



WOKINGHAM BOROUGH COUNCIL

A Meeting of the **SCHOOLS FORUM** will be held in Bohunt School, Sheerlands Road, Arborfield, RG2 9GB on **WEDNESDAY 17 JANUARY 2018 AT 10.00 AM**

A handwritten signature in black ink, appearing to read 'Manjeet Gill', is written over a light grey rectangular background.

Manjeet Gill
Interim Chief Executive
Published on 9 January 2018

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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
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
Corrina Gillard	Headteacher - Emmbrook Infant School
Kerrie Clifford	Maintained Nursery Acting Headteacher
Jay Blundell	Pupil Referral Unit Headteacher - Foundry College
Sara Attra	Special School Head - Addington School
Ben Godber	Academy Headteacher - Bohunt
Jonathon Peck	Director of Finance and Operations - Maiden Erlegh
Keith McConaghy	School Business Manager - Oakbank
Emma Clarke	Primary Head - Farley Hill

Non School Representatives

Anne Andrews	Oxford Diocese
Vacancy	Roman Catholic Diocese
UllaKarin Clark	Wokingham Borough Council
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 2 votes are allowed.

From the Pupil Referral Unit only 1 vote is allowed.

ITEM NO.	WARD	SUBJECT	PAGE NO.
28		APOLOGIES To receive any apologies for absence.	
29		MINUTES OF PREVIOUS MEETING To confirm the Minutes of the Meeting held on 13	7 - 16

December 2017.

30		DECLARATION OF INTEREST To receive any declarations of interest.	
31	None Specific	REVENUE MONITORING To receive a report containing the current schools' financial position.	17 - 20
32	None Specific	CONTINGENCIES BREAKDOWN To consider a report containing details of the contingencies breakdown.	21 - 22
33	None Specific	EARLY YEARS UPDATE To receive a report containing an update on Early Years expenditure.	23 - 24
34	None Specific	HIGH NEEDS BLOCK - CONSULTATION To receive a report outlining the findings of the High Needs Block consultation.	25 - 28
35	None Specific	SCHOOLS BLOCK BUDGET CONSULTATION To receive a report containing the Schools Block Budget consultation.	29 - 34
36	None Specific	DE-DELEGATED ITEMS 2018-19 To consider a report outlining the De-delegated items for 2018/19.	35 - 40
37	None Specific	SPLIT SITE CRITERIA To receive a report containing details of a proposed split site criteria.	41 - 42
38	None Specific	2018-19 SCHOOL BLOCK BUDGET To receive and consider a report outlining the 2018/19 School Block Budget to be submitted to the DfE.	43 - 52
39		FORWARD PROGRAMME To consider the Forums work programme for the remainder of the municipal year.	53 - 54
40		EXCLUSION OF THE PUBLIC That under Section 100(4) of the Local Government Act 1972, the public be excluded from the meeting for the following items of business on the grounds that they involve the likely disclosure of exempt information as defined in Paragraph 1 and 2 of Part 1 of Schedule 12A of the Act as appropriate.	
41	None Specific	EDUCATION, HEALTH AND CARE PLAN AUDIT REPORT SUMMARY To receive a summary of the Education, Health and	55 - 90

Care Audit report.

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 13 DECEMBER 2017 FROM 10.00 AM TO 11.40 AM**

Schools Representatives

Helen Ball	Primary Head - Polehampton Infant
Ali Brown	Primary Head - Nine Mile Ride Primary
Brian Prebble	Primary Head - Rivermead Primary
Elaine Stewart	Primary Head - Aldryngton 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
Derren Gray	Academy Headteacher - The Piggott School
Jay Blundell	Pupil Referral Unit Headteacher - Foundry College
Sara Attra	Special School Head - Addington School
Ben Godber	Academy Headteacher - Bohunt
Jonathon Peck	Director of Finance and Operations - Maiden Erlegh
Keith McConaghy	School Business Manager - Oakbank
Paul Miller	Governor - St Crispins - Chairman
John Bayes	Governor - Foundry College - Vice-Chair
Ian Head	Governor - Aldryngton Primary

Non School Representatives

Anne Andrews	Oxford Diocese
UllaKarin Clark	Wokingham Borough Council
Mary Parker	Early Years Representative

Also Present

Madeleine Shopland, Democratic & Electoral Services Specialist
Carole Burrow, Interim Lead Officer School Admissions
Coral Miller, Interim Senior Finance Specialist, Schools
Lynne Samuel, Senior Finance Specialist, People Services
Jane Winterbone, Interim Assistant Director, Education
Jackie Whitney, Service Manager, Customer Services

17 APOLOGIES

Apologies for absence were submitted from Emma Clarke, Kerrie Clifford, Corrina Gillard, Sally Hunter, John Ogden, Janet Perry, Gail Prewitt, Ginny Rhodes, Paul Senior and James Taylor.

An apology for lateness was received from Ben Godber.

18 MINUTES OF PREVIOUS MEETING

The Minutes of the meeting of the Forum on 18 October 2017 were confirmed as a correct record and signed by the Chairman.

19 MATTERS ARISING

In response to a question from John Bayes regarding the distribution of the PE grant of £250,000, Coral Miller indicated that it was passported from the Department for Education (DfE) to the schools. Paul Miller stated that it appeared as a separate line item and went on to question why it had not been shown in that way in previous years and if it was a new

item. Coral Miller commented that there was likely to have been a presentation error previously and that it was not new.

The Forum asked that John Ogden be asked to respond to the following outstanding actions:

- Provide a breakdown of how the contingencies money to Early Years was being used in future monitoring reports;
- Information on the volume entrance so that it could be identified what the run rates were for 2016/17, how they compared to 2017/18 and what was expected for the rest of the year;
- Reconsider the introduction of traded services charges.

Lynne Samuel commented that the Early Years report to the Forum's January meeting would include a breakdown of how the contingencies money to Early Years was being used. The Forum would be asked what information they would like to see on a regular basis.

Paul Miller reminded the Forum that at the previous meeting the proposal to move half a percent from the 2018/19 Schools Block Budget to the High Needs Block had not been agreed. The Council had then applied to the DfE to be allowed to move the half percent from the School Block Budget. Coral Miller was asked to inform the Forum when a response and approval was received from the DfE.

The Forum discussed the traded services charges. The charges were part of the trading account and would continue.

20 DECLARATION OF INTEREST

There were no declarations of interest received.

21 SCHOOL ADMISSIONS UPDATE

Carole Burrow and Jackie Whitney took the Forum through a report regarding the School Admissions Process Improvements which was set out in Agenda Pages 17 to 19.

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

- School Admissions was part of the Customer and Locality Services.
- Over the last 12 months a review of all school admissions processes, workload, technology and resources had been undertaken. A number of improvements and efficiencies including the following had been made:
 - Upgraded technology to allow customers to apply online, at a time and place that suited them;
 - Auto acknowledgement emails sent to receipt applications;
 - Reduction in print costs and signposting to online information where possible;
 - Emailing correspondence, such as offers, considerably reducing the number of paper responses;
 - Some automated checking which represented a time saving; and
 - Approximately 15,000 calls per year were being redirected through the Customer Services Team.
- The Forum was informed that the traded services fees generated for 2017 amounted to £16,051.35.

- Elaine Stewart asked about admission appeals becoming more complex and time consuming. Carole Burrow commented that place planning could be difficult and that there were minimal places available in some areas and year groups. Anyone who had applied for a school place and been refused had the right to an appeal. Carole Burrow also commented that placing children who did not have a Statement of Special Educational Needs but did have complex behavioural, educational or social needs, could be complicated.
- Families split between a number of different schools was an increasing issue. Brian Prebble questioned whether the admission criteria could be amended so that siblings were a higher priority. Carole Burrow commented that there had been a consultation on the matter several years ago. It was likely that those living in the designated area without siblings might feel disadvantaged by any such change. The Forum was informed that if a child was diverted to a school any siblings were afforded protected designated area sibling status. This was highlighted in the Parent's Guide.
- Paul Miller asked how far in advance the admissions policy was set. Jane Winterbone stated that consultation on admission arrangements was carried out approximately 18 months in advance. Helen Ball asked who decided what information was contained in the consultation. The Forum was informed that this was discussed by the School Admissions Forum.
- John Bayes commented that he wanted to see more financial information to provide assurance with regards to the value for money offered by the service. He questioned how much was spent on appeals. Carole Burrow commented that the Council had a statutory responsibility to undertake admission appeals. There were approximately 200 appeals per year. The majority of money spent on appeals went towards salaries and internal recharges. Coral Miller was asked to provide a breakdown of the School Admissions budget and savings made. Jackie Whitney emphasised that there had been a big reduction in printing costs. The Council was going through the 21st Century Council process and consideration would be given to refining processes even more where possible.
- In response to a comment from John Bayes, Jackie Whitney clarified that the Forum would not yet see a change in the relevant budget line as a number of the improvements which had been implemented were reasonably new.
- Jane Winterbone stated that the Forum would be provided with benchmarking information regarding the spend on school admissions by other similar local authorities. She emphasised that School Admissions was lean and efficient with a number of good processes in place.
- The volume of appeals was unlikely to reduce significantly in future for various reasons.
- Helen Ball stated that it would be useful to ask schools for their views on the improvements. Jackie Whitney indicated that there would be a lessons learnt on people, processes and technology following the secondary school applications process. The views of families and schools on the process would be sought. This had not yet been undertaken due to resourcing issues. Mary Parker asked that pre-schools also be consulted. She emphasised that their printing costs had increased. Carole Burrow informed Forum members that families could visit the Council offices if they wished and paper copies of the appeal form would be provided. Jane Winterbone suggested that Mary Parker and Helen Ball be invited to participate in the consultation.
- Paul Miller asked that the results of the consultation be shared with the Forum.

