



**WOKINGHAM
BOROUGH COUNCIL**

A Meeting of the **SCHOOLS FORUM** will be held in
**COUNCIL CHAMBER - CIVIC OFFICES ON WEDNESDAY
18 JULY 2018 AT 10.00 AM**

A handwritten signature in black ink, appearing to read 'Manjeet Gill'.

Manjeet Gill
Interim Chief Executive
Published on 10 July 2018



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

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
Amanda Woodfin	Secondary Head - Bulmershe
Paul Miller	Governor - St Crispins - Chairman
John Bayes	Governor - Foundry College - Vice-Chair
Ian Head	Governor - Aldryngton Primary

Non School Representatives

Marion Standing	Oxford Diocese
Vacancy	Roman Catholic Diocese
Shahid Younis	WBC Representative
Patricia Davies	Interim Assistant Director for Education
James Taylor	Wokingham and Bracknell College
Ian Morgan	Early Years Representative
Gail Prewett	Early Years Representative

Observers

Funding Reform Team Education Funding Agency, Maintained Schools Division

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.
----------	------	---------	----------

65	MINUTES OF PREVIOUS MEETING To confirm the Minutes of the Meeting held on 28 March 2018.	7 - 16
65.1	Matters Arising	
66	DECLARATION OF INTEREST To receive any declarations of interest.	
67	REVENUE MONITORING To consider a report containing the schools' current financial position.	17 - 24
68	OUTTURN REPORT 2017/18 To receive and consider a report giving details of the 2017/18 outturn.	25 - 30
69	DE-DELEGATED LICENCE CHARGES To receive and consider a report giving details of the de-delegated licence charges.	31 - 36
70	UPDATE ON FUNDING FORMULA CHANGES FOR 2019/20 To receive a verbal update on the Funding Formula changes for 2019/20.	Verbal Report
71	HIGH NEEDS BLOCK UPDATE To receive and consider the High Needs Block update report.	37 - 48
72	EARLY YEARS UPDATE To receive and consider a report containing an update on Early Years.	49 - 54
73	GROWTH FUND REPORT To consider the Growth Fund projection and outturn, including a request to carry forward a deficit from 2017/18.	55 - 60
74	SCHOOL ADMISSIONS DATA To consider a report giving details of School Admissions data.	61 - 90
75	FORWARD PROGRAMME To consider the Forums work programme.	91 - 92

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.

CONTACT OFFICER

Luciane Bowker,

Tel

Email

Postal Address

Democratic & Electoral Services Specialist

0118 974 6091

luciane.bowker@wokingham.gov.uk

Civic Offices, Shute End, Wokingham, RG40 1BN

This page is intentionally left blank

**MINUTES OF A MEETING OF THE
SCHOOLS FORUM
HELD ON 28 MARCH 2018 FROM 10.00 AM TO 11.47 AM**

Schools Representatives

Ali Brown	Primary Head - Nine Mile Ride Primary
Elaine Stewart	Primary Head - Aldryngton Primary
Sylvia Allen	School Business Manager - Hawkedon Primary
Carol Simpson	School Business Manager - Colleton Primary
Ginny Rhodes	Secondary Head - St Crispins
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
Keith McConaghy	School Business Manager - Oakbank
Paul Miller	Governor - St Crispins - Chairman
John Bayes	Governor - Foundry College - Vice-Chair

Non School Representatives

Anne Andrews	Oxford Diocese
UllaKarin Clark	Wokingham Borough Council
Patricia Davies	Interim Assistant Director for Education
Ian Morgan	Early Years Representative
Gail Prewett	Early Years Representative

Also Present

Luciane Bowker, Democratic & Electoral Services Specialist
Coral Miller, Interim Senior Finance Specialist, Schools
Lynne Samuel, Senior Finance Specialist, People Services
Paul Senior, Interim Director of People Services

56 APOLOGIES

Apologies for absence were submitted from Emma Clarke, Ben Godber, Derren Gray, Ian Head, Julia Mead, Jonathan Peck, Brian Prebble and James Taylor.

57 MINUTES OF PREVIOUS MEETING

The Minutes of the meeting of the Committee held on 21 February 2018 were confirmed as a correct record, subject to the changes below, and signed by the Chairman.

On page 11 where it says '*Ben Gobbler*' this be changed to Ben Godber.

On page 13 where it says '*Capital one*' this be changed to Capita One.

Matters arising

Service charges and academy charges

Janet Perry asked for clarification in relation to mid-year service charges and about the fact that academies were being charged more than maintained schools for psychological services.

Lynne Samuel, Senior Finance Specialist, People Services stated that these charges were levied for any schools that had not bought into the services but who required access to services. These charges had not been implemented in the past. However, due to reduced resources a decision had been made that this charge had to be applied to schools that had not bought into the service but still wanted to access services. She appreciated that the communication of this decision could have been better. Going forward it would be made clear to schools that had not bought into the service how much it would cost them to access services before they actually bought it.

Lynne Samuel announced that John Ogden, Finance Lead Specialist had now left the Local Authority and that his replacement, Bob Watson had been recruited on a permanent basis.

Farley Hill Governors' email

Councillor Clark was still awaiting to receive the email from Emma Clarke.

Data around the number of children currently attending primary schools who were likely to need special provision at secondary school

Patricia Davies stated that there were currently 118 children in Out of Borough provision. Corrina Gillard explained that the question was how many children that were currently in primary schools were likely to need specialist provision at secondary school. Patricia agreed to find out and report back.

58 DECLARATION OF INTEREST

There were no declarations of interest.

