



WOKINGHAM BOROUGH COUNCIL

A Meeting of the **SCHOOLS FORUM** will be held at the Civic Offices, Shute End, Wokingham RG40 1BN on **WEDNESDAY 22 FEBRUARY 2017 AT 9.30 AM**

A handwritten signature in black ink, appearing to read 'Andy Couldrick', written in a cursive style.

Andy Couldrick
Chief Executive
Published on 16 February 2017

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WOKINGHAM BOROUGH COUNCIL

Our Vision

A great place to live, an even better place to do business

Our Priorities

Improve educational attainment and focus on every child achieving their potential

Invest in regenerating towns and villages, support social and economic prosperity, whilst encouraging business growth

Ensure strong sustainable communities that are vibrant and supported by well designed development

Tackle traffic congestion in specific areas of the Borough

Improve the customer experience when accessing Council services

The Underpinning Principles

Offer excellent value for your Council Tax

Provide affordable homes

Look after the vulnerable

Improve health, wellbeing and quality of life

Maintain and improve the waste collection, recycling and fuel efficiency

Deliver quality in all that we do

MEMBERSHIP OF THE SCHOOLS FORUM

Schools Representatives

Paul Miller	Governor - St Crispins - Chairman
John Bayes	Governor - Foundry College - Vice-Chair
Ian Head	Governor - Aldryngton Primary
Helen Ball	Primary Head - Polehampton Infant
Ali Brown	Primary Head - Nine Mile Ride Primary
Sally Hunter	Primary Head - Wescott Infant
Brian Prebble	Primary Head - Rivermead Primary
Elaine Stewart	Primary Head - Aldryngton Primary
Mandy Turner	Primary Head - Shinfield Infant
Sylvia Allen	School Business Manager - Hawkedon Primary
Julia Mead	School Business Manager - St Sebastian's CE Primary
Carol Simpson	School Business Manager - Colleton Primary
Ginny Rhodes	Secondary Head - St Crispins
Derren Gray	Academy Headteacher - The Piggott School
Janet Perry	Academy Business Manager - The Holt School
Mary Davies	Academy Headteacher - Maiden Erlegh
Corrina Gillard	Headteacher - Emmbrook Infant School
Kerrie Clifford	Maintained Nursery Acting Headteacher
Jay Blundell	Special School Headteacher - Foundry College
Sara Attra	Special School Head - Addington School

Non School Representatives

Anne Andrews	Oxford Diocese
Vacancy	Roman Catholic Diocese
Richard Dolinski	Wokingham Borough Council Representative
James Taylor	Wokingham and Bracknell College
Mary Parker	Early Years Representative
Gail Prewett	Early Years Representative

Observers

Funding Reform Team	Education Funding Agency, Maintained Schools Division
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From the Primary Representatives only 10 votes are allowed.

From the Secondary Representatives only 2 votes are allowed.

From the Academy Representatives only 5 votes are allowed.

From the Special School Representatives only 1 vote is allowed.

From the Early Years only 1 vote is allowed.

From the Pupil Referral Unit only 1 vote is allowed.

ITEM NO.	WARD	SUBJECT	PAGE NO.
23		APOLOGIES To receive any apologies for absence.	
24		MINUTES OF PREVIOUS MEETING To confirm the Minutes of the Meeting held on 18 January 2017.	5 - 12

24.1	Clarifications requested at the previous meeting	Verbal Report
25	DECLARATION OF INTEREST To receive any declarations of interest.	
26	BUDGET MONITORING To receive and consider a report containing details of the schools current financial position.	13 - 22
27	SEN ALERT To receive and consider a report outlining the current financial position in relation to the Special Educational Needs provision.	23 - 24
28	APPRENTICESHIP LEVY To consider a report giving details of the impact on schools and the methodology of implementation.	25 - 36
29	REVIEW OF SCHOOLS FORUM MEMBERSHIP To receive and consider a report a report reviewing the Schools Forum membership arrangements.	37 - 42
30	FORWARD PROGRAMME To consider the Forum's work programme for the remainder of the academic year.	43 - 44

Any other items which the Chairman decides are urgent

A Supplementary Agenda will be issued by the Chief Executive if there are any other items to consider under this heading.

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**MINUTES OF A MEETING OF THE
SCHOOLS FORUM
HELD ON 18 JANUARY 2017 FROM 9.30 AM TO 12.30 PM**

Schools Representatives

Helen Ball	Primary Head - Polehampton Infant
Ali Brown	Primary Head - Nine Mile Ride Primary
Sally Hunter	Primary Head - Wescott Infant
Brian Prebble	Primary Head - Rivermead Primary
Sylvia Allen	School Business Manager - Hawkedon Primary
Julia Mead	School Business Manager - St Sebastian's CE Primary
Carol Simpson	School Business Manager - Colleton Primary
Sara Attra	Special School Head - Addington School
Ginny Rhodes	Secondary Head - St Crispins
Derren Gray	Academy Headteacher - The Piggott School
Janet Perry	Academy Business Manager - The Holt School
Corrina Gillard	Headteacher - Emmbrook Infant School
Kerrie Clifford	Maintained Nursery Acting Headteacher
Jay Blundell	Special School Headteacher - Foundry College
Paul Miller	Governor - St Crispins - Chairman

Non School Representatives

Anne Andrews	Oxford Diocese
Richard Dolinski	Wokingham Borough Council Representative
James Taylor	Wokingham and Bracknell College
Mary Parker	Early Years Representative
Gail Prewett	Early Years Representative

Also Present

Hawa Bedwa, Interim Schools Finance Manager
Madeleine Shopland, Principal Democratic Services Officer
Alan Stubbersfield, Interim Head of Learning and Achievement
Katherine Vernon, Accountancy Assistant

17 APOLOGIES

Apologies for absence were submitted from John Bayes, Mary Davies, Ian Head, John Ogden, Maggie Segrove, Elaine Stewart and Mandy Turner.

18 MINUTES OF PREVIOUS MEETING

The Minutes of the meeting of the Committee held on 14 December 2016 were confirmed as a correct record and signed by the Chairman subject to the removal of the words 'and individual schools' (item 12).

18.1 Clarifications on questions arising at the last meeting

Alan Stubbersfield, Interim Head of Learning and Achievement took the Forum through a report regarding 2017-18 Financial Pressures arising from Education Services Grant removal, produced in response to questions raised at the December Forum meeting.

During the discussion of this item the following points were made:

- In December, the Forum had considered a report about the removal of the Education Services Grant (ESG) from local authorities with effect from April 2017.

The report had also proposed stratagems to address this shortfall, including staff reductions in Learning & Achievement amounting to £279,000. The Forum had requested the production of a business plan outlining the budgetary position if the Forum agreed or disagreed to the proposals, what the services were and a judgement as to whether services were needed or could be cut.

- Alan Stubbersfield emphasised that further staffing reductions to the Learning and Achievement team to those already proposed would present insuperable service delivery problems, such that it was hard to envisage viable services being maintained.
- The funding to be withdrawn from 2017-18 was the £1.806m ESG. However the Retained Duties element of the ESG of £15 per pupil was to be rebased into the Central Services Block of the Dedicated Schools Grant (DSG). In response to a question it was clarified that this would be calculated as a lump sum.
- It was anticipated that £373,000 would be available for retained and statutory duties, such as internal audit, for all schools.
- The regulations regarding and the approach taken towards school improvement had been amended and it was possible for maintained schools to de-delegate this. However, the Council was not proposing its de-delegation.
- National consultation had taken place on Early Years funding, with proposals for a new formula and a reduction of the top-slicing option available to local authorities, but not previously taken in Wokingham Borough Council. The top-slice was to be limited to 7% for 2017-18 and thereafter 5%. The proposal for Wokingham Borough Council was a top-slice of £370,000, amounting to approximately 4.08%.
- Gail Prewett questioned whether the 30 hours allocation had been included in the calculation. Alan Stubbersfield indicated that it had not. From September some Early Years setting may see a reduction.
- Derren Gray asked that it be clarified what services maintained schools received from Early Years that academies did not.

19 DECLARATION OF INTEREST

There were no declarations of interest submitted.

20 FINANCIAL PRESSURES ARISING FROM EDUCATION SERVICES GRANT REMOVAL

The Forum received a report regarding the financial pressures from Education Services Grant removal.

Discussion of this item took place during discussion of item 12.1 Clarification on questions arising at the last meeting.

RESOLVED: That the Schools Forum supports proposals for a shared solution to the funding shortfall, including agreement to:

- i) Top-slice the Early Years Block as proposed by the Government's Early Years Consultation in September 2016;
- ii) Confirm the 100% de-delegation of the retained duties element of the Education Services Grant that has been re-based into the DSG Central Schools Block to continue delivering the Local Authority's Statutory Education duties as set out in Annex B of the DfE's National Funding Formula consultation in March 2016.