RESOLVED: That

- 1) the School Admission Update be noted;
- 2) Coral Miller provide a breakdown of the School Admissions budget and savings made at the next Schools Forum meeting;
- 3) the Forum be provided with benchmarking information regarding the spend on school admissions by other similar local authorities.

22 REVENUE MONITORING

Coral Miller went through the Revenue Monitoring report which was set out in agenda pages 21 to 24.

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

- Coral Miller explained that the report provided details of the revenue budget position as at 31 October 2017.
- The report detailed the expected out-turn for the Dedicated Schools Grant (DSG) in the financial year 2017/18. For reporting purposes the assumption was made that the centrally retained amounts and contingencies would be fully spent.
- The Forum was reminded that the de-delegated items funding came from the contribution made by maintained schools and that any underspend therefore belonged to the maintained schools.
- The forecast as at 31 October 2017 showed an overspend of approximately £1.081million, which was an improvement on the September figure due to a reduction in the High Needs Block expenditure of £251,000.
- In response to a query from John Bayes, Coral Miller clarified that column C represented the current forecast.

RESOLVED: That the report be noted.

23 HIGH NEEDS BLOCK

Jane Winterbone provided an update on the High Needs Block.

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

- Drilling down into the High Needs Block, £250,000 had been found.
- Some progress had been made with the clawback from other local authorities around the Northern House top up.
- Jane Winterbone indicated that the Education, Health and Care Plan (EHCP) audit report would be considered by the People Services Leadership Team in the next week. The report was positive and stated that the quality of the EHCPs had improved.
- Jane Winterbone explained that it was important to understand the thresholds and to ensure that pupils were not being transferred to EHCP at too low a level. With regards to the conversion of Statements of Special Educational Need to EHCPs for post 16 pupils, some pupils who had been found to have been transferred at a low level attended mainstream settings and had transferred to college with very little additional help and therefore could have been stepped down through the review process.

- It was noted that a comprehensive service action plan had been produced as a result of the EHCP audit. Recommendations included how the service should be undertaking regular similar audits itself in future.
- The resources base review had been completed. The review had produced a large number of recommendations, including that the banding be reviewed. There was a suggestion that there would be a two phase approach to the banding. It was proposed that a High Needs Block Sub Group work with Finance on the High Needs Block including around the costing of any changes to the banding. Brian Prebble, Jay Blundell, Derren Gray and Ali Brown volunteered to be part of the High Needs Block Sub Group in response to a request from Jane Winterbone. Ginny Rhodes had also previously expressed an interest in participating.
- It was vital to get the commissioning of resource spaces right.
- Jane Winterbone emphasised that there was a definite need to look at some of the gaps which were causing primary school children with ASD in particular to go out of the Borough too early.
- A very thorough review report had been produced and would be taken to the People Services Leadership Team. It was suggested that the summary report be taken to the Forum's January meeting if available. Forum members could request that they be sent the full report should they wish.
- Jane Winterbone commented that in the past there had been similar reviews, the recommendations of which had not been progressed. She had agreed to come back in the new year to take the implementation of the review recommendations forward, making sure that it was agreed which of the recommendations would be taken forward.

RESOLVED: That

- 1) the update be noted;
- 2) a summary of the Resource Bases Review report be brought for consideration at the next meeting of Schools Forum.

24 2018/19 CENTRAL SCHOOL SERVICES BLOCK

The Forum considered a report regarding the 2018/19 Central School Services Block which requested that Schools Forum support the Council's proposals to fund the statutory education functions of the authority for 2018/2019.

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

- Coral Miller advised that the DfE had introduced a new block, the Central School Services Block (CSSB) for 2018/19, to fund local authorities for the statutory duties they held for both maintained schools and academies.
- The CSSB brought together funding previously allocated through the retained duties element of the Education Services Grant (ESG) and funding for ongoing central functions, such as school admissions, which had been previously top-sliced from the Schools Block.
- The DfE provisional allocation for the CSSB block was £922,000, a 2.5% reduction from last year's centrally retained amount.
- The Forum noted the proposed allocation for 2018/19 for the different statutory duties.
- The Forum was advised that the School Admissions budget had reduced and remained challenging.
- Jane Winterbone stated that the Education Welfare Service budget had also reduced. This was an area of concern. Finance colleagues and Shan Ratcliffe, the Virtual

Headteacher, would meet to discuss this. The volume of children in the Borough meant that the delivery of the statutory work around Education Welfare Services was extremely tight. Paul Miller commented that other local authorities would be facing similar pressures and questioned whether benchmarking and sharing of good practice could be carried out. Jane Winterbone commented that the statutory responsibilities were the same regardless of whether the local authority was big or small. Wokingham had previously shared some of its Education Welfare Service function with other authorities. Paul Miller commented that the sharing of resources could be beneficial. It was noted that some of the larger authorities had much bigger trading arms which helped to support the delivery of the statutory duties.

- Jay Blundell asked whether the Virtual School was included and was informed that the Virtual School could not be DSG funded and had to be core funded.
- Coral Miller drew attention to the education services offered to schools such as Educational Psychology, various therapies and health services that had been previously funded by the Education Support Grant. The Council continued to provide these services without funding from the DSG. It was noted that the estimated cost of these services was over £1million.
- Elaine Stewart stated that the £72,000 budget for the Standing Advisory Committees for Religious Education (SACRE) seemed large, and questioned what this was spent on. Jane Winterbone informed the Forum that the SACRE produced an annual report of its work. Paul Miller asked that this be provided to Forum members. Anne Andrews also commented this was a much larger budget than other neighbouring SACREs. Coral Miller commented that this had been allocated to the SACRE budget line previously and agreed to look at this further.

RESOLVED: That the report be noted

25 SPLIT SITE FUNDING

The Forum considered a report regarding Split Site funding in 2018/19 which was set out in Agenda Pages 29 to 30. The Forum was asked to support the Council's proposals to use the split site criteria factor in the 2018/19 school block budget.

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

- A local authority school block funding formula could include a factor to provide additional funding to schools that operated on more than one site.
- The Forum was advised that schools sharing facilities, federated schools and schools with remote sixth forms or remote early years provision were not eligible for split site funding.
- Examples of clear trigger points included the sites being a minimum distance apart, as the crow flies, and the sites being separated by a public highway.
- There had been one application for the split site funding from Charvil Piggott where additional costs had been incurred across two sites. Coral Miller explained that at present the Council supported the school through the growth fund. It was proposed to support the school by providing a lump sum payment based on the DfE national funding formula proposed lump sum of £110,000. This would be funded by removing the growth fund support currently made to the school of approximately £100,000, with the remaining £10,000 funded from the school block budget.
- The transfer from the growth fund to the split site fund would cost the school block £10,000.
- Carol Simpson expressed concern about the possible creation of a precedence and commented that a set of criteria should first be agreed.

- John Bayes commented that Charvil Piggott was clearly a split site and should qualify for split site funding. However, a set of criteria should be developed for any future applications. Paul Miller proposed that Charvil Piggott should qualify for split site funding.

RESOLVED: That

- 1) the proposal be approved;
- 2) split site funding criteria be developed.

26 GROWTH FUND APPROVAL FOR 2018/19

The Forum considered the 2018/19 Growth Fund Criteria Report as set out in Agenda Pages 31 to 34.

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

- The Forum was asked to support the proposal to ‘topslice’ the School Block budget by £800,000 in order to fund the 2018/19 growth fund which existed in order to fund the Council statutory duty to ensure there were sufficient school places in the Borough.
- Coral Miller advised that this was a significant reduction on the 2017/18 ‘topslice’ of £1.3million, increasing the school block allocation to schools by £500,000 in comparison to the current year. Coral explained that this reduction was the result of the tightening up of funding criteria.
- Coral took the Forum through the appendices to the report.
- There was a contingency of approximately £100,000, mainly for bulge classes and classes that were not currently known about.
- Jane Winterbone reminded the Forum that the criteria applied had been previously agreed.
- Elaine Stewart commented that there appeared to be no additional factors added into the monies for growing schools. Jane Winterbone indicated that the criteria related to the basic entitlement money and was always intended to be a stop gap and triggered on the full funding on the census.
- Elaine Stewart expressed concern that the agreed criteria did not make accommodation for pupil led factors funding for schools as they were growing. Sylvia Allen commented that would be difficult to build in.
- Paul Miller suggested that Piers Brunning be asked to ascertain whether some funding could come out of the contingency. He also suggested that the contingency be added to the regular update on contingencies so as to highlight how it was or was not being allocated.

RESOLVED: That the proposal be approved.

27 DRAFT SCHOOL BLOCK BUDGET 2018/19

The Forum received a report which provided an update on the draft 2018/19 budget.

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

- The budget presented was an estimate. The actual budget was expected to be released next week.
- There would be a number of changes to the school block funding from 2017/18 to 2018/19. Previously the actual unit cost per child was the same for both Primary and Secondary; however, in the 2018/19 budget, the DfE had introduced separate

unit costs for Primary and Secondary; the Primary Unit of Funding (PUF) and Secondary Unit of Funding (SUF) and an additional amount for premises which included lump sum, business rates and other premises costs.