59 EARLY YEARS 2018-19 BUDGET

The Forum received the Early Years 2018/19 Budget report which was set out in agenda pages 15-22.

Coral Miller stated that the Early Years allocation had increased for two and three and four year olds by 24p per hour to £5.54 and £4.39 respectively.

Coral Miller explained that local authorities were required, from 2018/19 onwards, to pass 95% of their three and four year old funding from government onto Early Years' providers. This pass-through requirement ensured that the vast majority of government funding reached providers so that they could deliver free entitlements. Coral stated that Wokingham had decided to passport 96% to providers.

During the discussion of the item the following comments were made;

- Ian Morgan asked what was the recoupment charge in the previous year;
- Coral Miller explained that the numbers were calculated based on three in-year censuses, with adjustments being made after each census; any recoupment was based on these numbers;
- Ian Morgan believed that the two year old funding was outside the funding formula and therefore should not be top sliced and £5.74 should be paid to providers;
- Coral Miller explained that the two year old funding was outside of the 5% top slice rule, so it was possible to top slice it at a different rate, for example at 10%;
- Gail Prewett was surprised with this information and stated that it was difficult to breakdown the figures and to fully understand the Early Years funding;

- Coral Miller explained that Wokingham had decided not to exercise the right to top slice two year olds at a higher rate, 96% of funding for two year olds was still passported to providers;
- In response to a question Lynne Samuel, stated that the 4% was based on the January census;
- Ian Morgan pointed out that providers were receiving their 96% funding from a total of nearly £10 million, whereas the Local Authority was taking its 4% top slice from a calculated total of £11 million;
- Coral Miller explained that this calculation was based on a budget and not on an estimate, and that Section 251 had to be finalised by the end of April, any recoupment would take place in July;
- Ian Morgan noted that the item '*maximum amount to providers after providers reserves*' of £187K listed in Table B used to be referred as the contingencies fund in previous reports. He stated that the contingencies last year was £229K, and that he could not see the difference passed back to providers, he wished to see a breakdown of that item;
- Coral Miller confirmed that she had changed the name of the item to make it clearer;
- Coral Miller stated that the contingencies money/providers reserve was used to manage growth. If this reserve was not used within the year, this would be passed back to providers;
- Coral Miller expected that there would be growth as a result of the free 30 hours entitlement;
- In response to a question Lynne Samuel stated that the methodology to calculate the internal recharges for Early Years was standard and it was the same that was used across the Council;
- Schools Forum Members felt that it seemed a very high charge;
- Paul Miller stated that it should be 4% of the net amount of the worst case scenario and not £421K as listed in the report; rather than have to recoup the money, which incurred a cost/loss of income to the Early Years Team budget;
- Coral Miller agreed to look into this in more detail once the actual recoupment amount was received from the DfE in July;
- Members asked if there was a vacancy in the Early Years Team, Patricia Davies stated that Emma Slaughter was the Interim Manager;
- Patricia Davies stated that she had recently had a conversation with Ofsted in relation to Early Years and the feedback had been positive for Wokingham's provision;
- Members asked for clarification on the *Services – Specialist* listed in Table C and also on how many posts there were in the Early Years Team and whether there was a vacancy. Patricia Davies agreed to report back;
- Ian Morgan stated that Wokingham had recently been granted a £17K allocation fund, he would like to know where this was listed in the report. Lynne Samuel agreed to investigate and report back;
- Councillor Clark asked if providers were able to opt out of the services provided by the Council. Gail Prewett stated that the services provided by the Council were invaluable, however when funding was so limited providers wished to fully understand the breakdown of the funding allocations;
- Coral Miller explained that this was a statutory function;
- Ian Morgan believed that there was legislation in place preventing pre-schools from becoming academies;
- Paul Miller stated that there was concern that the overhead surcharge for services was a large amount; but there was recognition that the Local Authority was moving towards a centralised support system;

- Ian Morgan stated that providers were concerned that going forward only statutory duties were going to be provided; and that only settings that required improvement would receive extra help;
- Ian Morgan stated that the Early Years Team was as large as it had been for a number of years, however the services being provided were diminishing;
- Patricia Davies stated that support was going to be targeted to where this was needed, it was being prioritised;
- Elaine Stewart stated that her school had not received support from the Early Years Team, and she would be interested to know where the support was being delivered; and
- Patricia Davies stated that when the Schools Improvement Team visited schools they would speak about the Early Years offer and offered support if required.

After a robust discussion it was agreed that Schools Forum would like to receive a report containing information in relation to the support offered to Early Years, as there seemed to be a disparity in the perception of the extent of the provision between schools and the Local Authority. Patricia Davies stated that she would ask Emma Slaughter to prepare a report and attend the next meeting of Schools Forum to discuss this further. Paul Senior stated that that this report should include details of the system for the allocation of resources.

It was acknowledged that there was a lack of engagement between the Early Year's sector and the Local Authority. An Early Years Forum was being re-established in an effort to improve communication.

RESOLVED That:

- 1) The report be noted;
- 2) Emma Slaughter, Interim Early Years Manager would be invited to attend the next meeting and provide clarification to the various points raised during discussion.

60 SCHOOL ADMISSIONS BREAKDOWN

Coral Miller explained that Schools Forum had previously discussed the use of the £289,000 DSG contribution to the School Admissions Service planned for 2018/19 and asked for a breakdown of the budget costs.

Coral Miller drew attention to Appendix A of the report which contained the figures. She informed that the Senior School Admissions Officers were on a lower pay than stated in the report, she would update this with the minutes.