21 REVENUE MONITORING

The Forum considered the revenue monitoring report regarding Budget Monitoring Period 7 2016/17 which provided an update of the 2016/17 financial position. Appendix B referred to within the report was circulated at the meeting.

During the discussion of this item the following points were made:

- The net overall year end surplus was still forecasted to be £552,000.
- Further detail was provided on Wokingham schools predicted surplus/deficit 2016/17, projected outturn carry forward from 2016/17 compared to the final carry forward from 2015/16 and movement from September 2015 forecast to final outturn 2015/16. The position for 2016/17 was more positive than that forecast in September 2016.
- It was noted that £340,000 had been identified for the October forecast for school specific contingencies. Forum members questioned whether this had been allocated and if so to what. Hawa Bedwa clarified that £230,000 had been allocated against five different activities, including a £120,000 internal recharge in contingencies for Foundry College. Forum members questioned whether this was historic or recurring. It was agreed that it would be helpful to receive a written breakdown of the contingency costs to better understand the actual spend on contingencies.
- Hawa Bedwa informed the Forum that how contingency was spent would be reported on going forwards.
- The Forum was informed that the Finance team would be undertaking a detailed analysis for all costs for 2018/19.

RESOLVED: That

- 1) the report be noted;
- 2) schools continue to work with the Council's Finance Team to ensure a clear understanding of the 16/17 financial position and ensure that any emerging deficits are addressed in an appropriate manner.

22 FINAL PROFORMA SUBMISSION

The consideration of the final Proforma for submission to the Department of Education took place as part of the discussion of item 20 'indicative budgets sent out to schools' and the final Proforma submission figures circulated at the meeting.

23 DEDICATED SCHOOLS GRANT STRATEGY

The Forum considered the Dedicated Schools Grant Strategy.

During the discussion of the item the following points were made:

- The Forum was reminded that from 2017/18 the Education Services Grant would be reallocated to the Dedicated Schools Grant. The Forum was asked to agree to top-slice the Early Years Block to help provide retained services. The proposed top-slice figures and percentages detailed within the report were updated.
- It was noted that all reference to 'Statutory and Regulatory' duties should read 'Retained duties.'
- 2016/17 figures had been included against all Centrally Retained Dedicated Schools Grant proposals for clarification.

- Recommendations 3 and 12b) were removed.
- The Forum was recommended to agree to allocate £304,000 to the School Admissions Service in 2017/18, an increase on previous years. This increase was due to the reapportioning of miscellaneous items.
- The Forum was recommended to agree to allocate £1,300,000 for the Pupil Growth/Infant Class size fund for 2017/18 as per 2016/17. Forum members queried the likely spend in this area for the financial year. An update on pupil growth at Bohunt School, including published admission number and the impact on other secondary schools and their budgets, was requested and would be incorporated into 2018/19 analyses underway.
- The de-delegation of redundancy costs was discussed. It was explained that this would be a new cost to schools. £30,000 would be allocated as per the previous year. Alan Stubbersfield emphasised that should this function not be de-delegated redundancy costs would need to be found from the schools' individual budgets.
- Janet Perry questioned what the situation would be should redundancy costs for maintained schools exceed £30,000 if the de-delegation of redundancy costs were agreed. Alan Stubbersfield indicated that there would be an overspend. Officers were asked to ascertain if there been an overspend against redundancy costs that year.
- Forum members were of the view that £30,000 once divided between all schools would not provide significant provision for individual school's redundancy costs.
- Forum members requested a report for its next meeting explaining the process of the Apprenticeship Levy. Hawa Bedwa indicated that calculations had been made for each school which would be circulated to the individual schools.

RESOLVED: That

- 1) Schools Forum agree the top-slice of £370,000 in 2017/18;
- 2) Schools Forum agree to transfer of the ESG settlement for £373,000 from the DSG to contribute towards funding the shortfall for the ESG removal and note the proposed use for the funds as detailed within the report;
- 3) Schools Forum agree to allocate £1,300,000 for the Pupil Growth/Infant Class Size Fund for 2017-18;
- 4) Schools Forum agree to allocate £4,000 for the costs associated with the Forum for 2017-18;
- 5) Schools Forum agree to allocate £304,000 to the School Admissions Service in 2017-18;
- 6) Schools Forum agree to allocate £265,000 for Support Costs in 2017-18;
- 7) maintained school members agree to de-delegation of School Specific contingencies for 2017-18;
- 8) maintained school members agreed to de-delegation of Insurance for 2017-18;
- 9) maintained school members agreed to de-delegation of Licences and subscriptions for 2017-18;

- 10 a) Members representing primary maintained schools agree to de-delegate Support to Underperforming Ethnic Minority Groups for 2017-18;
- 10b) Members representing secondary maintained schools agree to de-delegate Support to Underperforming Ethnic Minority Groups for 2017-18;
- 11) Members representing primary maintained schools agree to de-delegate a Contingency for Behaviour Support Services for 2017-18;
- 12a) Members representing primary maintained schools agree to de-delegate funding for Trade Union facilities time for 2017-18;
- 12b) Members representing secondary maintained schools agree to de-delegate funding for Trade Union facilities time for 2017-18.

24 DRAFT 2017/18 BUDGET WITH INDICATIVES

The Forum considered the draft 2017/18 budget with indicatives.

RESOLVED: That the Draft Budget 2017/18 as set out in the report be agreed.

25 DE-DELEGATION REPORT

The Forum received the de-delegation report. The report explained the regulations around de-delegation. Forum members had previously queried whether smaller primary schools in particular would be negatively impacted by de-delegating certain areas.

The Forum noted which services might be de-delegated including contingencies, insurance, licences/subscriptions, staff costs supply cover, support to underperforming ethnic minority groups and bilingual learners and behaviour support services.

Hawa Bedwa explained that an analysis of fixed and variable costings had been undertaken as per the Forum action point but most of the de-delegated items did not vary therefore cost changes were very small and the frequency for recalculations made the implementation unviable. Also current de-delegation items were based on delegations to all schools for £39,000 in 2013/14 therefore there would be no negative impact to smaller schools and the requested £33,000 was value for money as resulting savings to schools.

Janet Perry raised the possible implications of the national fairer funding review. Officers indicated that this would be considered.

RESOLVED: That the services listed within the report be de-delegated for 2017/18.

26 INDICATIVE BUDGETS SENT OUT TO SCHOOLS

The Forum considered the indicative budget sent out to Schools.

During the discussion of this item the following points were made:

- Janet Perry commented that the budget would have an impact on maintained primary schools and questioned whether the Age-Weighted Pupil Unit (AWPU) figures remained the same. She was informed that they did.
- In response to a question as to why consultation had not been carried out, Hawa Bedwa indicated that consultation on this matter was not a legal requirement and had not been carried out due to limited resources.

- Derren Gray stated that the budget was built on the 1:1:27 ratio and that the national ratio had now changed, the mean being 1:1:29 and the median 1:1:30. It was felt that schools needed stability moving forwards and now was not a suitable time to change the ratio. Consideration would be given to changing the ratio for the 2018/19 budget.
- Forum members questioned whether there was a cap applied to the budget. It was noted that caps had been removed in 2014.

RESOLVED: That the Local Authority Funding Reform Proforma 2017-18 set out in the report be agreed and submitted to the Department of Education.

27 EXPENDITURE ON EDUCATION OUT OF SCHOOL / INDEPENDENT AND SPECIAL SCHOOLS

The Forum considered a report regarding expenditure on education out of school, independent and special schools.

During the discussion of this item the following points were made:

- Following a previous request from the Forum, Officers clarified the sequence of events which had led to the current identified over commitment in the High Needs Block. This had arisen from independent special school placements.
- The report identified report trends over the last three years in Independent Special School placements. A decrease in the number of placements in 2015-16 had disguised the impact of an increase in average unit cost. An increase in the number of places in 2016-17 coupled with those costs had had a major impact on this year's commitments.
- Hawa Bedwa explained that £6.1m had been projected for the High Needs Block allocations for the 2017/18 budget. The proposed budget for this area at the start of the year had been £5.2m based on the number of placements. However, the number of placements had since increased from 109 to 111. In addition there had also been recategorisation of some individual children's needs.
- The Forum was informed that the actual spend for this area was likely to be £6.4m by the end of the financial year although it was hoped that this could be reduced to £6.1m.
- In response to concerns from the Forum, Hawa Bedwa commented that the original projection of £5.2m had been conservative.
- In response to a question Alan Stubbersfield indicated that the number of children and young people with high level needs was likely to increase. However, a number of those currently in placements were due to leave over the next few years.
- Ginny Rhodes questioned how the High Needs block was funded. Alan Stubbersfield commented that it was originally funded by census and would now be funded by precedent going forwards.
- Additional information regarding the SEN process, current placements and the projected number of children placed 2017/18, 2018/19 and 2019/20 was circulated at the meeting. The Chairman thanked Officers for the detailed information provided.
- Jay Blundell questioned the inclusion of Just Around the Corner as a placement provider as it was not a Department of Education registered provider. Officers were asked to clarify this issue.
- Jay Blundell expressed concern that there was an apparent reduction in allocation on the PRU line of the High Needs Block funding of £10,000. She commented that Foundry College should have 47 places but currently had 55 and that need for the

provision offered was increasing. Officers indicated that a detailed analysis would be undertaken of the cost centres relevant to Foundry College.