- The final funding allocation would be available from 18 December 2017 when the DfE had checked and incorporated the October 2017 census number into the funding calculation.
- Coral Miller took the Forum through Table A which compared the 2017/18 unit cost with the new 2018/19 unit cost and premises allocation. Under the new regulations, at least 99.5% of the amount received through the school block must be allocated to schools and the growth fund.
- Coral Miller would clarify whether the Reception uplift was continuing when the new guidance was issued.
- The changes agreed by the Task and Finish Group and used in setting the budget included;
 - Adjusting the minimum funding guarantee (MFG) to 0% so no school lost funding per pupil from last year. Any positive MFG required an application to the Secretary of State;
 - Reduction in the Lump sum of £25,000 per school;
 - Increase Primary prior attainment to £500;
 - Cap the gains to 3%;
 - Change ratio to 1:1.28.
- In response to a question from Paul Miller, Coral Miller confirmed that a number of models had been considered and the one used had been considered the most appropriate.
- Appendix A detailed the numbers on roll by school. There were a number of reductions in some of the secondary school numbers in particular which would have an impact on individual school funding.
- Appendix B looked at the unit costs after the Minimum Funding Guarantee. This included premises costs as well as pupil led factors. Coral Miller explained that the reason that some schools were losing out on the per pupil factor was that the premises cost was fixed whereas the pupil led factor was variable. The big reduction in unit costs for Bulmershe School for last year was highlighted. Coral Miller clarified that this was because the school's business rates had been overstated in the previous year and was now being claimed back.
- Appendix C detailed the actual amount that the schools were likely to receive. 45 schools would gain whilst 18 would see a reduction.
- Sylvia Allen asked about the 2019/20 budget. Jane Winterbone suggested that the Task and Finish Group look at moving to the second phase towards the national funding formula once the 2018/19 budget was settled. The Chairman thanked the Task and Finish Group and Finance staff for their hard work.

RESOLVED: That the report be noted.

28 CONTINGENCIES UPDATE

The Forum received a report regarding the 2017/18 Contingencies Breakdown. The report detailed how the Council had applied the de-delegated school contingency.

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

- Coral Miller advised that there were now two claims on this funding, both of which had been approved. She provided further detail regarding the case of 'School B.'
- The Forum was notified that £69,510 of contingencies had not yet been committed.

- Jane Winterbone commented that there was unlikely to be other claims on the fund at present.
- In response to a question as to whether the payment would be a grant, Coral Miller confirmed that it would.

RESOLVED: That the report be noted.

29 FORWARD PROGRAMME

The Forum considered the Forward Programme of work and dates of future meetings as set out on Agenda page 49.

The Forum requested a summary of the Education, Health and Care Plan audit report, if available, at the January meeting.

An update from the High Needs Block Task and Finish Group would be provided at the Forum's February meeting.

Lynne Samuel, Senior Finance Specialist, People Services, was introduced to the meeting.

It was noted that the meeting on 17 January 10am would be hosted by Bohunt School.

RESOLVED: That the Forward Programme be noted.

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SCHOOLS FORUM

2017/18 Schools Revenue Monitoring Report January 2018

1 Purpose of the Report

This report provides the Schools Forum with details of the revenue budget position as at 30th November 2017.

2 Suggested Action

The Forum is asked to note the contents.

3 Background

This report shows the expected out-turn for the Dedicated Schools Grant (DSG) in financial year 2017/18. It makes the assumption that the centrally retained amount will be fully spent.

The de-delegated items funding comes from the contribution made by maintained schools and subsequently any underspend belongs to the maintained schools. The underspend will be held for the maintained schools unless the maintained schools vote on having that funding returned back to them when the out-turn is reported in May or July's Schools Forum.

4 Financial Summary

The forecast as at 30th November 2017 shows an overspend of approx. £1.039m. This is an improvement of £42k on that previously reported and reflects a small movement within the High Needs Block.

Please refer to :

Appendix A – Summary of 17/18 school revenue monitoring report,
Appendix B – School budget detail 17/18.

Coral Miller
Interim School Finance Manager
January 2018

John Ogden
Interim Head of Finance
January 2018

Appendix A						
Summary of 1718 school revenue budget monitoring						
INCOME						
Ref	Description	A	B	C	D	E
		Budget	Forecast	Forecast	Last Mth	
		Forecast	October	November	Variance	Variance
		£	£	£	(C - B)	(C - A)
					£	£
	Brought forward school block surplus	(1,356)	(1,356)	(1,356)	-	-
	School block budget is the allocation to school based in the number of children in the school, the areas the children live i.e. rate of deprivation, children on free school meals, school academic achievement etc. This produces a unit cost per child per school and that unit cost is times by the number of children in that school.	(94,864)	(94,864)	(94,864)	-	-
	High needs block funding is for funding Special needs children in all our education establishments this includes commissioned services from other boroughs and independent schools.	(18,944)	(18,944)	(18,944)	-	-
	Early Years Block Allocation including funding for Education of Children under 5s in Private/voluntary/independent settings as well as nursery provision and Primary schools with nursery provision.	(9,546)	(9,286)	(9,286)	-	260
	Sub Total	(124,711)	(124,450)	(124,450)	-	260
	Government specific grant the the LA pass to the schools on behalf of DFE					
	Estimate for other grants like PE grant (actual allocation will be announce nearer October)	(250)	(250)	(250)	-	-
	UIFSM Revenue / Start Up	(2,227)	(2,227)	(2,227)	-	-
	Pupil Premium excl Academies	(2,628)	(2,628)	(2,628)	-	-
	6th form funding from EFA for Secondary school with a 6th form.	(3,258)	(3,258)	(3,258)	-	-
	Sub Total	(8,363)	(8,363)	(8,363)	-	-
	TOTAL INCOME	(133,074)	(132,813)	(132,813)	-	260
	EXPENDITURE					
	Description	£	£	£	£	£
A	Academy Allocated budget	30,675	32,461	32,461	-	1,786
A	School allocated budget	62,053	60,267	60,267	-	(1,786)
F	School block budget - De-delegated items from maintained schools to council for central services like insurance for school, staff cover for maternity in schools etc.	1,723	1,723	1,723	-	-
	Centrally retained activities for both Academies and Maintained schools like school improvement, council statutory duties etc. School admissions, School Forum costs, ESG and Growth fund. Support cost will be funded by the Council for one year only.	1,981	1,981	1,981	-	-
E	Early year excluding grant	9,176	8,916	8,916	-	(260)
E	Centrally retained activities for Early years statutory duties.	370	370	370	-	-
B	Grant allocation to schools	8,363	8,363	8,363	-	-
D	High need grant allocated budget	18,944	19,716	19,674	(42)	730
	Miscellaneous	97	97	97	-	-
	TOTAL EXPENDITURE FORECAST	133,382	133,894	133,852	(42)	470
	Surplus () Deficit +	309	1,081	1,039	(42)	730

APPENDIX B - Schools Budget 2017/2018								
				A	B	C	D	E
Note	Line Ref	S251 line no.	S251 title	Forecast Budget 2017-18	October Forecast 2017-18	November Forecast 2017-18	Variance against C-B changes from last month	Variance against C-A change against the forecasted budget
			TOTAL EXPENDITURE					
A	1	1.0.1	Schools Block Allocation excl Academies net of de-delegated funds including HNB allocations	62,053	60,267	60,267	-	(1,786)
	2	1.7.4	6th form funding from EFA	3,258	3,258	3,258	-	-
A	3	1.8.1	Academy Recoupment from Schools Block	30,675	32,461	32,461	-	1,786
C	4	1.0.1	High needs academy recoupment	1,386	1,386	1,386	-	-
B	5	UIFSM	UIFSM Revenue / Start Up	2,227	2,227	2,227	-	-
D	6	1.0.1.	High Needs Block allocations	6,143	6,896	6,896	-	753
B	7	PPG	Pupil Premium excl Academies	2,420	2,420	2,420	-	-
E	8	1.0.1	Early Years Block Allocation inc exp for Education of Children under 5s in Private/voluntary/independent settings	8,947	8,687	8,687	-	(260)
	9		Sub Total of ISB and PVI allocations	117,109	117,602	117,602	-	493
B	10		PE Grant - Additional school grants	250	250	250	-	-
B	11	1.0.2	Pupil Premium allocated to schools - mainstream	129	129	129	-	-
B	12	1.0.3	Pupil Premium in non-mainstream settings	37	37	37	-	-
E	13		Pupil Premium 3-4 years	42	42	42	-	-
F	14	1.1.2	School-specific contingencies	129	129	129	-	-
G	15		NQT Induction	-	-	-	-	-
E	16	1.3.1	Early Years Contingency - Providers only	229	229	229	-	-
E	17	1.3.1	Early years Centrally Retained for statutory LA duties	370	370	370	-	-
D	18	1.2.1	Provision for pupils with SEN (including assigned resources)	2,517	2,642	2,642	-	125
D	19	1.2.1	Moderating Panels	150	150	180	30	30
D	20	1.2.2	Provision for pupils with SEN, provision not included in line 1.2.1	20	20	20	-	-
D	21	1.2.3	Support for inclusion - HNB	507	507	507	-	-
D	22		Unallocated increase in the HNB special school budget	692	-	-	-	(692)
D	23	1.2.4	Fees for pupils at independent special schools & abroad	6,119	6,778	6,686	(92)	566
D	24	1.2.5	SEN transport	230	230	230	-	-
	25	1.2.7	Inter-authority recoupment	-	-	-	-	-
D	26	1.2.1	Pupil Referral Units	470	470	470	-	-
F	27		Behaviour Support Services	321	321	321	-	-
D	28	1.2.6 and 1.2.7	Education out of school	710	638	658	20	(52)
F	30	1.4.1	Support to under-performing ethnic minority groups and bilingual learners	143	143	143	-	-
	31	1.4.10	Pupil growth/ Infant class sizes	1,300	1,300	1,300	-	-
F	35	1.6.1	insurance	547	547	547	-	-
	36	1.4.2	School admissions	304	304	304	-	-
F	37	1.6.4	Licenses and subscriptions	220	220	220	-	-
	38	1.4.13	Miscellaneous (not more than 0.1% total of net SB)	97	97	97	-	-
	39	1.4.3	Servicing of schools forums	4	4	4	-	-
F	40	1.6.7	Staff Costs - supply cover	362	362	362	-	-
H	42		ESG Services	373	373	373	-	-
			Total Central Expenditure	16,273	16,292	16,250	(42)	(23)
			TOTAL SCHOOLS BUDGET	133,382	133,894	133,852	(42)	470