John Bayes pointed out that the percentage of internal recharge seemed very large.

Members noted that the report did not include benchmarking as requested by Schools Forum. Coral Miller agreed to chase the School Admissions service to provide information for the June Schools Forum.

Elaine Stewart was interested to know more about the refreshments costs. Luciane Bowker, Democratic and Electoral Services Specialist explained that this related to refreshments that were offered throughout the year to independent school appeals panel members. She stated that there were approximately 300 appeals during the year and that

the panel members were volunteers. She pointed out that it would cost more if they were to be paid to sit in appeal panels.

RESOLVED That the report be noted.

61 2018-19 SCHOOLS BUDGET

The Forum received the 2018/19 School Budget report which was set out in agenda pages 27-32.

Coral Miller stated that the report contained the Dedicated Schools Grant (DSG) for the financial year 2018/19, allocated in accordance with the Department of Education (DfE) Schools Guidance. This report presented a new format which included the four blocks of the Schools Budget, it was hoped this new format would make the report easier to understand and check against the DfE website.

Coral Miller went through the report and pointed out the deficit in the HNB, this was due to a predicted overspend and a carry forward deficit. Coral informed that it was therefore possible that the HNB deficit may turn out to be £2.4 million by 31 March 2019.

Coral explained that Grants were passed straight through to schools. She also pointed out that the sixth form funding had been reduced because there were less maintained secondary schools in the Borough.

Coral Miller stated that any adjustments for the HNB and Early Years Block figures would be known in July, a paper on the effect of that would be brought to Schools Forum in September.

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

- Members liked the new format and asked that the income against each Block showing the net position be included in future reports;
- Members expressed concern over the predicted deficit in the HNB;
- Coral Miller stated that Katherine Vernon, Schools Finance Specialist had attended a meeting in March with the DfE HNB Lead and that he had agreed to meet with the Local Authority to discuss the HNB deficit, the date had not yet been confirmed. Coral stated that all the Local Authorities that were present at the meeting reported difficulties with the HNB;
- Kerry Clifford stated that the main issue with the HNB deficit was the number of Out of Borough placements, she was interested to know if other Local Authorities had the same problem;
- Coral Miller stated that there were not enough specialist spaces within Local Authorities and that there was an increase in the demand for complex needs provision; and building provision would take time and investment;
- Paul Senior stated that Wokingham had a too high proportion of Out of Borough placements per capita compared to other Local Authorities he had worked at; and this needed to change;
- Janet Perry was concerned with the lack of increase in funding for schools in view of the increase in costs such as the increase in salaries and pensions; and
- Paul Miller asked that WLP is informed of the concerns raised in this meeting.

RESOLVED That the report be noted.

62 HIGH NEEDS BLOCK TASK AND FINISH GROUP UPDATE

Patricia Davies informed the Forum that the High Needs Block (HNB) Task and Finish Group had held its first meeting. This meeting had set out the objectives of the group. The group aimed to put together a recovery plan for the HNB.

Patricia Davies stated that the current system was not reflective of schools' needs, at the moment not all schools received the same amount of funding. The implementation of a revised banding system was being considered in order to address this issue. It was believed that this new system would be fairer and more transparent, enabling resource spaces and special schools to receive more equitable levels of funding.

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

- Members were surprised to find out that not all schools received the same amount of funding;
- In response to a question Patricia Davies explained that resource spaces received a similar amount of funding, but this was different from the amount received by special schools;
- Paul Miller stated that part of the work of the Task and Finish Group was to establish the current situation and to propose different, better ways of working;
- Paul Senior, Interim Director of People Services stated that the current model was not sustainable and not transparent, it needed reviewing and reforming;
- Paul Senior stated that there needed to be more discipline and an understanding that for every pound overspent, this had to be '*found*' somewhere else; there were implications on the overspend;
- Paul Miller stated that Schools Forum had challenged the finance team over this issue for a number of years and asked for a realistic recovery programme to tackle the HNB overspend;
- Steve Nyakatawa, SEND Consultant had been tasked to carry out a review of HNB and draw up a recovery plan;
- Councillor Clark stated that she had attended a meeting with the Equality Advisor for the National Education Union, he informed her that the government was going to be lobbied to release more money to cover the HNB overspend. She stated that out of the 45 Local Authorities that had applied to move money from the Schools Budget into the HNB, 27 were denied, 15 were allowed and some were partially allowed. It was recognised that the situation was unsustainable;
- Councillor Clark pointed out that Wokingham was the worse funded unitary authority in the country;
- Paul Senior stated that being the worse funded authority was not an excuse and it was necessary to ensure the best use of resources;
- Ginny Rhodes was interested to know more about the resource spaces consultation. Patricia Davies stated that this consultation had been set up by her predecessor and she recognised that there had been issues with the consultation. However, she assured the Forum that no decisions would be made until all the information had been gathered;
- In response to a question Paul Senior explained that the funding was not going to be reduced, it was going to be better allocated;
- Janet Perry believed that this review was long overdue and wondered if this had only happened as a result of the fact that Schools Forum had not agreed to top slice schools budget;

- Patricia Davies stated that it was hoped that a recovery plan would be in place for the winter;
- Paul Miller reminded Members that the New Funding Formula would not allow for money to be transferred from one Block Budget to another; and
- The next meeting of the HNB Task and Finish Group was due to take place after Easter.

RESOLVED That the verbal update report of the High Needs Block Task and Finish Group be noted.