- The Forum questioned how the decision was taken over where a child was placed. Officers were asked to clarify this process. The Forum noted that the cost of a placement at St Joseph's for one child with severe learning difficulties was £255,000. The Forum was advised that higher cost placements tended to be residential. Placement availability and parental preference were also factors in where a child was placed. Officers would be undertaking a further collaborating exercise for High Needs Block pressures with neighbouring Councils to ensure value for money was being achieved for the identified current average cost per placement. If possible joint efforts to achieve benefits through economies of scale would be implemented.
- Helen Ball questioned whether there was sufficient support within the legal team to manage SEN tribunals and was informed that there was.
- With regards to SEN transport Gail Prewett questioned whether there were any instances where transport was funded and families also received Disability Living Allowance to cover transport costs. Officers were asked to clarify this issue.
- The Chairman questioned what would happen should a SEN Tribunal decision be made and sufficient funds be unavailable and was informed that a conversation would need to be had with the Council's Chief Finance Officer and the Department for Education.

RESOLVED: That the report be noted.

28 FORWARD PROGRAMME

The Forum considered and noted the Forward Programme.

Various clarifications had been requested throughout the meeting, to be reported back at the Forum meeting on 22 February.

The Chairman informed the Forum that it would be required to review its membership and constitution in future.

Derren Gray indicated that the Charvil Piggott School would host the Schools Forum meeting on 29 March 2017 9.30am.

RESOLVED: That the Forward Programme be noted.

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Budget Monitoring Period 9 2016/17

.01 Purpose of the Report

To provide the Schools Forum with an update of the projected 2016/17 financial position. The report's objective is to help Forum to understand the financial pressures which are currently being faced, and explore how they may be mitigated.

.02 Suggested Action

The Forum is asked to note the contents of this report and work with Finance colleagues to ensure a clear understanding of the likely 2016/17 outturn.

.03 Background

This report provides an update of the anticipated financial outturn for 2016/17, taking into account revised estimates from all schools.

The paper examines the rolled up position (budget, YTD actuals and projected full-year position) as currently reported in the Council's financial reporting system WiSER.

.04 Financial Summary

The current projection for this financial year is as follows:

Summarised Financial Position	s251 Budget 2016/17	Actuals Dec 2016	Forecasted position at March 2017	Variance Budget v Forecast
Expenditure	£000	£000	£000	£000
ISB and PVI allocations	111,817	110,144	112,879	1,062
Central Expenditure	13,696	9,006	14,907	1,211
Total Schools Budget	125,513	117,950	127,786	2,273
Funding				
Dedicated Schools Grant	(116,820)	(76,786)	(117,809)	(989)
DSG Other	(56)	(1,384)	(2,203)	(2,147)
EFA	(8,324)	(5,245)	(6,156)	2,168
In year adjustments b/fwd to 2016/17	0		(1,081)	(1,081)
Total Funding	(125,200)	(83,415)	(127,249)	(2,049)
Total in-year (surplus)/ deficit	313	34,535	537	224
Brought Forward (surplus) /Deficit balance	(1,151)	(2,177)	(1,096)	55
TOTAL YEAR-END (SURPLUS)/DEFICIT	(838)	32,358	(559)	279
Underlying (surplus) / deficit	(838)			

Key points to note are:

- 1) Schools Block and Early Years Contingencies :
Budget and actual spent to be presented and discussed treatment of actions
- 2) Growth Spend Analysis
Detailed information is provided in Appendix B.
- 3) December 2016 returns from schools issues:
 - a) Deadlines not met by some schools
 - b) Incomplete returns submitted
 - c) Support documents not always submitted with returns
- 4) The net overall year-end (surplus) / deficit position is now projected to be (£559k) which is an improvement on the planned (£500k) which was agreed at January Forum.

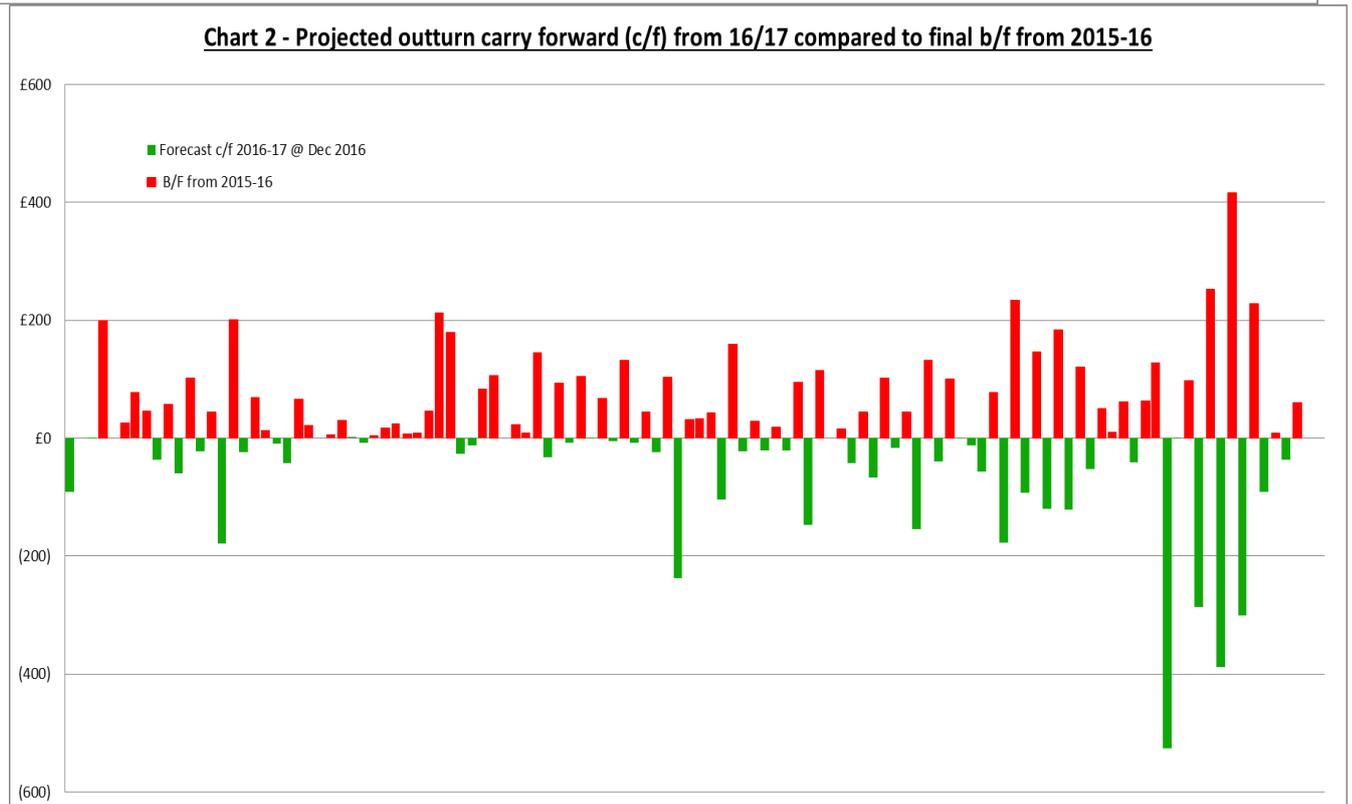
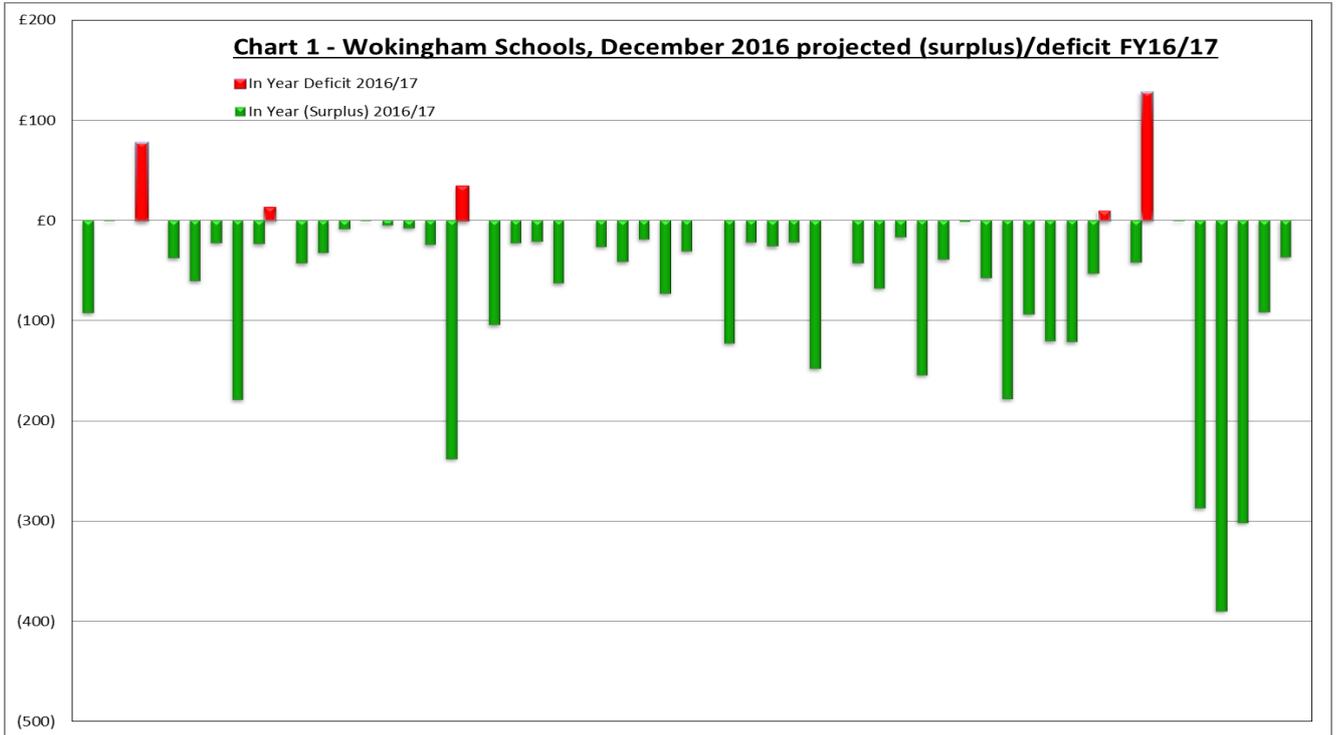
Detailed information is provided in Appendix A.

