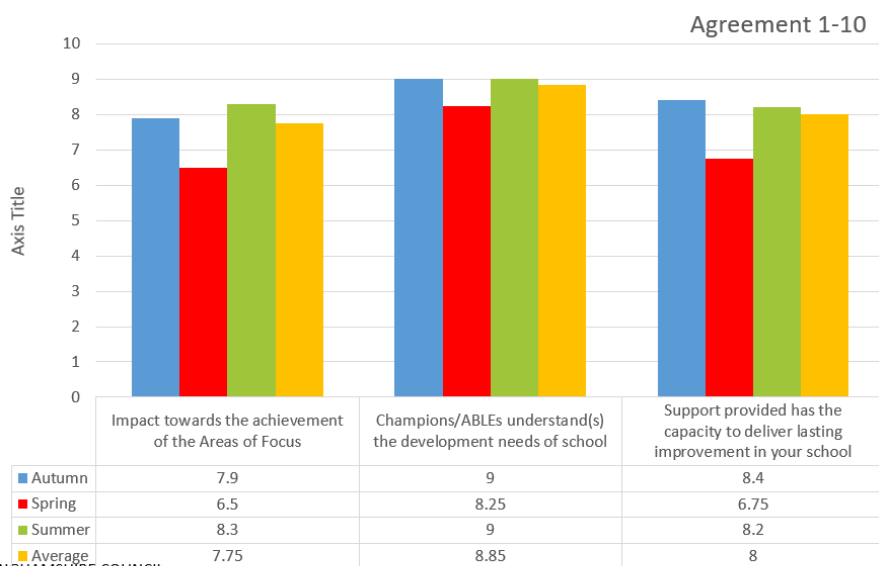
School Improvement programme of support for maintained schools to be funding from base budget and traded income:

1. **Additional 'New to Headship' Headline Visit** - Recognising the challenges for new Headteachers and the importance of enhanced support during a Headteacher's first year in post, a New to Headship Headline Visit will also be offered to all maintained schools with either:
 - A 'new to post Headteacher' for academic year 2022/23 (including those headteachers moving from an interim position to a permanent post);
 - A 'new to Buckinghamshire Headteacher' for academic year 2022/23.
2. **An 'Early Career Headship' programme** for the cohort of new Headteachers.
3. **Team Around the School Support** - In order to support schools during a challenging period, Team Around the School support is offered to all maintained schools facing a significant need. Team Around the School meetings are convened by the School Improvement Team, who build a strong team from within the local authority to support a school undergoing a particularly difficult set of circumstances. Formal meetings are held at regular intervals (monthly or half termly) and all are held to account for the quality and pace of the improvements by the Chair, who will normally be a senior member of the Education Team.
4. **Rapid Improvement Group meetings** - These can be convened by the School Improvement Team with the purpose to regularly monitor impact of intervention support with the supported school's Headteacher, Chair of Governors, the SSLC. This will be chaired by the School Improvement Advisor.
5. **Support during Ofsted Inspections** - All maintained schools also benefit from support during Ofsted inspections, and attendance from a member of the School Improvement Team at Ofsted inspection feedback sessions. The School Improvement Advisor will support the process through a pre-inspection discussion with the Headteacher, availability for telephone support throughout the inspection period and a discussion with the Lead Inspector on day two, regarding supported development work.
6. **Attendance at one day of interviews for Headteacher Interview** - School Improvement Advisors will support the recruitment process for a new Headteacher in maintained schools by attending the final interviews and representing the local authority as part of the interview panel.