63 WOKINGHAM LEARNING PARTNERSHIP UPDATE

Patricia Davies stated that a meeting with headteachers had taken place, however the communication had not fulfilled the expectations of the group, therefore she was reviewing the best way to move forward. Another meeting was being set up, it was important to understand what schools wanted to achieve and to work in partnership. She informed that an independent chair was in the process of being found.

Paul Senior stated that he had chaired the first meeting of the Wokingham Learning Partnership (WLP) and he agreed that the meeting had not been as positive as expected. He stated that it was now important to reflect and find a way to engage schools.

Patricia envisaged a small board with members of schools in partnership with the Local Authority.

Schools Forum asked how members of the WLP had been selected. Patricia Davies stated that volunteers had been sought by her predecessor.

RESOLVED That the Wokingham Learning Partnership verbal update be noted.

64 REVIEW OF SCHOOLS FORUM MEMBERSHIP

The Forum considered the membership report which was set out in agenda pages 33-38.

Paul Miller explained that the Schools Forum membership used to be reviewed yearly to ensure it was still appropriate and that it reflected the schools' structure in the Borough. However, in anticipation of the New Funding Formula and the potential changes to the format of Schools Forum, it had been decided in 2016 to keep the membership as it was and use the time at meetings to discuss more pressing issues.

Patricia Davies explained that the report contained an update on the previous membership report to reflect the number of pupils on roll. The report contained possible options for the Forum to consider.

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

- Paul Miller stated that alternatively the Forum may decide to continue with its current format or consider a transition period;
- Members pointed out that it was important to include representation from maintained secondary schools;
- Ginny Rhodes stated that she had spoken to maintained secondary heads and that they would be prepared to join Schools Forum. Patricia Davies agreed to contact maintained secondary headteachers about joining the Forum;

- Paul Miller read out an email from Derren Gray with his comments. Derren indicated that primary heads were unlikely to agree to reduce their representation at the Forum. He believed the Forum worked well in its current format and he would prefer it to remain with the same structure;
- Corrina Gillard stated that primary representation had historically been based on geographical areas;
- Paul Senior believed that Wokingham Borough was too small to consider geographical areas;
- Caroline Norries stated that it was important to ensure that there was good communication with the primary phase. She felt that with the current format primary heads were being kept informed satisfactorily, there were clear lines of communication;
- Members discussed the voting rights and concluded that it was very rare for Schools Forum to have to vote on decisions, therefore if and when it came to a vote, this was unlikely to become an issue;
- Jane Perry believed that the current membership provided a lot of expertise to the Forum, therefore she was in favour of keeping the membership as it was and if necessary reduce the number of votes;
- Paul Miller pointed out that having a large number of Members had enabled the creation of Task and Finish Groups, which had been very useful;
- Carol Simpson asked when the NFF was going to be fully implemented and who would be responsible for monitoring the HNB Budget. Paul Miller believed that a new structure would be put in place to replace Schools Forum, but this was not yet known;
- Paul Senior stated that a local decision may be taken in order to put in place a mechanism to monitor the HNB; and
- In response to a question Paul Miller stated that decisions in relation to the De-delegated Fund could only be taken by maintained school representatives.

Anne Andrews announced that this was her last attendance to Schools Forum meetings, Marion Standing would be taking her place representing the Oxford Diocese at future meetings. Paul Miller thanked Anne Andrews for her contribution to Schools Forum.

RESOLVED That:

- 1) Schools Forum membership would continue in its current format;
- 2) A maintained secondary head would be invited to join the Forum.

65 FOUNDRY COLLEGE UPDATE

Jay Blundell, Foundry College Headteacher presented the update report which was set out in Agenda pages 39-40.

Jay Bundell stated that Schools Forum had received a Foundry College report last May. One of the issues raised in that report had been in relation to the college's premises, she wished to thank colleagues in anticipation for embracing the issues and supporting the cause for Foundry College.

Jay Blundell stated that this update focused on the primary behaviour support provided by the college. Jay informed that she had presented this report to Wokingham primary heads, explaining in detail the support being delivered to primary schools over the last 12 months.

Jay Blundell stated that there was an ongoing issue in relation to the de-delegated funding to Foundry College. She explained that as a result of some primary schools becoming academies, there had been a reduction in the funding the college received from the de-delegated budget. Some primary academies had different agreements through the trust they joined and some primary academies bought the college's support on a case by case basis. Consequently, it had become very difficult to set a budget and plan staffing without having a known level of secure budget income.

Jay Blundell stated that the current situation was unsustainable, and that it was necessary to secure a centralised fund to ensure Foundry College's future.

Jay Blundell informed that the demand for primary school age behaviour support had been increasing, and she needed to secure a certain number of staff to be able to provide the service. Jay stated that providing behaviour support to primary school children enabled them to go back into mainstream secondary education, therefore saving future costs in secondary school specialist education.

Paul Senior stated that this was an important discussion, however he believed that the HNB Task and Finish Group was the best place to undertake this conversation.

In response to a question Jay Blundell confirmed that she was taking part in the HNB Task and Finish Group.

In response to a question Paul Senior stated that if the service provided by Foundry College was found to add value, a political decision would have to be made to ensure its sustainability.

Members were in agreement that the service provided by Foundry College was much valued and they wished it to continue. Members were asked to keep primary heads informed of the discussion that took place at the meeting.

RESOLVED That:

- 1) The discussions in relation to securing Foundry College's funding would take place at the High Needs Block Task and Finish Group;
- 2) Primary Heads would be informed of the update received at this meeting;
- 3) The report be noted.