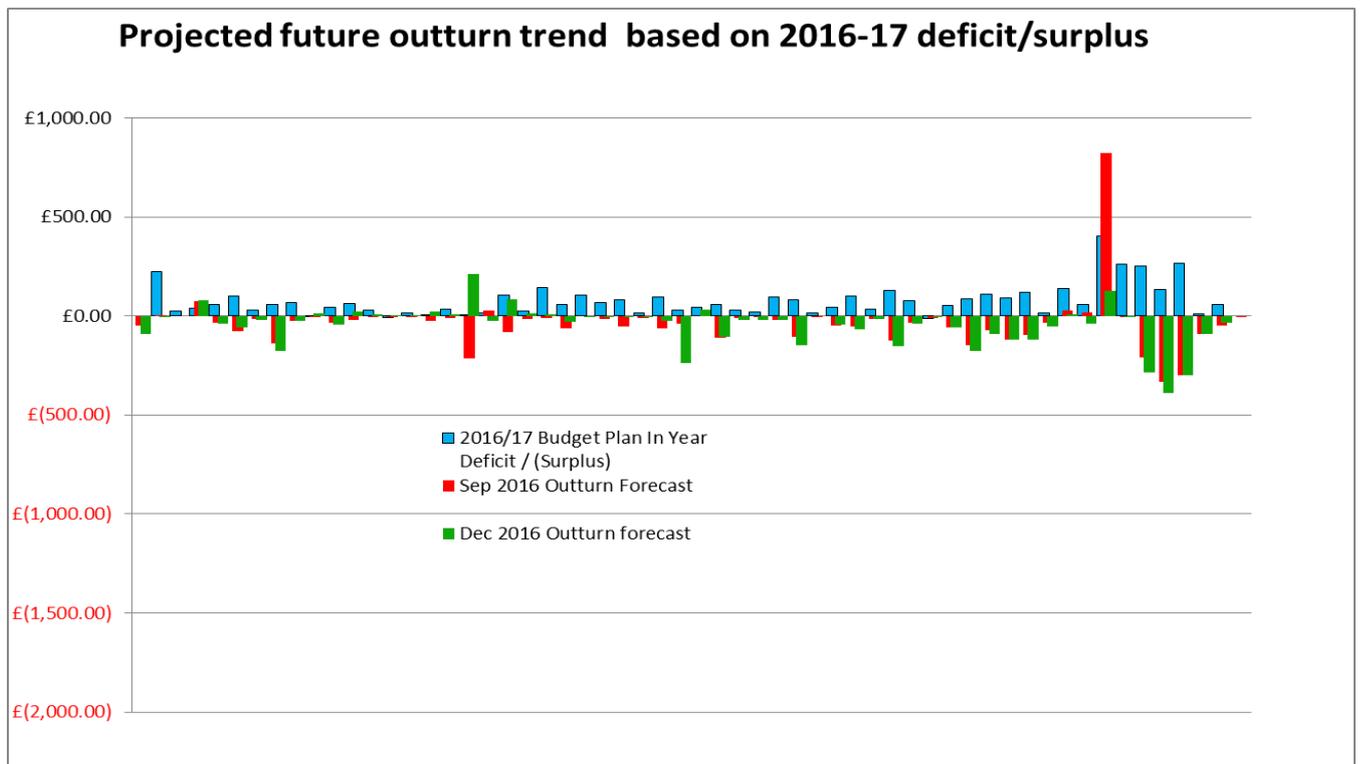
.05 Schools Position

The Schools Finance Team continues to work closely with colleagues in schools to determine the likely financial outturn for the financial year. Analyses of the combined position suggests that the vast majority of schools were facing deficits this year but are being kept afloat by carry forward balances and / or other sources of funds.

The following anonymised charts refer:

- 1) Chart 1 – Projected (surplus) / deficit by school as at December 2016.
- 2) Chart 2 – A comparison of projected carry forward balances between 15/16 and 16/17.
- 3) Chart 3 – Examines the projected outturn trend.





.07 Next Steps

- a. The Schools Finance Team to complete their school budget monitoring task, and ensure that WiSER reflects the agreed position by the end of March 2017.
- b. Where cumulative deficits for 2016/17 are a reality the Schools Finance Manager and Head of Finance will work with schools to address - potentially via the use of loan agreements.

.08 Recommendation

That the report is noted and that schools continue to work with the Council's Finance Team to ensure a clear understanding of the 2016/17 financial position and ensure that any emerging deficits are addressed in an appropriate manner.