Appendix 3 – Impact of Side by Side

Impact of Side by Side on Ofsted Judgements – Ac. Year 2021/22 and 2022/23 to date

- During academic year 2021/22 - 19 intervention or prevention schools had an Ofsted inspection. These schools were classified as either significantly or moderately 'at risk' of a requires improvement or inadequate judgement at their next inspection
 - Three of the inspected schools increased their judgement from requires improvement to good - all three schools had strong engagement with the Side by Side process.
 - Of the intervention and prevention schools who were deemed to have strong engagement in the Side by Side process, just under 65% either retained their good judgement, despite significant issues at the school, or increased their judgement to become good.
 - Of the five schools with strong engagement who did not obtain a good judgement, the majority had experienced significant leadership disruption and issues in the months prior to the inspection. Although the overall effectiveness judgement did not achieve good, each of the five schools achieved a good or better judgement in at least two of the inspection elements, with two school achieving good in four of the elements. Safeguarding was a limiting judgement in one of the schools who had brokered an independent safeguarding review. Side by Side work continues with these schools.
 - Of the two schools with amber engagement levels, both schools saw their judgements decline.
 - Of the three schools with no Side by Side engagement, one retained their judgement and two schools saw their judgements decline.
- Of the two Intervention and Prevention schools with strong Side by Side engagement and have been inspected so far during academic year 2022/23:
 - One has moved from requires improvement to good.
 - One has retained a good judgement.
- **Perception of Impact of Side by Side – Supported School Leadership**
 - The perceived impact of Side by Side from Supported School Leaders is assessed termly and feedback remains extremely positive.





Report to Schools Forum

Date: 6th December 2022

Title: DSG Management Plan – Report from the DSG Spending Review Group

Author: Liz Williams, Head of Finance – Children’s Services

Recommendations:

To note the priorities and work of the DSG Expenditure Review Group since the last Schools Forum meeting

1. Purpose of the Report

1.1. The purpose of this report is to update on the work of the DSG Spending Review Group through the autumn term.

2. Updates from the DSG Expenditure Review Group

2.1. At the meetings in the autumn term the group has considered highlight reports and progress against the key workstreams in the DSG recovery plan:

- 1) Post-16 and Post-19 demand and spend
- 2) Expenditure on placements in other local authority schools
- 3) Expenditure in Independent schools
- 4) EHCP Demand Management
- 5) Sufficiency Strategy – capital spend
- 6) Mainstream School Top Up spend

2.2. Progress against some of these workstreams is well developed and others, for example post-16 and post-19 spend, will be the subject of further detailed actions to understand spend and demand and to develop further proposals.

2.3. The October meeting of the DSG Expenditure Review Group focused on updating the work on the Post-16 workstream, and on initial progress and priorities of the new SEND Inclusion Advisers. SEND Inclusion Advisers will work collaboratively

across the county, sharing appropriate information as required, to support schools and ensure that the needs of pupils are met. The aim is for 100% of schools to have been met by SEND Inclusion Advisers (virtually or face to face) by the summer term 2023.

- 2.4. Expected outcomes of the work of these new posts were discussed. Financial impact measures will be developed to support the deficit management plan.
- 2.5. Through the spring term the DSG Expenditure Review Group will consider the financial modelling of the DSG deficit management plan, to be reported back to Schools Forum at the March 2023 meeting.



Report to Schools Forum

Date: 6th December 2022

Title: Proposal to apply for a Disapplication of the Minimum Funding Guarantee for Special Schools 2023-24

Author and contact officer: Liz Williams, Head of Finance (Children's Services)

Schools affected: All Special Schools

Recommendations:

Schools Forum is asked to agree to apply for a disapplication to the special school Minimum Funding Guarantee (MFG) for 2023-24

Reason for decision: to enable the third year of the agreed transitional arrangements for the implementation of a needs led funding mechanism for special schools.

1. Background

1.1. A report was considered by the Buckinghamshire Schools Forum on 30th June 2020 confirming the outcomes of the consultation on the allocation of top-up funding to support pupils with Education, Health and Care Plans (EHCPs) and the implementation of a needs led funding system based on an adapted model for Buckinghamshire which was agreed by Cabinet Member decision on 17th June 2020. Implementation of the new funding model across all types of provision is to be phased with initial implementation in special schools from the 2021-22 financial year.