Note	Line Ref	S251 line no.	S251 title	2017/18 Forecast - Budget	September Forecast 2017-18	November Forecast 2017-18	Variance against B-A	Variance against C-A
			TOTAL INCOME					-
C	44	DSG	Schools Block Allocation includes Academies	(94,864)	(94,864)	(94,864)	-	-
	45		NQT				-	-
C	46	DSG	High Needs Block includes Academies	(18,944)	(18,944)	(18,944)	-	-
E	47	DSG	Early Years Block 3-4 year olds	(9,546)	(9,286)	(9,286)	-	260
			Dedicated schools Grant total	(123,355)	(123,094)	(123,094)	-	260
	48	DFE	Additional School Grants	(250)	(250)	(250)	-	-
	49	DFE	UIFSM Revenue	(2,227)	(2,227)	(2,227)	-	-
	50	EFA	Education Funding Agency 6th Form Funding	(3,258)	(3,258)	(3,258)	-	-
B	51	EFA	Pupil Premium 5-16 years	(2,586)	(2,586)	(2,586)	-	-
E	52	DFE	Pupil Premium 3-4 years	(42)	(42)	(42)	-	-
			TOTAL FUNDING	(131,718)	(131,457)	(131,457)	-	260
								-
J	54	Funding	Variance between the Expenditure and Income (I & E) (surplus)/deficit	1,665	2,437	2,395	(42)	730
	55		Brought Forward (surplus) /Deficit balance	(1,356)	(1,356)	(1,356)	-	-
			ESG services	-				
	56		Total Year-end (surplus)/Deficit	309	1,081	1,039	(42)	730

SCHOOLS FORUM

2017/18 Contingencies Breakdown January 2018

1 Purpose of the Report

This report is to inform the Schools Forum on how the Council has applied the de-delegated school contingency. Any underspend in this area can be carried forward to the next financial year or refunded back (after 2017/18 closedown) to maintained schools and, if applicable, any schools that have converted to Academy in 2017/18.

2 Suggested Actions

The Schools Forum maintained school members are asked to approve the carried forward of any underspends in this funds to the new financial year.

3 Background

The Department for Education (DfE) allow the Council to run specific services for its maintained schools, if the maintained schools require this type of support.

The contingency is managed by Finance with each claim assessed on its merit.

4 Financial Summary

At present there are two claims on this funding, both of which have been approved. The schools involved will be closely monitored to identify any issues or changes that may affect their ability to deliver a balanced budget in future, and support will be provided where required.

Please see the table below:

Description	Amount
Contingency for Maintained schools in financial difficulties	(£129,510)
School A: has had unusual difficulties in staffing which they have been working with Human Resources department for the last 2 years. The issue is beginning to seriously drain the financial resources of the school and affect their viability. A lump sum has been agreed for them to restructure their resources until there is a end to the current situation.	£30,000
School B: May 2016 a middle leader was arrested. The leader was suspended on full pay whilst the investigation proceeded. The charge was actually made in June 2017. Once the school could dismiss this member of staff, a payment in lieu of notice was required and this staff member will be paid up to December 2017.	£30,000

<p>The individual was the highest paid member of staff not on the leadership scale. 20 Month full pay is the cost to the school.</p> <p>To mitigate the financial impact, many staff took on additional work with the Head and Deputy Head teaching classes.</p> <p>The impact of the case also involved additional staff time with HR and legal.</p> <p>The school's carried forward from 16/17 has all been used up on this issue and the school is now going into deficit. This issue is now in the public domain.</p>	
Total amount not yet committed.	(£69,510)

5 Conclusion

The schools' contingency is available to maintained schools as per the school budget guidance published by the Department of Education (DfE).

Please note that this funding belongs to the maintained schools and any underspend will either be returned to the maintained schools budget or carried forward into 2018/19.

Coral Miller
Interim School Finance Manager
January 2018

John Ogden
Interim Head of Finance
January 2018

SCHOOLS FORUM

Early Years' Contingency January 2018

1 Purpose of the Report

This report provides the Schools Forum with further details of the Early Years' contingency listed on the monthly Revenue Monitoring Report.

2 Recommendations

The Schools Forum is asked to note the content.

3 Background

Since its introduction in April 2017, the Early Years' National Funding Formula (EYNFF) has set the hourly funding rates that each local authority is paid to deliver the universal, and additional entitlements, for three and four year olds.

Local authorities are required, from 2018-19 onwards, **to pass 95%** of their three and four year old funding from Government onto Early Years' providers. However WBC has in 2017-18 passported 96% of the funding on to their providers.

This pass-through requirement ensures that the vast majority of Government funding reaches providers so that they can deliver the free entitlements.

The '95%' includes the following budgets:

- base rate funding for all providers;
- supplements for all providers;
- lump sum funding for Maintained Nursery Supplement (MNS);
- the top-up grant element of SEN Inclusion Funds paid to providers; and
- **contingency funding.**

Extract from the Department of Education (DfE), Early Years operation guidance 2018-19, November 2017.

4 Financial Summary

The 2017-18 contingency of £229,000, which has not changed for several years, is more appropriately described as a Providers Reserve Fund. The DfE recommends that the Council holds an allocation of funds for future growth in numbers. This fund represents a provision for growth of 93 children a year at £2,462 per year (15 hours for 38 weeks of the year, at an average hourly rate of £4.32).

The funding for each Early Years' provider is based on the May, October and January census and the funding is therefore adjusted 3 times a year to reflect any changes in provider numbers as per each census.

To ensure providers can plan their budget for the new financial year, hourly rates and the Early Years' budget needs to be set by the end of February. The contingency funding therefore also helps to fund any negative budget adjustments that the DfE might make in July when they finalise the budget using the January census information.

To fully assess how much of the contingency has been used for the current year it is therefore important to consider the number of families that have taken up their free entitlement on all 3 census, May 2017, October 2017 and January 2018.

From September 2017 the Government introduced the 30 hour free entitlement for working parents. The October 2017 and January 2018 census are therefore particularly key for the 2017-18 financial year in giving the Council an indication of how many working parents have taken up this offer and the growth to be funded.

Based on the adjustments that were required following the October census, and assuming a pro-rata trend for the spring term, then figures project that the full contingency will not be utilised in year. However, until the January census information is available the final position for the financial year will not be known.

5 **Summary**

The DfE encourages local authorities to have a contingency within the minimum amount of 95% for providers to cope with growth.

January estimated census will be available from early February 2018 and this will inform a provisional out-turn on the Early Years' budget for the 2017-18 financial year, and a full assessment of the level of contingency that has been required to fund growth in-year. This will be reported to Forum in February.

This contingency can only be given to providers and cannot be spent on any other service outwith the minimum 95% funding threshold. The final use of the contingency held will therefore be reviewed to ensure that in 2017-18 at least 95% has been allocated to providers, identifying options where any shortfall exists.

The provisional 2017-18 outturn and proposed 2018-19 budget, including centrally retained element, will be presented to Forum in February.

Coral Miller
Interim School Finance Manager
January 2018

John Ogden
Head of Finance
January 2018

SCHOOLS FORUM

2018/19 High Need Block Consultation January 2018

1 **Purpose of the Report**

This report is to consult the Schools Forum on how the Council will allocate the High Needs Block budget (HNB).

2 **Suggested Actions**

The Schools Forum are asked to comment on the proposal.

3 **Background**

Extract from the DfE High Need Block Guidance

“High needs funding is provided to local authorities through the High Needs Block of the Dedicated Schools Grant (DSG), and local authorities must spend that funding in line with the associated conditions of the grant, and the School and Early Years Finance (England) Regulations. High needs funding is also provided directly to some institutions by the Education and Skills Funding Agency (ESFA).

The high needs funding system supports provision for children and young people with special educational needs and disabilities (SEND) from their early years to age 25, enabling both local authorities and providers to meet their statutory duties under the Children and Families Act 2014. High needs funding is also intended to support good quality AP for pre-16 pupils who cannot receive education in schools.

Financial year 2018/19 marks the introduction of national funding formulae for schools, high needs and central school services. The final national funding formulae for 2018/19 and 2019/20 have been confirmed, alongside the analysis of responses to the national funding formulae consultations and government’s conclusions. These formulae will be used to calculate the blocks within the DSG that are allocated to local authorities”.

4 **Financial Summary**

Please see Appendix A which reports the proposed allocation of the £18.58m of the 2018/19 High Needs Block Budget together with a comparison to the 17/18 budget and projected outturn.