**John Ogden
Head of Finance
February 2017**

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Schools Budget

16 February 2017

	Actual	Actual	Actual	2015-16		2016-17						All Schools	Maintained	Academies	High Needs	Early Years	Pupil Premium								
	2012-13	2013-14	2014-15	Actual	Variance	Budget	Variance	June Forecast	Variance	Oct Forecast	Variance							Dec Forecast							
INCOME																									
Maintained Schools Block	92,391	92,932	68,118	-3.8%	65,637	-0.6%	63,980	0.0%	63,980	0.0%	63,979	0.6%	64,383		64,383										
Additional Schools Grant		333	533	-2.3%	521	-52.0%	250	0.0%	250	0.0%	250	0.0%	250	250											
Academy Recoupment			19,872	24.4%	26,274	0.0%	28,999	0.0%	28,999	0.0%	28,999	0.0%	28,999		28,999										
High Needs Block			17,588	-4.7%	16,795	0.0%	17,092	0.0%	17,092	0.0%	17,092	0.0%	17,092			17,092									
Early Years Block			6,373	6.0%	6,780	-0.5%	6,749	0.0%	6,749	4.3%	7,038	2.3%	6,907				6,907								
Early Years Block 2 year olds					0		0		0		428		428				428								
Universal Infant FSM			1,298	40.9%	2,195	0.0%	2,195	0.0%	2,195	-1.5%	2,162	-1.5%	2,163				2,162								
Education Funding Agency	6,226	4,658	4,384	-24.3%	3,528	-9.6%	3,191	0.0%	3,191	0.1%	3,194	0.1%	3,194		3,194										
Pupil Premium Grant 5-16	1,237	1,913	2,735	-4.5%	2,618	2.7%	2,688	0.0%	2,688	-5.7%	2,535	0.9%	2,712					2,712							
Pupil Premium Grant 3-4					57	-1.8%	56	0.0%	56	-28.6%	40	-28.6%	40					40							
TOTAL FUNDING	99,854	99,836	120,901	17.4%	124,405	-0.5%	125,200	0.0%	125,200	0.4%	125,717	0.8%	126,168	250	67,577	28,999	17,092	9,497	2,752						
OUTGOINGS																									
1.0.1 Schools Block excluding Academies	84,944	-15.9%	73,264	-2.9%	71,195	-4.3%	68,282	-1.9%	64,683	1.3%	65,507	2.0%	65,960	0.8%	66,022		66,022								
1.0.1 Academy Recoupment			19,872	24.4%	26,274	0.0%	28,999	-2.6%	28,240	0.0%	28,240	0.0%	28,999	2.7%	28,999		28,999								
1.0.1 High Needs Block allocation (across all schools)			6,328	10.3%	7,052	-45.0%	4,864	27.2%	6,807	0.0%	6,807	-11.5%	6,022	-7.2%	6,319			6,319							
1.0.1 Pupil Premium (exc Academies)			1,880	29.4%	2,663	-4.7%	2,543	2.8%	2,613	0.0%	2,613	-9.3%	2,369	-5.5%	2,469				2,469						
1.0.1 Universal Infant FSM			1,298	40.9%	2,195	0.0%	2,195	0.0%	2,195	-1.5%	2,163	-1.5%	2,163					2,163							
1.0.1a Early Years Block allocation	3,983	31.7%	5,835	4.1%	6,087	5.5%	6,438	-0.9%	6,520	0.0%	6,520	4.4%	6,809	5.9%	6,907			6,907							
Total ISB and PVI allocations	88,927	-1.9%	87,307	19.3%	108,167	2.2%	110,596	0.0%	111,817	0.1%	111,882	0.5%	112,322	-0	112,879	66,022	28,999	6,319	9,070	2,469					
1.0.2 Pupil Premium mainstream	22	15.4%	26	46.9%	49	2.0%	50	0.0%	50	0.0%	50	158.0%	129	168.0%	134				134						
1.0.3 Pupil Premium non-mainstream	34	-88.9%	18	21.7%	23	8.0%	25	0.0%	25	0.0%	25	48.0%	37	48.0%	37				37						
Pupil Premium 3-4 years					56	0.0%	56	0.0%	56	0.0%	56	-28.6%	40	-28.6%	40				40						
1.1.3 Early Years contingency	172		0		184	36.3%	289	-20.8%	229	0.0%	229	0.0%	229	0.0%	229				229						
1.2.1 Provison for pupils with SEN (actual charges)	1,433	18.2%	1,752	25.2%	2,343	-11.2%	2,107	7.1%	2,468	0.0%	2,468	0.0%	2,468	0.0%	2,468			2,468							
1.2.2 Provison for pupils with SEN (additional charges)	110	5.2%	116	-3.6%	112	-460.0%	20	0.0%	20	0.0%	20	0.0%	20	0.0%	20			20							
1.2.4 Fees for Independent Special Schools	4,931	4.8%	5,182	8.4%	5,655	-41.9%	3,984	40.0%	5,262	12.5%	5,920	14.0%	6,000	1.4%	6,006			6,006							
Element 2 funding for post 16					546		546		0		0		0		0			0							
1.2.5 SEN transport	230	0.0%	230	0.0%	230	0.0%	230	0.0%	230	0.0%	230	0.0%	230	0.0%	230			230							
1.2.7 Inter-authority recoupment	-1,605		-46		0		0		0		0		0		0			0							
1.3.6 Pupil Referral Units	712	-54.8%	460	-22.0%	377	30.6%	543	22.8%	480	2.1%	490	-2.1%	470	-2.4%	478			478							
1.3.3 Education out of school	485	21.5%	618	2.1%	631	-8.4%	582	1.2%	617	-1.6%	607	15.1%	710	19.1%	723			723							
1.3.4 14-16 More practical learning options	582		0		0		0		0		0		0		0			0							
1.4.5 Carbon reduction allowances			91		0		0		0		0		0		0			0							
1.5.1 School meals (nursery, primary, special)	223		0		0		0		0		0		0		0			0							
1.2.1 Support for inclusion	425	56.3%	973	-69.8%	573	-2.9%	557	0.9%	362	0.0%	362	0.0%	362	0.0%	362			362							
1.2.3 Moderating panels			100	33.3%	150	0.0%	150	0.0%	150	0.0%	150	0.0%	150				150								
1.6.5 Miscellaneous	92	-24.3%	74	17.8%	90	70.6%	306	-69.9%	97	173.2%	265	173.2%	265	-63.4%	97	97	168								
1.5.2 FSM eligibility	0		0		0		0		0		0		0		0			0							
1.5.4 School kitchens (repairs and maintenance)	413		-152		103		0		0		0		0		0			0							
1.1.2 NQT induction			32	0.0%	32	0.0%	32	0.0%	32	0.0%	32	0.0%	32	0.0%	32			32							
1.6.3 School admissions	272	3.9%	283	-2.5%	276	-2.2%	270	4.1%	281	0.0%	281	0.0%	281	8.2%	304			304							
1.6.6 Servicing of Schools Forum	4	0.0%	4	0.0%	4	0.0%	4	0.0%	4	0.0%	4	0.0%	4	0.0%	4			4							
1.1.2 School specific contingencies	744	-171.5%	274	9.3%	302	18.2%	369	-24.4%	340	0.0%	340	0.0%	340	0.0%	340			340							
1.3.2 Behavioural Support Services	619	-27.1%	487	-51.7%	321	0.0%	321	0.0%	321	0.0%	321	0.0%	321	0.0%	321			321							
1.4.1 Support for ethnic minority and bilingual	134	-8.9%	123	9.6%	136	3.5%	141	3.5%	146	0.0%	146	0.0%	146	0.0%	146			146							
1.6.1 Insurance	568	1.7%	578	-2.3%	565	11.4%	638	-12.5%	586	0.0%	586	0.0%	586	0.0%	586			586							
1.6.4 Licenses / subscriptions	191	20.7%	241	2.4%	247	-10.3%	224		339	0.0%	339	0.0%	339	0.0%	339			339							
1.4.10 Pupil growth / infant class sizes			639	-4.6%	611	19.6%	760	-23.0%	1,232	39.0%	1,713	21.1%	1,492	-12.9%	1,492	1,492									
1.6.7 Staff costs - supply cover	415	-5.1%	395	0.3%	396	3.4%	410	-10.0%	369	0.0%	369	0.0%	369	0.0%	369			369							
Total Central Expenditure	11,206	9.6%	12,398	7.2%	13,360	-5.9%	12,614	6.0%	13,696	9.5%	15,003	9.7%	15,020	-0.6%	14,907	1,897	2,301	0	10,437	229	211				
1.8.1 TOTAL SCHOOLS BUDGET	100,133	-0.4%	99,705	18.0%	121,527	1.4%	123,210	0.6%	125,513	1.1%	126,885	1.5%	127,342	0.7%	127,786	1,897	68,323	0	28,999	0	16,756	0	9,299	0	2,680
Surplus / Deficit	-279		131		-626		1,195		-313		-1,685		-1,625		-1,618										
Reserves b/fwd	1,752		1,475		1,607		982		1,151		2,177		2,177		2,177										
Reserves c/fwd	1,473		1,606		981		2,177		838		492		552		559										
Memo WBC Central Overhead Costs					457	0.0%	457	0.0%	457	0.0%	457		459		459										

317

3,224

369

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	April		May		June		July		August		September		October		Original Budget		Variance		
	Pupil #	£	Pupil #	£	Pupil #	£	Pupil #	£	Pupil #	£	Pupil #	£	Pupil #	£	from Jan 2016				
Shinfield West	Delayed till Sept 2017														92,544	65,000	65,000	36,868	28,132
Total Shinfield West																	65,000	36,868	28,132
Charvil	30		48664						3,779		113,374	113,374	113,374	140,773		(27,399)			
Windmill	30										95,038	95,038	95,038	102,459		(7,421)			
Wheatfield	30										95,201	95,201	84,152	89,087		(4,935)			
Montague Park	30										35,000	125,000	223,770	84,503		139,267			
Total Academy																	516,334	416,822	99,512
Colleton	25	40,553	25	40,553	25	40,553	25	40,553	25	40,553	25	40,553	25	40,553	39,579		974		
Grazeley	15	24,332	15	24,332	15	24,332	15	24,332	15	24,332	15	24,332	15	24,332	23,748		584		
Hawkdon	8	12,977	8	12,977	8	12,977	8	12,977	8	12,977	8	12,977	8	12,977	83,908		(70,931)		
Shinfield St Marys	30	48,664	30	48,664	30	48,664	30	48,664	30	48,664	30	48,664	30	48,664	47,495		1,169		
Loddon	90	157,500	90	157,500	90	157,500	90	157,500	90	157,500	60	97,328	60	97,328	94,990		2,338		
Beechwood	15	26,250	15	26,250	15	26,250	15	26,250	15	26,250	15	24,332	15	24,332	23,748		584		
Highwood	30	52,500	30	52,500	30	52,500	30	52,500	30	52,500	0	-	0	0	47,495		(47,495)		
Total Bulge																	248,187	360,963	(112,776)
Bohunt															662,526	662,526	662,526	417,153	245,373
Total Bohunt																	662,526	417,153	245,373
Total reported to SF	333	362,777	48877.18	362,777	213	362,777	213	366,556	213	1,456,460	153	1,404,326	153	1,492,047	1,231,806	260,241			