1.2. On 8th December 2020 Schools Forum agreed:

- a) The proposed values for each of the bands for the funding model.
- b) The proposed transitional arrangements enabling increases and reductions in funding for special schools to be managed in order to enable reductions to be managed over time.

- c) To apply for an exemption from the Special School MFG in order for reductions in funding to be applied in line with the transitional model.
- 1.3. Applications for exemption from the special school MFG have been approved by the Department for Education (DfE) and implemented for the 2021-22 and 2022-23 financial years. Any approval to disapply the special school MFG is for one year only and therefore it is necessary to apply for each year of the transitional period.

2. The Current Funding Model

- 2.1. The High Needs Operational Guide 2023 to 2024 states that *“top-up funding is the funding required over and above the core funding an institution receives to enable a pupil or student with high needs to participate in education and learning”*.
- 2.2. As detailed above, the current funding model for special schools is to use a banded approach to the allocation of top up values based on a needs-led assessment of pupils against the bands. The application of the bands is moderated on an annual basis and a financial value is ascribed to each band to allocate top up funding to schools. The current agreed values of the bands for 2023-24 are as follows:

	Band 1	Band 2	Band 3	Band 4	Band 5	Exceptional
Standard Values agreed by Schools Forum	£	£	£	£	£	£
Non Fringe	-	5,995	9,992	19,983	29,975	59,949
Fringe	-	6,100	10,166	20,333	30,499	60,998

- 2.3. These will be reviewed as part of the budget setting process in January once the final value of the high needs block is confirmed.

3. Transitional Arrangements

- 3.1. As a result of the change to a needs led funding system, special schools are experiencing changes to their funding. In order to manage these changes a transitional approach was agreed by Schools Forum so that reductions or increases are phased over a period of time.
- 3.2. The principles to be applied to the transitional arrangements were agreed as follows:
- 1) Gaining schools need to move as quickly as possible to the new model to ensure they are appropriately funded for the needs of pupils in the school;
 - 2) Schools facing a reduction in funding will have a longer transition period in order to manage reductions, with less disruption to staffing and provision.
- 3.3. The agreed model is as follows:

Change	Transition yrs
Increase	3
Decrease under 500k	3
Decrease 500k-1m	5
Decrease 1m+	10

3.4. The application of the transitional arrangements is through adjustment of the top up values to enable transition towards the agreed values. The transition and the calculation of top up values is based on the initial modelling for 2020-21 comparing the outcome of the banding process to the funding for the same pupils in the 2019-20 financial year. This modelling looked at the cash gains or reductions based on like for like pupil numbers as a result of implementing the model.

3.5. Those schools that will gain funding under the model have their top up values increased over 3 years to reach the published values and those schools that have a reduction in funding will see top up values reduce over the transitional period towards the published values. Those adjusted top up values are then applied to the actual pupil numbers and bands for each year.

3.6. 2023-24 is the 3rd year of implementation and therefore the majority of schools will be moving to the published band values from April 2023. The agreed transitional period for Chiltern Way Academy is 10 years and therefore top up values will reduce over a longer period of time.

4. Minimum Funding Guarantee (MFG) for Special Schools

4.1. The MFG protection for maintained special schools and special academies in 2023 to 2024 will be set by a condition of grant that applies to local authorities' dedicated schools grant (DSG) and protects schools from seeing a reduction in funding from year to year, assuming that the number and type of places remains the same. In 2023 to 2024, the MFG for special schools/academies will be set at 3% of their core budget (place + top-up funding) on a per pupil basis compared with a 2021-22 baseline.

4.2. Where the MFG is breached and the local authority intends to fund one or more schools below the guaranteed level, the authority must request that the relevant condition of grant is disapplied. Any decision is for one year only and therefore a new request must be made each year.