66 GROWTH FUND UPDATE

The Growth Fund Update report had not been available for distribution to Schools Forum ahead of the meeting. The agenda item was therefore deferred to the next meeting.

67 SCHOOLS FORUM FORWARD PLAN

The Forum considered and noted the Forward Programme of work and dates of future meetings as set out on Agenda page 41.

The following items were added to the next meeting:

- Growth Fund Update and
- Early Years (update by Emma Slaughter)

Elaine Stewart stated that the date of the next meeting which was 16 May, was also the Year 6 SATs day. She pointed out that it may be difficult for some primary heads to attend.

Paul Miller asked Luciane Bowker to look into alternative dates and communicate with the Forum about possibly changing the date of the next meeting.

Agenda Item 67

TITLE	Revenue Monitoring Report
FOR CONSIDERATION BY	Schools Forum on 18 July 2018
WARD	None Specific
DIRECTOR	Interim Director of Children's Services - Lisa Humphries

OUTCOME / BENEFITS TO THE COMMUNITY

Not applicable

RECOMMENDATION

Schools Forum are asked to note the content of this report

SUMMARY OF REPORT

This report shows the 2018/19 forecast on the school budget as at the 31st May 2018, and reflects an anticipated overspend of £1.59m.

At this early stage of the financial year the forecast is largely informed by the 2017/18 outturn position, and will continue to be updated by changes brought about by the new academic year.

2018/19 Schools Revenue Monitoring Report July 2018

.01 Purpose of the Report

This report provides the Schools Forum with details of the revenue budget position as at 31st May 2018.

.02 Suggested Action

The Forum is asked to note the contents.

.03 Background

This report shows the expected outturn for the Dedicated Schools Grant (DSG) in financial year 2018/19. It makes the assumption that the centrally retained amount will be fully spent.

The de-delegated items funding within the main schools block comes from the contribution made by maintained schools and subsequently any underspend belongs to them, and will be held on their behalf.

.04 Forecast Movement

Given the pressures experienced on the High Needs Block during 2017/18, an early indication of the 2018/19 financial year was presented to Forum in February. At that time an overspend of £1.7m was anticipated for the year, with this now being revised to £1m.

Forecasts will continue to be reviewed over the summer, to reflect further changes associated with the new academic year.

.05 High Needs Block

Pressure on the High Needs Block continues to provide the most significant challenge to the schools budget. In year pressure, alongside the deficit brought forward from 2017/18, represents a £1.593m forecast overspend for 2018/19.

An SEN Strategy Group has been established, chaired by the Assistant Director for Education with input from Finance, Strategic Commissioning, and relevant schools. The group are considering service planning in light of pressure on resources and will identify all possible actions for delivering a balanced budget position and reduce the deficit.

Actions underway include:

- review of banding system for the funding of resource bases
- review and recommissioning of block contracts, and
- costed proposals for the expansion of suitable places within WBC.

Council Officers have invited the Department for Education (DfE) to visit WBC to discuss the pressures experienced and potential solutions, and this meeting is scheduled for the 16th July.

.06 Financial Summary

The forecast as at 31st May 2018 shows the following projected overspend, against budget of £136.9m (1.2%):

Description	£000
Brought forward from 2017/2018	£527
Estimated overspend in 2018/2019	£1,066
TOTAL	£1,593

This position is largely informed by the 2017/18 outturn position, and represents a reduced estimated overspend for the year against the early indication figures reported to Forum in February. As anticipated, the budget pressure relates to the High Needs Block.

Please refer to:

Appendix A - Summary of 18/19 School Revenue Monitoring Report.

Appendix B - Detailed breakdown of 18/19 revenue monitoring.

Coral Miller
Interim School Finance Manager
July 2018

Bob Watson
Lead Specialist - Finance (deputy s.151 officer)
July 2018

Appendix A						
Summary of 1819 school revenue budget monitoring						
INCOME						
Ref	Description	A	B	C	D	E
		Budget	Forecast	Forecast	Last Mth	
		2018-19	February	May	Variance	Variance
			2018-19	2018-19	(C - B)	(C - A)
		£	£	£	£	£
	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.	(99,543)	(99,543)	(99,543)	-	-
	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.	(18,083)	(18,083)	(18,083)	-	-
	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.	(11,063)	(11,063)	(11,063)	-	-
	Centrally Retained Block - Contribution to pay for the council's statutory duties.	(944)	(944)	(944)	-	-
	Sub Total	(129,633)	(129,633)	(129,633)	-	-
	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)	(2,193)	(2,193)	(2,193)	-	-
	UFSM Revenue / Start Up	(2,227)	(2,227)	(2,227)	-	-
	Pupil Premium excl Academies	(2,209)	(2,209)	(2,209)	-	-
	6th form funding from EFA for Secondary school with a 6th form.	(664)	(664)	(664)	-	-
	Sub Total	(7,293)	(7,293)	(7,293)	-	-
	TOTAL INCOME	(136,925)	(136,925)	(136,925)	-	-
	check	-				
	EXPENDITURE					
	Description	£	£	£	£	£
A	Academy Allocated budget	46,318	46,318	46,318	-	-
A	School allocated budget excluding 6th form funding	51,031	51,031	51,031	-	-
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.	1,393	1,393	1,393	-	-
G	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	1,744	1,744	1,737	(7)	(7)
E	Early year including EYPP grant	10,641	10,641	10,641	-	-
H	Centrally retained activities for Early years statutory duties.	421	421	421	-	-
B	Grant allocation to schools	7,293	7,293	7,293	-	-
D	High need grant allocated budget	18,083	19,793	19,156	(637)	1,073
	Miscellaneous	-	-	-	-	-
	TOTAL EXPENDITURE FORECAST	136,925	138,635	137,991	(644)	1,066
	Brought Forward Deficit/Surplus		717	527	(190)	527
	Surplus () Deficit +	0	2,427	1,593	(644)	1,593