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SCHOOLS FORUM

Date of Meeting: 22.02.17

For: Information

SEN Alert

Purpose of the report:

1. To update forum on new expenditure on Independent Special School Placements since the last forum

Summary / background / update:

2. At December forum, a complete breakdown of all the current Independent special school placements was provided including data on Children in Care in Independent specialist placements and placements which are jointly funded by either social care (both children and adults) and/or health.

Since December forum, the following prospective placements reported on as needed for 2017/18 have resulted in placement and the costings to the HNS block is as follows:

Placement for 1 student to start after half-term at The Green Room £30K pa

Placement for 1 student to start after half-term at Beech Lodge £24,960 pa

2 current placement searches for SEMH special still ongoing (Yr8/Yr10)

2 current placement searches for ASD special still ongoing (2 x Yr 8)

Since December forum: -

1 placement search required for Independent special Y11/Post 16

1 parental preference for Forest Bridge Independent ASD - Y2

Options / suggested actions:

3. Forum has requested a zero-based activity to be undertaken by Hawa Bedwa and Claire O'Leary/Linda Orr. The first stage in this is a joint W. Berks meeting has been set up for 16.02.17 to consider local joint commissioning and procurement processes.

Linda Orr
SEN Team Manager

Apprenticeship Levy

.01 Purpose of the Report

To provide the Schools Forum with an update of the apprenticeships levy strategy and the processes for schools payroll provided by Selima. The report's objective is to assist Forum to understand the Councils' position and the implementation of processes to achieve the central government aim for nationally recognised apprenticeships training courses and provisions.

.02 Suggested Action

The Forum is asked to note the contents of the CLT draft report and FAQs, and the implementation of payroll arrangements to ensure successful operations towards achieving the apprenticeship levy mission.

.03 Background

The reports provides an update of the Councils work in progress of the apprenticeship levy legislation and the anticipated actions to be undertaking following gaining access to on-line portal for managing the operations. Also the role of schools payroll provider, Selima.

.04 Summary

In additions to the CLT report and FAQs, the apprenticeship levy process is an additional element to the current payroll operations as unlike employer's NI and pension calculations, the apprenticeship levy amount cannot be computed at the same time as these on-costs calculations due to the requirement of HMRC confirmation of acceptance of payroll submitted returns and agreed deductible positions.

Therefore, after the month's payroll(s) have completed, an Employer Payment Summary (EPS) is sent to HMRC after 5th of the following month and it is at that time that the system knows the whole of the amount to calculate the levy on and it is at that point that the information is recorded on the payroll system and sent to HMRC.

From April 2017, the schools payroll provider will be calculating 0.5 percentage on the exact pay bill for all maintain and voluntary controlled schools towards meeting the levy contribution, and these amounts will then be included in the HMRC payments.

The following should be noted as incorporated within the operations:

- a. Confirmation that voluntary aided schools sharing the Councils payroll with pay bill under £3m will be excluded from the Councils' levy calculations due to different employer status
- b. Confirmation that Levy costs to schools to be apportioned on the exact monthly costings to each schools for equitable share of costs
- c. Confirmatin that the levy cannot be calculated during the payroll processing therefore will not be included in the ledger export produced for each pay run.
- d. Report to be made available to schools finance on monthly basis to assist monitoring for schools contributions and usage of the system.

Selima will be providing further information for the apprenticeship levy and other year-end related topics to all schools towards the end of February 2017.

.05 Recommendation

That the reports are noted and that schools continue to work with the Council's Finance Team and Selima payroll to ensure a clear understanding of the apprenticeship levy operations and that issues are addressed in an appropriate manner.

John Ogden
Head of Finance
February 2017

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Apprenticeship Levy

CLT Report, February 2017

On 6 April 2017 the new Apprenticeship Levy is being introduced, as part of changes to the way in which apprenticeships training is funded. All employers with a pay bill of over £3m each year will need to contribute to the levy. The first payment will be made in April 2017 and be available from 1 May 2017.

Where an employer has a pay bill of over £3m each year, the levy must be paid by every organisation with the same employer (called connected organisations) and so all maintained and voluntary controlled schools will be required to pay the levy as the Council is the employer.

The levy from all connected organisations will be paid in to one digital account with the employer, responsible for the mechanism for providing access to the funding. There is no requirement for the employer to ring-fence funding for each connected organisation.

From 1 May 2017, all new apprenticeships will be advertised, commissioned and paid for through a digital account. The levy will not affect the way training is funded for any apprentices who started an apprenticeship programme before 1 May 2017; any such apprenticeships will need to follow the terms and conditions that were in place at the time the apprenticeship started.

The funds are available to be spent on apprenticeship training only and cannot be used for the salary costs of apprentices. However, the levy can be used to fund both new and existing employees who take on an apprenticeship.

Recommendation and decisions

1. ***The Council must determine how it wishes to coordinate and manage the levy.*** There is no current role or resource identified to manage this and so there will need to be resources identified to deliver this. Apprenticeships are currently delegated to managers to create, recruit and deliver. It is recommended that a resource is obtained and funded in the short-term to set-up a Council-wide apprenticeship programme which can become business as usual, while investigating the opportunity for the Council to become an 'Employer Provider' (see point 4)
2. ***The Council must create a model for making use of the funding for new or existing employees.*** It is proposed that this could be used primarily to support succession planning and Council-wide priorities around social care, education, management and more. Thereby offering existing staff formal development opportunities and removing the need to pay the additional salary costs of new starters.
3. ***The Council will need to determine a mechanism for providing access to the levy from connected organisations (schools).*** It is recommended that the Council set up a working group to consider the options and optimal solution in conjunction with our schools.

4. ***The Council must determine if it wishes to be a provider of apprenticeship training.*** This is an intensive process and comes with risks relating to structured learning and a need for an additional Ofsted inspection. However, being a provider could be a route to ensuring more of the levy is retained by the Council as providers can make broader use of the levy while offering the potential for income by selling these services to others. It is recommended that the Council undertake work to assess the risk and reward associated with becoming a provider.

Paying the Levy

Employers with an annual pay bill of more than £3 million will need to spend 0.5% of their total pay bill on the apprenticeship levy minus the 'levy allowance' of £15,000 per year.

Employers must declare the levy payable, based on their payroll year to date, to Her Majesty's Revenue and Customs (HMRC). The levy will be paid through the normal PAYE process from May 2017. It will be collected each month unless HMRC are informed otherwise. Apprenticeship levy payments are allowable for Corporation Tax.

Connected Organisations

Connected organisations are those where the employer is the same, even where they have separate payrolls. Therefore, all maintained and voluntary controlled schools will be required to pay the levy as the Council is the employer.

The levy for all connected organisations will be paid in to one digital account with the employer, responsible for the mechanism for providing access to the funding. There is no requirement for the employer to ring-fence funding for each connected organisation. Therefore, the employer has flexibility to use all funding as it feels appropriate.

Only one 'levy allowance' will be available across all connected organisation and there will be only one digital account.

Digital Apprenticeship Service (DAS)

A new digital apprenticeship service has been set up and all employers can gain access to their personal digital account by registering for an account. Through this digital account, employers will be able to;

- select an apprenticeship framework or standard (type of apprenticeship)
- choose the training provider or providers to deliver the training
- choose the organisation that will assess your apprentices
- post apprenticeship vacancies
- set the agreed price with the training provider
- pay for apprenticeship training and assessment
- stop or pause payments (e.g. if an apprentice stops training or takes a break)

Accessing Apprenticeship Funding

The levy will be added to the digital account the calendar month after it is taken and will include a 10% top-up from Government.

The funds are available to be spent on apprenticeship training only and cannot be used for the salary costs of apprentices. However, the levy can be used to fund both new and existing employees who take on an apprenticeship.