4.3. In order to implement the 3rd year of transition to the agreed needs led funding system it will be necessary to apply for an exemption from the MFG for the following schools:

- Pebble Brook

- Heritage House
- Westfield
- Chiltern Way Academy

4.4. Without an exemption to the MFG it will not be possible to reduce funding to any school and therefore the transitional arrangements supporting the move to a needs led funding system cannot be implemented. Schools Forum is asked to agree that a request should be made to disapply the MFG for special schools in 2023-24 to enable the second year of transition towards the new bands to be implemented. For Pebble Brook, Heritage House and Westfield schools this will be the final year that an exemption will be required.



Report to Schools Forum

Date: 6th December 2022

Title: Terms of Reference for the Schools Specific Contingency Fund

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

Recommendations:

Schools Forum is asked to:

- a) **Confirm the membership and Chair of the Schools Specific Contingency Panel.**
- b) **Approve the proposed changes to the Terms of Reference for implementation in the 2022-23 financial year.**

1. Purpose of the Report

1.1. The purpose of the report is to

- a) Confirm the membership and chair of the Schools Specific Contingency Panel;
- b) Propose amendments to the terms of reference for the Schools Specific Contingency Fund prior to inviting applications for 2022-23 bids to the fund.

2. Membership of the Panel

2.1. The terms of reference for the contingency panel require at least 3 members of the Schools Forum to be members of the panel, supported by the Head of Finance for Children's Services. It is proposed that the terms of reference should be amended to clarify that members should be maintained school representatives as only maintained mainstream schools can apply for contingency funds.

2.2. Schools Forum is asked to confirm the membership of the Schools Specific Contingency Panel for 2022-23 and to elect a chair for the group.

3. Schools Specific Contingency Fund Terms of Reference

- 3.1. Schools will be invited to apply for contingency funding during January 2023 prior to the meeting of the panel in February/March (date to be agreed). Bids will only be considered if they meet the criteria set out in the terms of reference.
- 3.2. It is recognised that schools are facing additional cost pressures in this financial year specifically related to increases in energy costs. In order to reflect this, whilst still managing the volume and value of applications to the fund, it is proposed that for any applications relating to unforeseen increases in energy costs the criteria for a school being considered as in “financial difficulties” will be revised so that only schools with an overall deficit can apply for support. This change will only apply for applications relating to energy costs.
- 3.3. Appendix 1 to this report shows the proposed revisions.

SCHOOL SPECIFIC CONTINGENCY FUND TERMS OF REFERENCE

Approved by Schools Forum: 22nd March 2022

Effective: 1st April 2022

Background

The Schools Budget consists of the delegated budgets allocated to individual schools and a budget for other provision for pupils which local authorities fund centrally. The allocation to each school is made according to formulae, either set nationally or agreed on a local basis.

In Buckinghamshire, a contingency fund has been established, in accordance with current regulations¹, to assist maintained schools where, for a range of potential reasons they are experiencing financial difficulty to a degree likely to impact adversely on the education of pupils. This fund is known as the Schools Specific Contingency Fund (SSCF). The SSCF is a de-delegated service. Funding for de-delegated services must be allocated through the formula but can be passed back, or 'de-delegated', for maintained mainstream primary and secondary schools with Schools Forum approval. De-delegation is not an option for Special schools, Nursery schools and PRUs. Primary and secondary maintained school members of the Schools Forum can vote to approve a local authority proposal to pool funding from maintained school budgets.

Any unspent balance at the year-end should be reported to Schools Forum. Funding may be carried forward to the following year and can be used specifically for de-delegated service if the authority wishes. If a local authority carries forward an overspend, then the Schools Forum must specifically agree for it to be funded from the following year's budget.