APPENDIX B - Schools Budget 2018/2019					
	A	B	C	D	E
S251 title	2018/19 Budget	February Forecast 2018-19	May Forecast 2018-19	Variance against C-B changes from last month	Variance against C-A change against the forecasted budget
TOTAL EXPENDITURE					
SCHOOL BLOCK					
Schools Block Allocation excl Academies net of de-delegated funds including HNB allocations	51,031	51,031	51,031	-	-
Academy Recoupment from Schools Block	46,318	46,318	46,318	-	-
Total allocated to schools	97,349	97,349	97,349	-	-
De-delegated					
School-specific contingencies	107	107	107	-	-
insurance	453	453	453	-	-
Licenses and subscriptions	147	147	147	-	-
Staff Costs - supply cover	299	299	299	-	-
Support to under-performing ethnic minority groups and	118	118	118	-	-
Behaviour Support Services	269	269	269	-	-
Sub total of De-delegated	1,393	1,393	1,393	-	-
Pupil growth/ Infant class sizes	800	800	793	-	(7)
Total School Block Budget	99,543	99,543	99,536	-	(7)
CENTRALLY RETAINED BLOCK					
Strategic and Regulation function	350	350	350	-	-
SACRE	7	7	7	-	-
School Asset Management	81	81	81	-	-
1.6.2 Education welfare service	141	141	141	-	-
Statutory I.T. , census and information.	72	72	72	-	-
School admissions	289	289	289	-	-
Servicing of schools forums	4	4	4	-	-
Total of Centrally Retained Block	944	944	944	-	
EARLY YEAR'S BLOCK					
Early Years Block Allocation including Providers reserve fund inc exp for Education of Children under 5s in Private/voluntary/independent settings	10,641	10,641	10,641	-	-
Early years Centrally Retained for statutory LA duties	421	421	421	-	-
Total Early Year's block	11,063	11,063	11,063	-	-
HIGH NEEDS BLOCK					
High needs academy recoupment	1,386	1,386	1,386	-	-
High Needs Block allocations	7,427	7,444	7,478	34	51
Provision for pupils with SEN (including assigned resources)	1,819	2,212	2,070	(142)	251
Fees for pupils at independent special schools & abroad	5,542	6,686	6,449	(237)	907
Pupil Referral Units	470	470	470	-	-

Education out of school	638	638	638	-	-
SUB TOTAL	17,282	18,836	18,491	(345)	1,208
Centrally retained high needs block					
Moderating Panels	150	200	185	(15)	35
Provision for pupils with SEN, provision not included in line 1.2.1	20	20	20	-	-
Support for inclusion - HNB	401	507	231	(276)	(170)
SEN transport	230	230	230	-	-
SUB TOTAL	801	957	665	(292)	(135)
					-
TOTAL HNB	18,083	19,793	19,156	(637)	1,073
GRANTS					
UIFSM Revenue / Start Up	2,227	2,227	2,227	-	-
6th form funding from EFA	664	664	664	-	-
PE Grant - Additional school grants	2,193	2,193	2,193	-	-
Pupil Premium allocated to schools - mainstream	2,167	2,167	2,167	-	-
Pupil Premium 3-4 years	42	42	42	-	-
GRANTS TOTAL	7,293	7,293	7,293	-	-
					-
TOTAL SCHOOLS BUDGET	136,925	138,635	137,991	(637)	1,066
					-
S251 title	2018/19 Forecast - Budget	February Forecast 2018-19	May Forecast 2018-19	Variance against C-B changes from last month	Variance against C-A change against the forecasted budget
FUNDED BY:					
Schools Block Allocation includes Academies	99,543	99,543	99,543	-	-
High Needs Block includes Academies	18,083	18,083	18,083	-	-
Early Years Block 3-4 year olds	11,063	11,063	11,063	-	-
Centrally retained block	944	944	944	-	-
Dedicated schools Grant total	129,633	129,633	129,633	-	-
PE Grant	2,193	2,193	2,193	-	-
UIFSM Revenue	2,227	2,227	2,227	-	-
Education Funding Agency 6th Form Funding	664	664	664	-	-
Pupil Premium 5-16 years	2,167	2,167	2,167	-	-
Pupil Premium 3-4 years	42	42	42	-	-
TOTAL FUNDING	136,925	136,925	136,925	-	-
					-
Variance between the Expenditure and Income (I & E) (surplus)/deficit	0	1,710	1,066	(644)	1,066
Brought Forward High Needs block (surplus) /Deficit balance	-	717	527	(190)	527
Total Year-end (surplus)/Deficit	0	2,427	1,593	(834)	1,593

This page is intentionally left blank

Agenda Item 68

TITLE	Schools Outturn Report 2017/18
FOR CONSIDERATION BY	Schools Forum on 18 July 2018
WARD	None Specific
DIRECTOR	Interim Director of Children's Services - Lisa Humphries

OUTCOME / BENEFITS TO THE COMMUNITY

Not applicable

RECOMMENDATION

Schools Forum are asked to note the content.

SUMMARY OF REPORT

The report provides information on the final 2017/18 outturn on the schools budget, reporting an overspend of £762k.