Funding will expire 24 months after it has entered the digital account. Notification of funding loss will be provided in good time to try to ensure funds can be used and the oldest funding will be used first when payments are made for training.

In the first year the levy will only be available for use on employees of the employing organisation, but changes are being proposed to allow 10% of funding to be directed for use in other organisations e.g. partners or contractors.

Selecting Apprenticeship Training

Once an apprenticeship is identified the training will need to be sourced through the DAS and costs agreed with the provider. The training will need to be from a government-approved training provider and from the;

- **apprenticeship standards** - each standard covers a specific job role and sets out the core skills, knowledge and behaviours an apprentice will need to be fully competent in their job role and meet the needs of employers
- **apprenticeship frameworks** – a series of work-related vocational and professional qualifications, with workplace and classroom based training

The new apprenticeship funding system places an upper limit on the cost for each standard or framework, with a total of 15 funding bands available ranging from £1,500 to £27,000. Employers are expected to negotiate a price for their apprentice's training and assessment up to the upper limit.

The upper limit is the maximum that the Government will co-invest; however, employers can pay more but would not need to cover the costs beyond the upper limit with their own funds and not from their digital account. There are no lower limits for the bands.

Although providers are obtained through the DAS there remains a need to comply with Public Contracts Regulation 2015.

Please note: the funding of apprenticeships has some requirements; therefore an employee can only be funded where the apprenticeship will lead to substantive new skills being obtained or to undertake an apprenticeship at a higher level than any qualifications already held.

Employer Provider

Organisations have the option to become an employer provider, meaning they employ the apprentices but also provide the training element of the apprenticeship. This training can be provided to their own apprentices only.

However, if there is sufficient demand or ability then organisations can become a provider or subcontractor (for a main provider) and thereby provide apprenticeship training to any organisation.

To become an employer provider the organisation must register as a provider, an opportunity which is permitted every three months. This is an intensive process and requires the organisation to commit to clear standards, including an agreement to undertake additional Ofsted inspections.

Paying for Apprenticeship Training

The agreed costs for the apprenticeship training will then be taken from the employer's DAS account each month to pay the training provider. This will see payments totalling 80% of the negotiated price made on a monthly basis, spread evenly across the period of the apprenticeship. This is paid in arrears for training reported as being completed.

The remaining 20% will be paid at the end of the apprenticeship, as can be used to ensure training is completed to the appropriate level and standard.

It is the responsibility of the employer to ensure there are sufficient funds available to cover the costs of agreed apprenticeships. Where funding is not available, the employer will need to make separate arrangements to make a payment to the provider outside of the DAS.

Please note: the money within the DAS account can only be used towards costs of apprenticeship training and end point assessment. It can't be used on other costs associated with your apprentices or wider training i.e. wages, travel and subsistence costs, managerial costs, traineeships, work placement programmes or the costs of setting up an apprenticeship programme.

Apprenticeship Training Agencies (ATAs)

There will be no provision, in the first year, to use the levy to cover the costs of apprenticeships provided through ATAs. In 2018, there will be an ability to transfer 10% of the levy to nominated organisations, such as ATAs. However, even at this time, there will be no provision to allow ATAs to receive additional support.

Additional Support

The Government wishes to get young people (aged 16-18) and care leavers (aged 19-24) into quality apprenticeships and so has chosen to recognise the potential additional costs associated with supporting these groups in the workplace (e.g. more supervision and pastoral care) through an additional payment of £1,000 which will be given to each of the employer and the training provider .

The payment will be made to the training provider in two equal instalments, after 3 months and 12 months, with the employer element passed on by the training provider. These payments will come direct from the Government and will not be deducted from an employer's digital account.

In addition, the government will also pay £471 to training providers for all English and Maths qualifications obtained by apprentices. These payments also come direct from the Government and not from the digital account.

Apprenticeship Targets

The Government has stated that it will not set sectoral or level based targets but that it should be up to employers to create the apprenticeships they require to meet their skills needs. However, there is to be a duty placed on public sector employers to ensure that apprentices make up 2.3% of the workforce headcount.

The number will include those who have started an approved apprenticeship (framework or standard) in the year of measurement. Existing apprenticeships will not count towards the target. This target includes all connected organisations i.e. where the local authority is the employer, and so maintained and voluntary controlled schools will fall into this category and add to the target for apprenticeships.

As an example, 2.3% of 1100 (Council) employees would mean 25 apprentices required each year, while 2.3% of 3000 (Council and School) employees would mean 69 apprentices required each year. The Government has confirmed that Local Authorities can show the results for schools separately in their annual report.

Public bodies must 'have regard' to the target and report annually, setting out how they plan to meet this and where the target has not been met, what plans are proposed to redress this. There are no legal or financial penalties or sanctions for not meeting the target it is purely reputational risk.

Billy Webster
Head of Support Services
February 2017

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Apprenticeship Levy Schools FAQs, February 2017

The following Frequently Asked Questions (FAQs) have been developed to provide guidance to schools that may have questions about the Apprenticeship Levy. For further guidance please contact your HR Provider.

Why is the levy being introduced?

The levy is being introduced to raise the number and quality of apprenticeships. It will raise around £3 billion each year to fund apprenticeships.

When is the levy being introduced?

On 6 April 2017 the new Apprenticeship Levy is being introduced, as part of changes to the way in which apprenticeships training is funded. The first payment will be made in April 2017 and be available from 1 May 2017.

Who is required to pay the levy?

Employers with an annual pay bill of more than £3 million will need to spend 0.5% of their total pay bill on the apprenticeship levy minus the levy allowance of £15,000 per year. Only one levy allowance will be paid per employer.

Do school's need to pay the levy?

Maintained and voluntary controlled schools will be required to pay the levy as the Council is the employer. All other school's will only be required to pay the levy where they have an annual pay bill of more than £3 million or where they are part of a multi-academy trust who has such a pay bill.

Where do the levy payments go?

Levy contributions are added to a digital account provided by the Digital Apprenticeship Service (DAS). Funds are available the month after they have been taken and the Government add a 10% top-up to the monthly levy contributions.

All funds are placed in to the digital account of the employer, and so the levy from maintained and voluntary controlled schools will be added to the digital account of the Council.

How can the funds be used?

The funds are available to be spent on apprenticeship training only and will expire 24 months after they have entered the digital account. Notification of the expiration of funds will be provided in good time to try to ensure they are used and the oldest funding will be used first when payments are made.

What happens to those that do not pay the levy?

If an employer does not need to pay the levy then they will still use the Digital Apprenticeship Service (DAS) to obtain apprentices and training, but they will only be required to pay 10% of the costs with the Government paying the other 90%.

Will schools have a levy allocation?

The Council is keen to work with schools that pay the levy to determine the best way of managing the levy to provide the best outcomes for schools who contribute to it. There is no requirement for funds to be ring-fence which permits a degree of flexibility to any preferred approach.

The Council is awaiting further guidance on how the digital account will work and how schools can gain access to the funding available. At present it is clear that the contributions from all maintained and voluntary controlled schools will be added to the Council's digital account, with the Council responsible for the mechanism for providing access to the funding.

How is the levy paid?

A payment of 0.5% of the total pay bill is to be paid, minus the levy allowance of £15,000 per year. However, this levy allowance is only applicable once per employer not per organisation. Employers must declare the amount of levy payable, based on their payroll year to date, to Her Majesty's Revenue and Customs (HMRC).

The levy will be paid through the normal PAYE process from April 2017. It will be collected each month unless HMRC are informed otherwise. Apprenticeship levy payments are allowable for Corporation Tax.

What is the digital apprenticeship service (DAS) and Digital Account?

The DAS and Digital Account are part of a new online portal that has been set up for all employers to obtain useful information about apprenticeships and to undertake the following activities;

- select an apprenticeship framework or standard (type of apprenticeship)
- choose the training provider or providers to deliver the training
- choose the organisation that will assess your apprentices
- post apprenticeship vacancies
- set the agreed price with the training provider
- pay for apprenticeship training and assessment
- stop or pause payments (e.g. if an apprentice stops training or takes a break)

Will schools have access to the digital apprenticeship service (DAS)

Yes. All employers will have access to the DAS which will allow them to;

- select an apprenticeship framework or standard (type of apprenticeship)
- choose the training provider or providers to deliver the training
- choose the organisation that will assess your apprentices

- post apprenticeship vacancies

Will schools have access to the digital account?

The Council is awaiting more information before it can determine if, and how, access can be provided to schools.

How can I set up an apprenticeship using the levy?

From 1 May 2017, all new apprenticeships will be advertised, commissioned and paid for through the DAS and digital account. This will include both new employees and existing staff who begin an apprenticeship after that date.

Can I use the levy to pay for an apprenticeship for existing employees or those with existing qualifications?