The SSCF is central expenditure deducted for the purpose of ensuring that monies are available to enable increases in a school's budget share after it has been allocated where it subsequently becomes apparent that a governing body have incurred expenditure which it would be unreasonable to expect them to meet from the school's budget share which may include expenditure in relation to -

- (i) schools in financial difficulty,
- (ii) the writing-off of deficits of schools which are discontinued, excluding any additional costs and overheads,
- (iii) new, amalgamating or closing schools, or
- (iv) other expenditure where such circumstances were unforeseen when initially determining the school's budget share

Regulations¹ give the Schools Forum members for Primary maintained schools and Secondary maintained schools the power to agree the level of the Schools Specific Contingency.

The Schools Specific Contingency Group (SSCG)

The Schools Specific Contingency Group has delegated authority from the Executive Director of Children's Services and the Schools Forum to make allocations of funding to schools from the Schools Specific Contingency Fund.

SCHOOL SPECIFIC CONTINGENCY FUND

TERMS OF REFERENCE

Approved by Schools Forum: 22nd March 2022

Effective: 1st April 2022

Membership of the group shall include:

Head of Finance Children's Services or representative

And

At least three **maintained school** Members of the Schools Forum

The group has the authority to determine appropriate criteria for the allocation of contingency funding to schools; such criteria may need to change from time to time to reflect available funding and the number and nature of applications from schools.

The SSCG will meet once a year, in late February/March, when all cases submitted by schools will be considered. Meetings will be chaired by a Schools Forum member.

In order to avoid any conflict of interest that might exist for a member of the Group in the consideration of a specific application with which he/she may have a connection as a Governor, IEB member, Headteacher or Business Manager, then such a conflict will be eliminated by such a member withdrawing from the discussions and decision making surrounding the case.

Principles and criteria

Schools are expected to take all reasonable issues into account when setting their financial plans and to ensure that they have capacity within their plans to deal with unforeseen eventualities. The Schools Specific Contingency Fund is necessarily very limited and is therefore allocated only in exceptional circumstances.

Please note that unforeseen additional expenditure or loss of income attributable to the COVID-19 pandemic will not be eligible for support through the SSCF.

Please note that for applications for unforeseen costs associated with increases in energy costs in 2022-23 will only be considered if the school is forecasting an overall deficit for the year end.

In considering applications for support except those relating to errors in budget shares, in all cases the school is required to demonstrate that "financial difficulty"* would result. The SSCG will require evidence of the size and nature of the expenditure together with an explanation of steps taken to mitigate the impact on the school's budget. The group will take account of such steps and in cases where the expenditure could have been avoided or substantially reduced (e.g. through the purchase of appropriate insurance) applications will be discounted accordingly.

* Financial difficulties shall be recognised when either

- a) The latest forecast of the year end results show a deficit or
- b) As a result of the additional costs (being the subject of the Contingency application), the in-year deficit of the school exceeds 2% of the school's Budget share

Note that an exception to this will be applied in the case of any applications associated with increases in energy costs in 2022-23. For these costs a school will be considered in financial difficulty **only** if the first of these criteria is met.

SCHOOL SPECIFIC CONTINGENCY FUND

TERMS OF REFERENCE

Approved by Schools Forum: 22nd March 2022

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Applications will be considered for the issues arising in the academic years covered by the current financial year. However, funding is only available on a financial year basis and therefore schools should ensure that applications are made within the correct financial year. **Consideration of applications will be limited by the level of the budget set aside for the SSCF.**

Where allocations are agreed, the following criteria will generally be applied;

- (i) Support for significant unforeseen costs incurred up to the date of the SSCG meeting – no more than 50% of the cost accepted by the SSCG. (NB schools may apply for support to meet costs incurred in the remainder of the financial year after the date of the SSCG meeting in the following year if the school still meets the overall criteria for financial difficulty)

The following are examples of applications falling under point (i) above – unforeseen costs – which the SSCG may consider:-