This reflects an improved position on the projected overspend previously reported to Forum of £1.078m, and reflects a reduction on expenditure within the High Needs Block against the forecast.

2017/18 Schools Block Outturn
July 2018

.01 Purpose of the Report

This report provides the Schools Forum with the final 2017/18 Schools Block outturn.

.02 Suggested Action

The Forum is asked to note the contents.

.03 Background

This report shows the actual outturn for the Dedicated Schools Grant (DSG) and any additional schools funding provided by the Council for the financial year 2017/18.

.04 Financial Summary

The final outturn for the year shows an overspend of £762k, which is an improved position on the projected overspend previously reported to Forum of £1.078m.

While this still represents a significant pressure on schools budgets, a reduction in expenditure of £316k was delivered against the forecast, largely in relation to the High Needs Block with a reduction experienced against the Independent Special Schools budget.

Please refer to:

Appendix A - Summary of 2017/18 school outturn monitoring report.

Appendix B – Breakdown of the overspend.

Coral Miller
Interim School Finance Manager
July 2018

Bob Watson
Lead Specialist - Finance (deputy s.151 officer)
July 2018

APPENDIX A - Schools Out-turn report 2017/2018						
Schools Budget 2017/18 - Revised						
		B	C	D	E	F
S251 line no.	S251 title	2017/18 Forecast - Budget	January Forecast 2017-18	Out-turn 2017-18	Variance against D-C changes from January forecast and Out-turn	Variance against D-B change against the forecasted budget
	TOTAL EXPENDITURE					
1.0.1	Schools Block Allocation excl Academies net of de-delegated funds including HNB allocations	62,053	60,267	57,693	(2,574)	(4,360)
1.7.4	6th form funding from EFA	3,258	3,258	3,258	-	-
1.8.1	Academy Recoupment from Schools Block	30,675	32,461	35,035	2,574	4,360
1.0.1	High needs academy recoupment	1,386	1,386	1,386	-	-
UIFSM	UIFSM Revenue / Start Up	2,227	2,227	2,227	-	-
1.0.1.	High Needs Block allocations	6,143	6,896	7,147	251	1,004
PPG	Pupil Premium excl Academies	2,420	2,420	2,420	-	-
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	0	(260)
	Sub Total of ISB and PVI allocations	117,109	117,602	117,853	251	743
	PE Grant - Additional school grants	250	250	250	-	-
1.0.2	Pupil Premium allocated to schools - mainstream	129	129	129	-	-
1.0.3	Pupil Premium in non-mainstream settings	37	37	37	-	-
	Pupil Premium 3-4 years	42	42	42	-	-
1.1.2	School-specific contingencies	129	129	60	(69)	(69)
1.3.1	Early Years Contingency - Providers only	229	229	229	-	-
1.3.1	Early years Centrally Retained for statutory LA duties	370	370	370	-	-
1.2.1	Provision for pupils with SEN (including assigned resources)	2,517	2,661	2,720	59	203
1.2.1	Moderating Panels	150	200	185	(15)	35
1.2.2	Provision for pupils with SEN, provision not included in line 1.2.1	20	20	20	-	-
1.2.3	Support for inclusion - HNB	507	507	196	(311)	(311)
	Unallocated increase in the HNB special school budget	692	-	-	-	(692)
1.2.4	Fees for pupils at independent special schools & abroad	6,119	6,686	6,449	(237)	329
1.2.5	SEN transport	230	230	230	-	-
1.2.7	Inter-authority recoupment	-	-	-	-	-
1.2.1	Pupil Referral Units	470	470	470	-	-
	Behaviour Support Services	321	321	321	0	-
1.2.6 and 1.2.7	Education out of school	710	658	669	11	(41)
1.4.1	Support to under-performing ethnic minority groups and bilingual	143	143	143	(0)	-
1.4.10	Pupil growth/ Infant class sizes	1,300	1,300	1,381	81	81

1.6.1	insurance	547	547	547	(0)	(0)
1.4.2	School admissions	304	304	239	(65)	(65)
1.6.4	Licenses and subscriptions	220	220	220	0	0
1.4.13	Miscellaneous (not more than 0.1% total of net SB)	97	97	-	(97)	(97)
1.4.3	Servicing of schools forums	4	4	4	-	-
1.6.7	Staff Costs - supply cover	362	362	424	62	62
	ESG Services	373	373	387	14	14
	Total Central Expenditure	16,273	16,289	15,723	(566)	(550)
	TOTAL SCHOOLS BUDGET	133,382	133,891	133,575	(316)	193
						-
S251 line no.	S251 title	2017/18 Forecast - Budget	January Forecast 2017-18	Out-turn 2017-18	Variance against B-A	Variance against C-A
	TOTAL INCOME					-
DSG	Schools Block Allocation includes Academies	(94,864)	(94,864)	(94,864)	-	-
	NQT		-		-	-
DSG	High Needs Block includes Academies	(18,944)	(18,944)	(18,944)	-	-
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
DFE	Additional School Grants	(250)	(250)	(250)	-	-
DFE	UIFSM Revenue	(2,227)	(2,227)	(2,227)	-	-
EFA	Education Funding Agency 6th Form Funding	(3,258)	(3,258)	(3,258)	-	-
EFA	Pupil Premium 5-16 years	(2,586)	(2,586)	(2,586)	-	-
DFE	Pupil Premium 3-4 years	(42)	(42)	(42)	-	-
	TOTAL FUNDING	(131,718)	(131,457)	(131,457)	-	260
						-
Funding	Variance between the Expenditure and Income (I & E) (surplus)/deficit	1,665	2,434	2,118	(316)	453
	Brought Forward (surplus) /Deficit balance	(1,356)	(1,356)	(1,356)	0	0
	ESG services					
	Total Year-end (surplus)/Deficit	309	1,078	762	(316)	453

Appendix B

Breakdown on the overspend	
Balance sheet allocation of DSG reserves	£000
High Needs Block deficit carry forward to 2018-19	£527
Growth fund SF request re deficit carry forward to 2018-19	£81
De-delegated	
Contingency	-£69
Maternity	£62
Variance	-£7
Centrally retained	£160
TOTAL	762

Note:

The Early Years Budget is fully spent as any underspend is earmarked for Early Years Providers.