Yes. The levy can be used for apprenticeships for new employees and existing staff who begin an apprenticeship after 1 May 2017. However, an employee can only be funded where the apprenticeship will lead to substantive new skills or to undertake an apprenticeship at a higher level than any qualifications already held.

Can I use the levy to pay for apprenticeships that are already underway?

No. The levy will not affect the way training is funded for any apprentices who start an apprenticeship programme before 1 May 2017, any such apprenticeships will need to follow the terms and conditions that were in place at the time the apprenticeship started.

What types of apprenticeship training are available?

All training on the digital apprenticeship services (DAS) is provided by registered and approved providers and offering apprenticeships that fit defined standards or frameworks;

- *apprenticeship standards* - each standard covers a specific job role and sets out the core skills, knowledge and behaviours an apprentice will need to be fully competent in their job role and meet the needs of employers
- *apprenticeship frameworks* – a series of work-related vocational and professional qualifications, with workplace and classroom based training. These are slowly being replaced by apprenticeship standards.

How much will apprenticeship training cost?

The new apprenticeship funding system places an upper limit on the cost for each standard or framework, with a total of 15 funding bands available ranging from £1,500 to £27,000. Employers are expected to negotiate a price for their apprentice's training and assessment up to the upper limit.

The upper limit is the maximum that the Government will co-invest, however, employers can pay more but would not need to cover the costs beyond the upper limit with their own funds and not from their digital account. There are no lower limits for the bands.

Although providers are obtained through the DAS there remains a need to comply with Public Contracts Regulation 2015.

Can I use an Apprenticeship Training Agency (ATA)?

No. At this time there is no provision to use the levy to cover the costs of apprenticeships provided through ATAs. This is being considered by the Government for future changes to the digital apprenticeship services (DAS).

Is there additional support for young apprentices or care leavers?

Yes. The Government wishes to get young people (aged 16-18) and care leavers (aged 19-24) into quality apprenticeships. To recognise the potential additional costs associated with supporting these groups in the workplace (e.g. more supervision and pastoral care) through an additional payment of £1,000 which will be given to each of the employer and the training provider.

The payment will be made to the training provider in two equal instalments, after 3 months and 12 months, with the employer element passed on by the training provider. These payments will come direct from the Government and will not be deducted from an employer's digital account.

What is my apprenticeship target?

The Government has placed a duty on public sector employers to ensure that apprentices make up 2.3% of the workforce headcount. The number will include those who have started an approved apprenticeship (framework or standard) in the year of measurement. Existing apprenticeships will not count towards the target.

This target will apply to all employers who pay the levy e.g. maintained and voluntary controlled schools.

What happens if we do not meet our target?

Public bodies must 'have regard' to the target and report annually, setting out how they plan to meet this and where the target has not been met, what plans are proposed to redress this.

There are no legal or financial penalties or sanctions for not meeting the target it is purely reputational risk.

Billy Webster
Head of Support Services
February 2017

SCHOOLS FORUM

Date of Meeting: 22 February 2017

For: Consultation

Membership of the Schools Forum

1. Purpose of the report:

To review Forum membership in the light on new pupil population statistics.

2. Summary

Forum membership was reviewed in late 2015, with a changed balance of schools' representation established, based on May 2015 pupil census data. The current review updates this with reference to October 2016 census figures. In terms of putr

3. Background

Requirements

Membership requirements are set out in the School Forum regulations. Requirements for representation in Wokingham (given that there are schools in all the categories below) are:

- academies at least 1
- schools/academies at least 2/3 in relation to non-school members
- maintained schools at least 1 head; at least 1 secondary; at least 1 governor
- special schools at least 1
- nursery schools at least 1
- PRUs at least 1
- 14-19 partnership at least 1
- Early Years providers at least 1

The LA is *required* to secure that primary, secondary and academy schools' representation is broadly proportionate, having regard to the number of *pupils* registered at them.

The LA has a *power* to determine that the number of members representing schools in a particular category must be broadly proportionate to the total number of *schools* in that category when compared with the total number of schools.

The LA has a power to appoint non-schools members for a term of office it determines. Schools members are elected by members of the relevant group. Determination of their term of office is not specified.

Wokingham Schools Forum Constitution

Wokingham's Schools Forum comprises 27 places. 7 are for 'non-school' members appointed by the LA, 20 for 'schools' members. Changes made in 2015 related to pupil population statistics in Table 1. The 2016 statistics are in table 2, indicating only marginal changes.

Table 1: Distribution of Pupil Population: May Census 2015

	Maintained	Academy
Primary	14459 57%	128 (inc. Charvil) 0.5%
Secondary	3162 13%	7063 28%
Special	266 1%	0
Total	17887 71%	7191 28.5%

Table 2: Distribution of Pupil Population: October Census 2016

	Maintained #	% (rounded)	Academy #	%
Primary	14449	57%	561 (inc. Charvil)	2%
Secondary	3046	12%	7233	28%
Special	248	1%	0	
Total	17610	69%	7794	31%

Applying these percentages to Wokingham's Schools Forum would cause no changes from last year (but see below p2). There are 20 schools members, of which 3 are required by regulation: 1 nursery, 1 special and 1 PRU. With 17 remaining schools members, the overall "best fit" representation would remain as follows, in compliance with minimum requirements noted above and assuming overall numbers continue.

Table 3: Implied Distribution of Membership

	Maintained	Academy
	rounded	rounded
Primary	10 up	0 down
Secondary	2 down	5 up
Special	1 (minimum)	0
PRU	1 (min)	
Nursery	1 (min)	

Points to note:

- The under-representation of primary academies is balanced by over-representation of secondary, with one of the secondary representatives currently responsible for a primary phase
- Reciprocal balance obtains both by phase and school status
- The 2015 report confirmed
 - phase representation might include governors and professional representatives within the numbers above
 - a transitional period in which additional members would be included, reflecting previous membership but not to increase the number of votes by phase/status of school
 - 6th form numbers were to be included in the calculations
 - An aspiration to reduce Forum numbers over time
 - 3 year tenure

In the light of these points

- Balanced representation appears to have been satisfactory for the past year and should be retained as the “best fit” option
- Schools have been represented by headteachers, business managers and governors
- It appears difficult to predict the future of Schools Forum beyond three years, which might be seen to influence views of the merit of making discretionary changes now.
- Additional members remain, with the result that a decision should be made to continue or not continue this arrangement (see below)
- There appears to be no current appetite to reduce numbers, nor to increase
- A “churn” of post-holders has meant that records of membership duration have not been retained. Records are now being established for the purpose of determining 3 year tenure, although future actions might reasonably be held pending national clarification of the duration of Schools Fora.

Deciding about changing from current to new membership

Current membership is shown in the annex. There appear to be one too many primary places, one too few secondary/academy, one too many PRU and Early Years, and a vacancy for the RC diocese. This appears to reflect the wish to accommodate change in member numbers by providing for voting numbers according to table 3 whilst retaining additional non-voting members on a transitional basis. So:

- Primary schools should be asked to confirm their 10 representatives or Forum should confirm the 10 votes for the phase
- Secondary academies should be asked to confirm their additional one
- Forum should confirm if it would recommend retaining the current transitional arrangement of supernumary membership, noting the options for supernumary primary, and PRU representatives, subject to which...
- The PRU should be asked to confirm their individual representative

Secondary

1. Ginny Rhodes
2. Paul Miller

Secondary Head – St Crispins
Governor – St Crispins - Chair

Academy / Free School

1. Derren Gray
2. Mary Davies
3. Maggie Seagrove
4. Janet Perry

Academy Head Teacher – The Piggott School
Academy Head Teacher – Maiden Erlegh School
Free School Head Teacher - Oakbank
Academy Business Manager – The Holt School

Special Schools/PRU

1. Sara Attra
2. Jay Blundell
3. John Bayes

Special school Head – Addington School
Pupil Referral Unit – Foundry College
Governor – Foundry College – Vice-Chair

Non School Representatives

1. Anne Andrews
2. Vacancy
3. Richard Dolinski
4. Vacancy
5. James Taylor
College
6. Gail Prewett
Complex
7. Mary Parker

Oxford Diocese
Roman Catholic Diocese
Wokingham Borough Council
Children's Services officer
Post 16 provider Bracknell & Wokingham

Poperinghe Pre-School, AWS Community

St Pauls Playgroup at Emmbrook Infant

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Schools Forum Forward Plan 2016 /17

22nd	February	Revenue Monitoring
	2017	SEN Alert
		Report on pupil movement and lagged/double funding

29th	March	Revenue Monitoring
		Final 2017/18 Budget
		Update on the 5 year plan with an analysis of variation

24th	May	Revenue Monitoring
		Outturn 2016/17
		SEN Alert
		Report on Foundry College and an alternative provision review

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