- a) Long term absence of teaching staff through sickness/maternity leave etc. where it has proved necessary to engage agency staff. This may include HLTA absence if that absence requires cover to be provided by a supply teacher. (N.B. the SSCG will require valid reasons if no insurance has been arranged either for teachers or for HLTA staff if they are being deployed in a teaching role)
 - b) Net redundancy costs² for staff declared redundant in the first 9 months of the financial year. Redundancies arising in the last 3 months of the financial year will only be considered in exceptional circumstances.
 - c) Child Protection issues resulting in staff suspensions and/or legal costs.
 - d) Significant and unbudgeted increases in energy costs (for 2022-23 financial year only). SSCG will require evidence that the school is forecast to be in deficit at the end of the financial year and that the school has taken steps in year to mitigate the impact of these costs, including reducing expenditure elsewhere.
- (ii) Support for additional pupil numbers
In cases where schools experience or need to plan for, a known (not forecasted) significant rise in pupil numbers since the date of the previous funding census (October) until the start of the financial year when those pupils begin to be funded through the funding model, they may apply for additional funding to cover costs incurred in providing education to those pupils. Each case will be considered on an individual spend or need to spend basis.

Schools need to demonstrate:

- a) That necessary additional staffing costs have been incurred or need to be incurred,
- b) That financial difficulty will arise without additional funding i.e. that insufficient free reserve and balances are available to cover those costs. "Free reserves refer to such reserves held by a school which are not specifically held for some future defined expenditure."

SCHOOL SPECIFIC CONTINGENCY FUND

TERMS OF REFERENCE

Approved by Schools Forum: 22nd March 2022

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- c) Marginal non-staffing costs will be expected to be met by the schools themselves, but significant non-staffing costs will be considered provided that there is clear evidence to prove the cost would not have been incurred if the pupil numbers had not risen.

Contingency panel will grant the actual amount that the school can justify it has incurred due to the increase in pupils up to a maximum of 7/12 AWPU

(iii) Traveller Children

For Traveller children who do not receive pupil premium an amount equal to Pupil Premium shall be paid for the period at which the child is registered at that school. Claims should be made in arrears.

Applications which fall outside the scope of the Contingency Fund which will not be accepted and for clarity include those:-

- (i) for funding appertaining to prior financial years
- (ii) for capital expenditure
- (iii) from academies
- (iv) for circumstances which fall under the criteria of the growth fund, i.e. pupil growth beyond PAN to meet basic need
- (v) for SEN funding
- (vi) for funding that is attributable to the COVID-19 pandemic

Application Process

Schools that believe their budget share is incorrect should contact the Schools Funding and Support Team to verify the calculations. Any errors established will be corrected as a matter of course and will be reported to the SSCG.

Additional information or evidence may be included in covering letters etc. to support the school's application.

The application must be supported by an up-to-date forecast of the school's projected year end income & expenditure and resulting surplus/deficit (such forecasts to be provided by utilising the standard financial reporting process), Updated for 4 weeks before the panel meeting. The date of the meeting will be announced on the SchoolsWeb.

Notification of Decisions

The BC Finance team will notify Schools of the decision on their contingency applications within 15 working days of the SSCG meeting.

Appeals

SCHOOL SPECIFIC CONTINGENCY FUND

TERMS OF REFERENCE

Approved by Schools Forum: 22nd March 2022

Effective: 1st April 2022

Schools wishing to appeal against the decision made on their application should put the details of their appeal in writing enclosing all additional and supporting information within 5 working days of the decision and submit using the Schools Contingency Fund Request Form on the Service Desk Portal. Any appeals will be heard and considered by the SSCG at a special meeting.

(Amended by Schools Forum 8th December 2020)

Note ¹: THE SCHOOL AND EARLY YEARS FINANCE (ENGLAND) REGULATIONS 2021

Note ²: Net redundancy costs to be calculated as the costs of the redundancy less the amount 'saved' in salaries, including on-costs, for the balance of the financial year. (Schools should be aware however that the SSCF would only cover up to 50% of the net redundancy costs)

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