APPENDIX A				
SUMMARY				
2018-19 High Needs Block Budget				
	A	B	B	C
			November	
	£	£	£	£
	2016-17	2017-18	2017-18	2018-19
	£000	£000	£000	£000
	Out-turn	Budget	Forecast	Budget
INCOME				
2017-18 DSG allocation	16,900	17,558	17,558	16,697
Transfer from the school block (0.5% half a percent)	0	0	0	498
Academy Place funding	808	1,386	1,386	1,386
Total Funding from the DFE for the HNB	17,708	18,944	18,944	18,580
EXPENDITURE				
Expenditure no longer required due to 18-19 funding changes	0	0	0	-264
Funding given to the Academies directly from WBC HNB	0	1,386	1,386	1,386
Funding given to the Academies directly from WBC HNB 16-17	808	0	0	0
RESOURCE BASES - MAINTAINED				
Place funding - Resource bases	669	750	750	750
Top up funding - Resource bases	139	202	252	202
	1,617	952	1,002	952
The Oaks	200	200	200	285
Various top - up				
MAINTAINED STATEMENTED (ehc) initial allocation	532	697	942	942
Wokingham Academies (ehc) initial allocation	291	297	255	297
Additional funding for full year	240	247	240	247
Special school allocation - Addlington and Northern House	5,704	5,313	4,951	4,862
PRU	470	470	470	470
INDEPENDENT SPECIAL SCHOOL	6,155	6,619	6,778	6,442
CENTRALLY RETAINED				
Out of Borough topups	878	617	793	617
Post 16 top ups	0	615	814	615
Sensory Impairment	235	235	235	235
ABA Programme	55	55	55	55

Education out of school	638	720	638	638
SEN staffing support	18	20	20	20
Moderating Panels	183	150	200	150
Support for inclusion	401	507	507	401
SEN Transport	230	230	230	230
	2,638	3,149	3,492	2,961
TOTAL I & E	17,847	19,330	19,715	18,580
Variance against budget	139	385	771	0

5 Conclusion

Pressures on the HNB in recent years are partly explained by the increase in the number of pupils in the SEND cohort, including those who have an EHCP. There are also additional costs being incurred due to a lack of suitable local provision for some pupils resulting in out of borough placements. This pressure is unlikely to reduce in the short term.

Coral Miller
Interim School Finance Manager
January 2018

John Ogden
Interim Head of Finance
January 2018

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SCHOOLS FORUM

2018/19 School Block Consultation January 2018

1 Purpose of the Report

This report is to consult the Schools Forum on the Wokingham Schools' view of the changes in the School Block factors for 2018/19, following the close of the consultation jointly set by the Council and the School Task and Finish Group.

2 Suggested Actions

The Schools Forum is asked to note and comment on the outcome from the schools consultation on the changes to the School Block factors for 2018/19.

3 Background

Due to the many changes from 2017/18 to 2018/19 the Council set up a Task and Finish Group (T&F) to support the Council in setting a fair budget for 2018/19. The T&F Group members are a Primary Head Teacher, a Secondary Head Teacher, School Business Managers, Interim Director of Children Services and Wokingham Borough Council (WBC) Senior Finance specialists.

This Group looked at various different financial models and options in determining how much to allocate through the various factors in the formula. The aim was to deliver a strategic decision on how funding is distributed to the schools while moving closer to the National Funding Formula (NFF). This is in line with the Government expectation that Local Authorities (LA) move closer to the NFF over the 2 years that the Council will remain responsible for setting school budgets.

With this in mind, the changes made aim to set a budget that would minimise the losses to schools and to recognise that some schools in WBC have had reductions in funding year on year due to the Minimum Funding Guarantee (MFG).

Please see the following changes:

No.	Description - changes	17-18 budget	18-19 budget	NFF	Comment
1.	Primary Prior attainment	226.07	500	1,050	Moving toward NFF
2.	Lump sum reduction	175,000	150,000	110,000	Moving toward NFF
3.	Capping	0%	3%	3%	Move to the NFF
4.	Minimum Funding Guarantee	-1.5%	0%	0% to -1.5%	To stop any school losing funding per pupil
5.	Primary & Secondary Ratio adjustment	1:1.27	1:1.28	1:1.29	Moving toward the NFF

4 **Financial Summary**

Please see Appendix A consultation document on pages 9 to 11.

Please see Appendix B the response to the consultation.

5 **Conclusion**

The Department of Education (DFE) regulations says that any changes to the funding formula needs to be consulted with all Schools, Academies and the Schools Forum. The LA is complying with it's obligation to ensure all schools have a say on the changes make and Schools Forum and LA considers those views. .

Coral Miller
Interim School Finance Manager
January 2018

John Ogden
Interim Head of Finance
January 2018

School Funding Reform Consultation Dec 2017

This report was generated on 05/01/18. Overall 18 respondents completed this questionnaire. The report has been filtered to show the responses for 'All Respondents'.

The following charts are restricted to the top 12 codes. Lists are restricted to the most recent 100 rows.

Do you agree with the Task and Finish (T&F) Group's proposal to increase the Primary Prior attainment?



Please provide any comments you have on this issue

KS1 colleagues will need to be held to account in their assessments, particularly for the sake of junior schools who may not agree with their assessments.

Do you agree with the T&F Group's proposal to reduce the lump sum in order to phase in the NFF changes over two years?



Please provide any comments you have on this issue

The two year phase being inevitable, a gradual move toward it is best.

Do you agree with capping the schools gains at 3%, which means after pupil numbers are reflected, no school on their pupil led factors can have an increased of more than 3%?



Please provide any comments you have on this issue

There may need to be conditions for special circumstances that may as yet be unforeseen.

All other measures apart from capping and MFG have been done effectively by a third of the change so why wasnt capping also changed by a third

However I believe that after the funding calculations I do not believe that adjustments to protect schools with a falling roll due to circumstances beyond thier control have been taken into account . The issues of falling roll have not been addressed by WBC over many years, and in particular my school, impacted by the opening of Bohunt, over capacity in the scondary system and slower growth in secondary numbers this issue has not been addressed again , and should be.

Do you agree with changing the Minimum Funding Guarantee from - 1.5% to 0% which means that no school will receive a reduction in their Pupil Led Factors against last year's MFG pupil unit cost?



Do you agree with changing the Primary to Secondary ratio to move closer to the NFF ratio?



Please provide any comment you have on this issue

Only on the basis of the move toward NFF being gradual, if it is inevitable.

There doesnt seem to be a choice.

About you (Which school do you represent?)

Shinfield St Mary's CE Junior School

Robert Piggott CE Infant School

Robert Piggott CE Infant School

Robert Piggott CE Junior School

Robert Piggott CE Junior School

Radstock Primary School

Polehampton CE Junior School

Highwood Primary School

Woodley CE Primary School

Polehampton C of E Infant School

Hawkedon Primary School

Loddon Primary School

Oakbank Secondary Free School

The Emmbrook

About you (What is your job title?)

Headteacher

Business Manager

Executive Headteacher

Business Manager

Executive Headteacher

Headteacher - makes it obvious who responded!

Headteacher

Headteacher

School Business Manager

Finance Officer

School Business Manager

SBM

Principal

Chair of the Governing Body

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SCHOOLS FORUM

2018/19 De-delegated budget January 2018

1 Purpose of the Report

This report is to seek approval from the maintained primary schools and maintained secondary schools for each proposed de-delegated item.

2 Suggested Actions

The Schools' Forum maintained school members are asked to approve the proposal.

3 Background

De-delegated services are for maintained schools only; 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.

The services which are allowed to be de-delegated and are proposed to be de-delegated are as follows:

- **Contingencies** (including schools in financial difficulties and deficits of closing schools).
- **Behaviour support services**, service commissioned from Foundry for primary maintained schools.
- **Support to underperforming** ethnic groups and bilingual learner. **See Appendix A**
- **Staff costs supply cover** (for example, long-term sickness, maternity, trade union and public duties)
- **Licences and Subscriptions:** Please see below Extract from the December 2017 DSG technical Guidance:

“National copyright licences

DfE has agreed with the following agencies to purchase a single national licence managed by DfE for all state funded schools in England:

Christian Copyright Licensing International (CCLI)

Copyright Licensing Agency (CLA)

Education Recording Agency (ERA)

Filmbank Distributors Ltd. (for the PVSL)

Mechanical Copyright Protection Society (MCPS)

Motion Picture Licensing Company (MPLC)

Newspaper Licensing Authority (NLA)

Performing Rights Society (PRS)

Phonographic Performance Limited (PPL)

Schools Printed Music Licence (SPML)

This means that local authorities and schools will no longer need to negotiate individual licences. There will be savings both in administration and in the overall cost of the licence. DfE will pay the cost, including VAT, to the agencies and will provide this as a service to local authorities at a charge.

This means that local authorities can continue to reclaim VAT on the licences as they do now. These arrangements will cover academies as well as maintained schools, and we will allow local authorities to hold this money centrally rather than include it in school budgets. Also I.T. licences for maintained school only like Capita licences etc.

Please See Table A.

- **Insurance.** Budget for maintained school only. Academies have indemnity rather than insurance which is underwritten by the taxpayer. The DfE doesn't allow Maintained Schools to be part of that scheme, therefore the council has to go out into the general market to private companies for it's insurance cover.

Due to the amount of insurance the council commissions, they do receive favourable rates which may be difficult for schools to receive if they went out to the general market themselves. If schools source their own insurance, the council will need to approve the cover as it needs to be at an acceptable level to mitigate any risks for the council.

For the total charge please see Table B.

4 Financial Summary

The de-delegated budget provision for 2018-19 financial year is as follows:

Table A

Revised calculation of the Licences and Subscription to acknowledge that the charge from the DfE includes Academies which the WBC will invoice Academies for this charge. This led to a reduction from last year of £774.

Charge for National Copyright Licences	Commercial in Confidence										
	CLA	SPML	NLA	ERA	PVSL	MPLC	PPL	PRS	MCPS	CCLI	Total
Wokingham	42,094	9,859	860	15,222	7,388	4,828	8,326	8,753	14,911	10,078	122,318
For all Schools and Academies											
Number of Schools and Academies											64
Charge per school and academies											1,911.22
Number of maintained schools											45
Charges to Maintained school only											86,004.89
Other Licences Maintained only											68,000.00
											154,004.89
New unit cost for 2018-19 (maintained only)											3,422.33

Table B

This shows how the de-delegated is calculated.

DE-DELEGATED 2018-19 BUDGET							
De-delegated services to maintained school only							
School Name	Contingency (school in fin. Diff and def. of closing schools)	Insurance	Licences/subscriptions*	Staff costs - supply cover	Support to underperforming EMG & bilingual learners	Behaviour support services - Primary only	Total
Cost per school							
Primary	2,491	10,528	3,422	6,962	2,755	6,551	32,709
Secondary	2,491	10,528	3,422	6,962	2,755		26,158
Total Allocation	112,076	473,774	154,005	313,302	123,962	275,143	1,452,261
						ck	1,452,261

5 Conclusions

The de-delegated services support maintained schools, some services are mandatory such as Licences and Insurance.

Coral Miller
Interim School Finance Manager
January 2018

John Ogden
Head of Finance
January 2018

Item 36 - Appendix A

Ethnic Minority Achievement funding

The funding currently supports a well-regarded and strong service, which works with schools to develop provision and improve outcomes for pupils learning EAL, pupils from minority ethnic backgrounds, and disadvantaged pupils.

The de-delegation and central use of this funding enables:

- **The LA Teaching and Learning Adviser to support schools to diminish differences for disadvantaged children, children learning EAL and those from minority ethnic groups.** Support includes:
 - Training courses and termly network meetings for EAL and pupil premium, and input to Headteacher briefings, 'Getting to Good' meetings, SENCO and early years network meetings.
 - In-school support for EAL and pupil premium, including: support for pupil premium leaders and EAL co-ordinators; support for teaching assistants who champion pupil premium children and who support EAL pupils; staff meetings on EAL and pupil premium; pupil premium reviews; and EAL surgeries.
 - General advice and guidance via email/ telephone and access to guidance and resources on the Wokingham Schools Hub for EAL and pupil premium. The EAL pages on the Wokingham Schools Hub are some of the most visited pages on the website.
 - Other school improvement projects, for example current partnership work with the secondary federation and primary Headteacher association to support schools to strengthen KS2-3 transition. Transition network meetings held this academic year are facilitating the sharing of units of work and good practice, and leading to borough-wide projects.

The funding enables the LA to provide all pupil premium support free of charge to schools, and EAL training and support free of charge to maintained schools.

Feedback on support provided to schools is extremely positive. Pupil premium network meetings are particularly well attended and well received. 30 Wokingham schools were represented at the last meeting. Ideas shared at pupil premium network meetings have been widely adopted by schools, for example, the '5 a day' initiative and the concept of 'tilt'. Comments from feedback forms from recent meetings include:

'Very inspiring'

'Idea of 'tilt' useful – will share with colleagues and ask teachers to think about.'

'Will have a PP focus in all staff meetings'

'I will double the length of my planned PP staff meeting to incorporate all the ideas I have gained.'

A pupil premium 'Ideas Exchange' event for secondary schools has been held for the last two years, in partnership with Wellington College. These events have been attended by almost all secondary schools and have been very well received:

'Extremely interesting and very thought provoking'
'Excellent event for networking and sharing'
'Gained good ideas I can take back to school'

Feedback comments on other courses and staff meetings include:

A very informative and useful session.

Great training. Lots of useful resources.

I will use the Racing to English resources to support new arrivals.

I will create time for teachers to have 1-1 discussions with PP children in their class.

Pupil premium will be on the agenda at all FGB meetings.

Other feedback from staff who have received support includes:

'Emily has been a massive support in my first year as PP leader for my school. She has helped me to develop the leadership of such an important area in our school. It really helped me when she came on a learning walk with me in school. I feel far more confident about doing this by myself now.' (Teacher, June 2017)

'A clear lead on good practice for improving the performance of pupil premium children.' (Headteacher, June 2017)

Outcomes for PP pupils have improved in many of the schools provided with PP support. Recent Ofsted inspection reports include many positive comments about provision and outcomes for disadvantaged children. For example:

'Additional funding is used very well and disadvantaged pupils catch up quickly because of well-judged support.'

'Disadvantaged pupils make faster progress than at the time of the previous inspection and achieve increasingly well in all year groups as a result.'

The model of PP Champions developed in the borough has been cited as good practice in Ofsted reports:

'Teaching assistants support learners well. ... Many act as champions for individual learners, ...keeping a sharp oversight in lessons to make sure pupils have understood and make good progress.'

- **The two LA Bilingual Teaching Assistants to support newly arrived Polish and Arabic speaking pupils in maintained schools.** The Bilingual Teaching Assistants are in great demand, and schools have reported on the huge impact that their support has had for pupils who are at the early stages of learning EAL. Feedback from schools includes:

'The TA has produced a great number of resources...she has been a godsend.'

'Support during Literacy lessons ensured that L's grasp of the language developed very quickly. The TA made a tremendous impact on L's ability to access the national curriculum.'

Pupils supported by the TAs make good progress in 'catching up' with their native English speaking peers and have achieved well in KS2 tests/ GCSE exams relative to the length of time they have been learning English. As well as impacting on children's

learning, feedback from schools indicates that the TAs have a significant impact on children's social interactions and emotional well-being. They also have an impact on the school staff that they work with, and on the resources available in school, which children continue to benefit from after their support has ended.

- **The LA to provide schools with funding to support the most vulnerable pupils with EAL, those who are newly arrived in the UK.** During the academic year 2016-17, funding was provided to 31 maintained schools for 167 newly arrived children. The funding enables schools to provide 20 hours of TA support and to buy dual language books and bilingual dictionaries. Because admission of new arrivals is unpredictable, it would be difficult for schools to budget to support such pupils if the funding was not de-delegated.
- **The provision of support to secondary schools from a specialist consultant with entering students for GCSEs in their first languages.** The initiative to encourage EAL students to take GCSEs in their home language has been welcomed by schools and has continued to grow since support was first offered, with increasing numbers of students with different languages being entered each year. Excellent results have been achieved. 58 students were entered by Wokingham secondary schools for GCSEs in their home language in summer 2017. 56 of the students achieved C+ grades, and 46 (79%) achieved A or A* grades. Similar results have been achieved in previous years. The cohort in 2017, as in previous years, included EAL students with SEN, low prior attainment, and students who joined their schools in Years 10 or 11 and who were at the early stages of learning English. The strong grades are likely to have been particularly important for these students. School staff are supported to understand the requirements of the exams and how to help students to prepare, and speakers of the languages are sourced to conduct the oral exams.

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SCHOOLS FORUM

2018/19 Split Sites Criteria January 2018

1 **Purpose of the Report**

This report is to ask the Schools Forum to support the Council's proposals to use the Split Site criteria factor in the 2018/19 School Block Budget.

2 **Recommendations**

The Schools Forum are asked to consider and approve the proposal.

3 **Background**

A local authority School Block Funding Formula can include a factor to provide additional funding to schools that operate on more than one site.

- Criteria for providing extra funding should be clear and transparent, incorporating clear and objective trigger points, and a clear formula for allocating additional funding.
- All schools and academies that meet the criteria will be eligible for split site funding.
- Schools sharing facilities, federated schools and schools with remote sixth forms, or remote early years provision, are not eligible for split site funding.

Examples of clear trigger points are (extract from the DfE summer guidance):

- the sites are a minimum distance apart, as the crow flies, and the sites are separated by a public highway.
- the provision on the additional site does not qualify for an individual school budget share through the DSG.
- the school has remote playing fields, separated from the school by a minimum distance, and there is no safe walking route for the pupils.
- a percentage of staff are required to teach on both sites on a daily basis, to support the principle of a whole school policy, and to maintain the integrity of the delivery of the national curriculum.
- a minimum percentage of pupils are taught on each site on a daily basis.

Examples of a clear formula for funding schools with split sites are:

- a lump sum payment
- a per-pupil rate
- a rate per square metre of the additional site

Values for primary and secondary schools may be different. There may be one rate of payment for the first additional site, and a separate rate for each additional site. Payment rates may be stepped, for example as the distance between sites increases.

4 The Wokingham Borough Council Split Site Criteria

The Council is proposing a set of 5 criteria to assess any school or academy who applies for this funding. The applying school will be required to meet the first criteria and then 2 from the other 4 before being considered for split site funding.

Must meet:

1. The provision on the additional site does not qualify for an individual school budget share through the DSG.

Then must meet 2 from the following 4:

2. The sites have to be at least 2 miles or 3.219 kilometers apart, as the crow flies, and the sites are separated by a public highway i.e an A or B road.
3. The school or academy has to demonstrate that they have increased leadership and administration costs due to having 2 sites, i.e. 2 Headteachers, 2 receptionists etc.
4. At least 20% of staff are required to teach on both sites on a daily basis, to support the principle of a whole school policy, and to maintain the integrity of the delivery of the national curriculum.
5. At least a minimum of 20% of pupils are taught on each site on a daily basis.

5 Financial Summary

Where a school or academy meets the criteria as described above, a lump sum will be provided at the DfE preferred National Funding Formula lump sum rate of £110k.

6 Summary

There has been one application for this funding from Charvil Piggott where additional costs have been incurred by having two sites.

Coral Miller
Interim School Finance Manager
January 2018

John Ogden
Interim Head of Finance
January 2018

SCHOOLS FORUM

2018/19 School Block Budget January 2018

1 **Purpose of the Report**

This report is for information only and provides School Forum members an update to the draft 2018/19 budget presented in December, reflecting the proposed final School Block Budget for 2018/19.

2 **Recommendations**

The Forum is asked to note the contents of this report.

3 **Background**

The Department for Education (DfE), on 19th December provided the Local Authority (LA) with the Dedicated Schools Grant (DSG) which provides funding for all school blocks. The block funding contains the School Block funding, High Needs funding, the Early Years funding and the Central Schools Block funding.

The actual unit cost per child was previously the same for both Primary and Secondary however, in the 18/19 budget, the DfE has introduced separate unit costs for Primary and Secondary referred to as the Primary Unit of Funding (PUF) and Secondary Unit of Funding (SUF) and an additional amount for premises which includes lump sum, business rates and other premises costs.

4 **Financial Summary**

The following appendices compares last years budget, the draft school budget and the proposed final school budget.

Appendix A shows the changes in the numbers on roll between the draft budget, final budget and last year budget.

Appendix B shows the changes in the unit cost per pupil from the final budget to the draft budget.

Appendix C shows the changes in the 2018-19 final proposed schools budget against the draft budget and last year budget.

5 **Summary**

This is the School Block Budget that is due to be submitted to the Department of Education (DfE) by 19th January 2018.

Coral Miller
Interim School Finance Manager
January 2018

John Ogden
Interim Head of Finance
January 2018

APPENDIX A
Number On Roll

School Name	A	B	C	Variance between Draft & Final (A-B)	Variance From last yr (A-C)
	Final 18-19	Draft 18-19	Last Yr 17-18		
Aldryngton Primary School	316	316	316	0	0
All Saints C.E. (Aided) Primary School	272	270	234	2	38
Bearwood Primary School	255	256	260	-1	-5
Beechwood Primary School	358	358	319	0	39
Bohunt Wokingham	523	523	250	0	273
Crazies Hill C. E. Primary School	92	92	97	0	-5
Emmbrook Infant School	180	180	169	0	11
Emmbrook Junior School	247	247	241	0	6
Evendons Primary Free School	307	306	250	1	58
Farley Hill Primary School	204	206	190	-2	14
Finchampstead Primary School	114	114	116	0	-2
Floreat Montague Park	91	91	30	0	60
Floreat Silver Meadow	18	18	18	0	0
Gorse Ride Infant School	162	166	152	-4	10
Gorse Ride Junior School	244	244	241	0	3
Grazeley Parochial Primary School	169	169	155	0	14
Hatch Ride Primary School	201	201	211	0	-10
HAWKEDON PRIMARY SCHOOL	625	625	628	0	-3
Highwood Primary School	235	236	190	-1	45
Hillside Primary School	418	418	419	0	-1
Keep Hatch Primary School	397	397	411	0	-14
Lambs Lane Primary School	219	220	216	-1	3
Loddon Primary School	502	500	465	2	37
MAIDEN ERLEGH SCHOOL	1378	1,378	1,386	0	-8
Nine Mile Ride Primary School	336	337	349	-1	-13
Oakbank	480	480	419	0	61
Oaklands Infant	172	172	178	0	-6
OAKLANDS JUNIOR SCHOOL	246	246	247	0	-1
Polehampton C E Junior School	238	238	239	0	-1
Polehampton C of E Infant School	179	181	181	-2	-2
Radstock Primary School	421	421	420	0	1
Rivermead Primary School	401	400	401	1	0
Robert Piggott CE Infant School	122	122	119	0	3
Robert Piggott CE Jnr School	174	174	172	0	2
Shinfield Infant & Nursery Sch	267	268	270	-1	-3

Shinfield St. Mary's CE (VA) Junior School	320	320	268	0	52
Sonning Church of England Primary School	207	207	210	0	-3
South Lake Primary School	418	418	419	0	-1
ST CRISPIN'S SCHOOL	940	940	922	0	18
St Dominic Savio Catholic Schl	418	419	398	-1	20
St Paul's C of E Junior School	382	382	382	0	0
ST PETER'S CE PRIMARY SCHOOL	487	486	481	1	6
St Sebastians CE Primary Sch	153	150	142	3	11
St Teresa's Catholic Primary School	311	311	313	0	-2
St. Nicholas C.of E. Primary	137	137	139	0	-2
THE BULMERSHE SCHOOL	846	846	771	0	75
The Colleton Primary School	383	381	364	2	19
The Coombes C of E Primary	400	397	475	3	-75
The Emmbrook School	755	755	807	0	-52
The Forest School	780	780	897	0	-117
The Hawthorns Primary School	421	421	440	0	-19
The Holt School	1032	1,032	1,021	0	11
The Piggott School	1147	1,147	1,104	0	43
Waingels College	1069	1,069	1,106	0	-37
Walter Infant School	265	266	269	-1	-4
Wescott Infant School	166	167	160	-1	6
Westende Junior School	239	239	225	0	14
Wheatfield Primary School	135	136	109	-1	26
Whiteknights Primary School	408	408	418	0	-10
Willow Bank Infant School	177	176	179	1	-2
Willow Bank Junior School	236	236	235	0	1
Windmill Primary School	153	158	128	-5	24
WINNERSH PRIMARY SCHOOL	463	464	452	-1	11
Woodley CE Primary School	313	313	311	0	2
Total	23,722	23,729	23,102	-7	619

APPENDIX B

2018/19 to 2018/19 Comparision the draft budget against the final budget variance

		Incl split site		
LAESTA B	School Name	Draft 18-19 Post MFG per pupil Budget	FINAL 18-19 Post MFG per pupil Budget	VARIANC E 18-19 Post MFG per pupil Budget
8722062	OAKLANDS JUNIOR SCHOOL	3,755	3,711	-45
8722067	Nine Mile Ride Primary School	3,598	3,588	-10
8722088	Farley Hill Primary School	3,801	3,801	0
8722089	Lambs Lane Primary School	3,957	3,957	0
8722100	Bearwood Primary School	4,139	4,139	0
8722101	Wescott Infant School	4,112	4,112	0
8722105	Whiteknights Primary School	3,800	3,771	-29
8722106	Keep Hatch Primary School	3,601	3,605	4
8722116	Aldryngton Primary School	3,585	3,591	6
8722121	Emmbrook Infant School	4,179	4,179	0
8722130	Emmbrook Junior School	3,811	3,795	-16
8722132	Oaklands Infant	4,039	3,994	-45
8722137	Walter Infant School	3,791	3,741	-51
8722146	WINNERSH PRIMARY SCHOOL	3,465	3,465	0
8722148	Gorse Ride Junior School	3,850	3,839	-11
8722149	The Colleton Primary School	3,563	3,563	0
8722157	Shinfield Infant & Nursery Sch	4,130	4,130	0
8722160	Willow Bank Infant School	3,950	3,950	0
8722161	Willow Bank Junior School	3,794	3,767	-27
8722163	Hatch Ride Primary School	3,908	3,827	-81

8722167	Rivermead Primary School	3,517	3,517	0
8722184	Westende Junior School	3,846	3,847	1
8722227	The Hawthorns Primary School	3,446	3,468	21
8722232	Gorse Ride Infant School	4,257	4,257	0
8722235	Radstock Primary School	3,508	3,514	6
8722237	HAWKEDON PRIMARY SCHOOL	3,404	3,404	0
8722238	Hillside Primary School	3,651	3,599	-53
8722245	Beechwood Primary School	3,635	3,635	0
8722246	Highwood Primary School	4,353	4,353	0
8722247	South Lake Primary School	3,518	3,529	12
8723037	St. Nicholas C.of E. Primary	4,320	4,319	-2
8723041	Shinfield St. Mary's CE (VA) Junior School	3,822	3,822	0
8723046	Polehampton C of E Infant School	4,044	4,044	0
8723048	Crazies Hill C. E. Primary School	4,978	4,978	0
8723055	St Paul's C of E Junior School	3,550	3,550	0
8723056	Woodley CE Primary School	3,696	3,695	-1
8723057	Robert Piggott CE Infant School	4,361	4,361	0
8723061	Robert Piggott CE Jnr School	4,031	4,040	9
8723312	ST PETER'S CE PRIMARY SCHOOL	3,450	3,464	14
8723315	Finchampstead Primary School	4,430	4,430	0
8723319	Grazeley Parochial Primary School	4,396	4,396	0
8723320	Sonning Church of England Primary School	3,790	3,802	12
8723330	St Sebastians CE Primary Sch	4,608	4,608	0
8723341	St Teresa's Catholic Primary School	3,550	3,560	10
8723368	St Dominic Savio Catholic Schl	3,491	3,487	-4
8723370	Polehampton C E Junior School	3,791	3,798	7
8723371	Loddon Primary School	3,401	3,403	2

8723372	All Saints C.E. (Aided) Primary School	4,496	4,496	0
8722006	The Coombes C of E Primary	3,484	3,536	52
8724048	ST CRISPIN'S SCHOOL	4,817	4,810	-7
8724049	The Emmbrook School	4,915	4,899	-15
8724051	THE BULMERSHE SCHOOL	5,046	5,036	-10
8722000	Windmill	4,611	4,612	1
8722001	Wheatfield Primary School	4,453	4,454	1
8722002	Evendons Primary Free School	3,511	3,532	21
8722003	Floreat Montague Park Primary School	5,697	6,080	383
8724000	Oakbank	5,260	5,302	42
8724001	Bohunt School Wokingham	4,949	4,968	19
8724047	The Holt School	4,553	4,561	7
8724050	The Forest School	4,813	4,813	-0
8724053	MAIDEN ERLEGH SCHOOL	4,581	4,576	-5
8724060	Waingels College	4,714	4,715	1
8724505	The Piggott School	4,417	4,417	-0
8722004	Floreat Silver Meadow Primary School	11,949	11,933	-16

APPENDIX C

2018/19 to 2017/18 Comparison Table

Primary:Secondary ratio		1:1.28	1:1.28	1:1.27		
		A	B	C		
		2018-19	2018-19	2017-18		
School Name	Changes in the number on roll	Final 2018-19 Budget incl SPLIT SITE	Draft 2018-19 Budget	Final 2017-18 Budget	Variance between A - B Final against Draft)	Variance between A - C (Final against last year)
Total		98,245,062	98,248,786	94,451,303	-3,724	
Gainer						
Aldryngton Primary School	0	1,134,663	1,132,783	1,112,076	1,881	22,587
All Saints C.E. (Aided) Primary School	38	1,213,888	1,213,888	1,072,793	0	141,096
Beechwood Primary School	39	1,301,380	1,301,380	1,176,238	0	125,143
Bohunt Wokingham	273	2,598,403	2,588,446	1,312,555	9,957	1,285,847
Emmbrook Infant School	11	752,164	752,164	714,091	0	38,074
Emmbrook Junior School	6	937,358	941,342	900,026	-3,984	37,332
Evendons Primary Free School	58	1,081,412	1,074,906	896,564	6,506	184,848
Farley Hill Primary School	14	775,492	775,492	727,458	0	48,034
Floreat Montague Park	60	544,168	515,572	276,180	28,597	267,988
Gorse Ride Infant School	10	689,645	689,645	643,537	0	46,107
Gorse Ride Junior School	3	936,733	939,435	911,706	-2,702	25,027
Grazeley Parochial Primary School	14	742,853	742,853	690,458	0	52,394
HAWKEDON PRIMARY SCHOOL	-3	2,127,341	2,127,341	2,078,014	0	49,328
Highwood Primary School	45	1,022,910	1,022,910	854,871	0	168,039
Lambs Lane Primary School	3	866,549	866,549	853,948	0	12,601
Loddon Primary School	37	1,701,347	1,700,494	1,551,558	853	149,789
MAIDEN ERLEGH SCHOOL	-8	6,306,183	6,313,182	6,176,557	-6,999	129,626
Oakbank	61	2,545,118	2,524,932	2,177,544	20,186	367,574
OAKLANDS JUNIOR SCHOOL	-1	912,874	923,834	909,912	-10,960	2,962
Polehampton C E Junior School	-1	903,958	902,282	883,506	1,676	20,452
Radstock Primary School	1	1,479,308	1,476,977	1,438,481	2,331	40,827
Robert Piggott CE Infant School	3	532,024	532,024	522,516	0	9,508
Robert Piggott CE Jnr School	2	702,940	701,385	691,965	1,556	10,975
Shinfield St. Mary's CE (VA) Junior School	52	1,223,046	1,223,046	1,040,270	0	182,776
Shinfield Infant & Nursery Sch	-3	1,102,709	1,102,709	1,097,732	0	4,977
Sonning Church of England Primary School	-3	787,019	784,478	784,874	2,541	2,145
South Lake Primary School	-1	1,475,311	1,470,426	1,439,004	4,885	36,307
ST CRISPIN'S SCHOOL	18	4,521,627	4,528,265	4,327,286	-6,638	194,341
St Dominic Savio Catholic Schl	20	1,450,554	1,452,383	1,352,137	-1,830	98,416
St Paul's C of E Junior School	0	1,356,141	1,356,141	1,320,528	0	35,613

ST PETER'S CE PRIMARY SCHOOL	6	1,680,282	1,673,335	1,625,489	6,947	54,793
St Sebastians CE Primary Sch	11	691,165	691,165	662,338	0	28,827
St Teresa's Catholic Primary School	-2	1,107,178	1,103,992	1,085,421	3,186	21,757
THE BULMERSHE SCHOOL	75	4,260,036	4,268,739	4,143,791	-8,704	116,245
The Colleton Primary School	19	1,357,635	1,357,635	1,273,388	0	84,247
The Holt School	11	4,706,522	4,698,931	4,520,816	7,591	185,705
The Piggott School	43	5,064,164	5,064,164	4,746,764	-1	317,400
Wescott Infant School	6	682,650	682,650	660,591	0	22,059
Westende Junior School	14	919,456	919,281	856,826	174	62,630
Wheatfield Primary School	26	599,075	598,942	510,079	133	88,996
Willow Bank Junior School	1	888,975	895,276	874,572	-6,301	14,402
Windmill Primary School	24	703,374	703,227	598,758	148	104,616
WINNERSH PRIMARY SCHOOL	11	1,597,146	1,597,146	1,518,919	0	78,227
Woodley CE Primary School	2	1,152,768	1,153,100	1,125,286	-333	27,481

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Bearwood Primary School	-5	1,055,383	1,055,383	1,069,611	0	-14,227
Crazies Hill C. E. Primary School	-5	457,988	457,988	473,859	0	-15,871
Finchampstead Primary School	-2	505,056	505,056	511,242	0	-6,185
Floreat Silver Meadow	0	208,832	209,109	230,878	-277	-22,046
Hatch Ride Primary School	-10	769,311	785,531	807,173	-16,220	-37,861
Hillside Primary School	-1	1,500,631	1,522,649	1,509,981	-22,018	-9,350
Keep Hatch Primary School	-14	1,431,215	1,429,462	1,477,019	1,753	-45,804
Nine Mile Ride Primary School	-13	1,205,491	1,208,791	1,211,577	-3,300	-6,086
Oaklands Infant	-6	674,950	682,563	706,604	-7,613	-31,654
Polehampton C of E Infant School	-2	723,802	723,802	723,957	0	-155
Rivermead Primary School	0	1,406,989	1,406,989	1,408,726	0	-1,737
St. Nicholas C.of E. Primary	-2	591,675	591,893	597,934	-219	-6,260
The Coombes C of E Primary	-75	1,400,318	1,379,772	1,649,306	20,545	-248,989
The Emmbrook School	-52	3,699,077	3,710,780	3,993,910	-11,702	-294,833
The Forest School	-117	3,753,783	3,753,868	4,169,077	-85	-415,295
The Hawthorns Primary School	-19	1,459,818	1,450,870	1,466,625	8,948	-6,807
Waingels College	-37	5,040,118	5,039,023	5,059,529	1,094	-19,411
Walter Infant School	-4	991,284	1,004,681	998,630	-13,397	-7,345
Whiteknights Primary School	-10	1,538,628	1,550,556	1,543,834	-11,928	-5,206
Willow Bank Infant School	-2	695,172	695,172	704,408	0	-9,236

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NOTE:

The majority of reduction from last year is as below:

1. Losing Pupil numbers.

Changes in Premises costs (not affected by pupil numbers)

2. Small or growing primary schools has lost £25k funding due to a reduction in the lump sum.

3. Reductions\changes in Business rates.

All a combination of all 3.

4. Adjustment in Prior attainment and deprivation factors from change in census from last year.
 5. New Academies from 1st January 2018 now factor into the formula - reduction in Bus. Rates.
- The draft budget assumes the same deprivation factors as last year.

Schools Forum Forward Plan 2018

21	February	Revenue Monitoring
		Contingencies breakdown
		High Needs Block Task and Finish Group
		Schools Forum Membership Review
		Any changes to the submitted version of the School Block 18-19 Budget.

28	March	Revenue Monitoring
		Contingencies breakdown

16	May	Revenue Monitoring
		Contingencies breakdown
		High Needs Block
		Carried forward deficit on centrally retained to be funding 18-19 from the school
		Update on scheme for financing schools
		Schools out-turn

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Agenda Item 41

TITLE	Education, Health and Care Plan Audit report summary
FOR CONSIDERATION BY	Schools Forum on 17 January 2018
WARD	Non Specific
DIRECTOR	Interim Director of People Services - Paul Senior

OUTCOME / BENEFITS TO THE COMMUNITY

The Local Authority has statutory duties as a result of the Children and Families Act and SEN Code of Practice 2014 to ensure that we assess and plan to meet the needs of pupils who are SEND. This change in legislation has led to changes in working practices along with a different skill set required of staff. This audit was undertaken to ensure that we are making best use of our resources and that we have responded to the challenges in an appropriate way, transferring statements to EHCPs appropriately with an accurate threshold for new EHCPs.

RECOMMENDATION

Schools' Forum are invited to note the key themes emerging from a qualitative study of Education, Health and Care Plans

SUMMARY OF REPORT

Wokingham Borough Council's SEN Team have made good progress in meeting the new demands of Education, Health and Care plans. The study finds that, on the whole, our thresholds are accurate and robust. There is a detailed action plan for the service to deliver as a result of the recommendations.

FINANCIAL IMPLICATIONS OF THE RECOMMENDATION

The Council faces severe financial challenges over the coming years as a result of the austerity measures implemented by the Government and subsequent reductions to public sector funding. It is estimated that Wokingham Borough Council will be required to make budget reductions in excess of £20m over the next three years and all Executive decisions should be made in this context.

	How much will it Cost/ (Save)	Is there sufficient funding – if not quantify the Shortfall	Revenue or Capital?
Current Financial Year (Year 1)	n/a		
Next Financial Year (Year 2)	n/a		
Following Financial Year (Year 3)	n/a		

Other financial information relevant to the Recommendation/Decision
n/a

Cross-Council Implications
n/a

Reasons for considering the report in Part 2
The likely disclosure of identifiable information.

List of Background Papers
Appendix A – Audit report

Contact Jane Winterbone	Service Education
Telephone No Tel: 07816493839	Email jane.winterbone@wokingham.gov.uk

By virtue of paragraph(s) 1, 2 of Part 1 of Schedule 12A
of the Local Government Act 1972.

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