Details will be brought to Schools Forum once the "clawback" for 2018/19 is confirmed by the DfE

This page is intentionally left blank

Agenda Item 69

TITLE De-delegated Outturn 2017/18

FOR CONSIDERATION BY Schools Forum on 18 July 2018

WARD None Specific

DIRECTOR Interim Director of Children's Services - Lisa Humphries

OUTCOME / BENEFITS TO THE COMMUNITY

Not applicable.

RECOMMENDATION

For maintained schools to comment and make a decision on the options proposed for the spend of the licences budget underspend re de-delegated funds.

SUMMARY OF REPORT

The report shows the correct treatment of licences that are being funded by the Department for Education (DfE) which may have a positive financial impact on maintained schools' balances.

2017/18 Outturn on Schools De-delegated Budget July 2018

.01 Purpose of the Report

This report is to ask the maintained schools members of the Schools Forum to approve one of the suggested proposals listed below for the underspend in licences for 2017/18 and the budget for 2018/19.

.02 Background

The Council, through the de-delegation process, charged maintained schools for the following licences in 2017/18 and 2018/19:

1. Christian Copyright Licensing International
2. Copyright Licensing Agency
3. Education Recording Agency
4. Filmbank Distributors Ltd. (for the public video screening licence)
5. Mechanical Copyright Protection Society
6. Motion Picture Licensing Company
7. Newspaper Licensing Authority
8. Performing Rights Society
9. Phonographic Performance Limited
10. Schools Printed Music Licence

It has been clarified that these licences are now being paid for by the Department of Education (DfE) and has already been “topliced” from the Dedicated Schools Grant before it is allocated out to Local Authorities.

.03 Financial Summary

The licence amount charged to the maintained schools for 2017/18 was £73,722 and in 2018/19 was £82,182. Total amount therefore available for consideration by the maintained schools is £155,904.

.04 Proposals for use of funding

The Council has identified 2 proposals for consideration by maintained schools.

Proposal 1 reflects the opportunity to redirect the funding to bolster other service areas utilised by maintained schools where budget pressures are evident.

Proposal 2 reflects a direct return of funds to those schools that contributed.

Details of each proposal are given below.

Proposal ONE

Three areas have been identified where support to maintained schools is limited by existing budget restrictions. Proposal 1 is therefore to redirect the funds available to those areas to bolster support to schools where appropriate.

A. Support the underperforming EMG & Bilingual Learners

The pupil achievement budget has considerably reduced funds this year (£27,500) due to the impact of academisation. As things stand, the decision has had to be taken that, from September, it will not be possible to provide schools with funding when they admit a newly arrived pupil from abroad with English as an additional language – a service that has been offered for many years and which is much valued by schools. This funding enables schools to pay a teaching assistant to provide 20 hours support for the newly arrived child, and to buy dual language stories and dictionaries. Because admission of new arrivals is unpredictable, it is difficult for schools to budget from their own funds to support such pupils. During the academic year 2016/17, funding was provided to 31 maintained schools for 167 newly arrived children.

£21,700 was provided to schools in this way during the last financial year. A similar level of additional funding for this cost centre this year would enable the new arrivals funding to continue to be available for schools during the coming academic year.

Therefore the request is to provide the shortfall in budget of £27,500 from the amount available.

B. Increase the staff cover budget

This budget provides funding for schools to ensure cover for circumstances such as maternity leave, and during 2017/18 experienced an overspend of £62,000. Providing this level of funding to the budget for 2018/19 would ensure that provision is available to schools when required.

i. Maternity Leave

Staff Group	Description	Funding
Teaching Staff	6 weeks pay	Full pay
	33 weeks maternity pay	Approx. £140 per week
	12 weeks occupational pay	Half pay
Support staff	6 weeks pay	90% Full pay

	13 weeks maternity pay	Approx. £140 per week
	12 weeks occupational pay	Half pay

- ii. Paternity Leave – 2 weeks full pay.
- iii. Trade union cover – One full time post funding to support schools that need to cover trade union duties.
- iv. Public duties – Jury service.

These costs for maintained schools are charged directly to the Council rather than the school and then reimbursed to the school.

C. Support small maintained schools re lump sum adjustment

When setting the 2018/19 budget, Forum agreed a reduction to the lump sum funding as a stepped move towards the National Funding Formula. This represents a bigger impact on smaller schools than those with larger pupil numbers.

It is therefore proposed to support small maintained schools (those with under 200 on their roll) who have been adversely affected by the adjustment to the lump sum in the 2018/19 schools budget. Assuming 11 schools, this represents a cost of £66,400.

Proposal ONE Summary

Ref	Description	Total
A	Support for underachieving EMG & Bilingual Learners	£27,500
B	Staff Cover	£62,000
C	Lump sum support for schools under 200 children on roll	£66,400
	TOTAL	£155,900

Proposal TWO

Return the funding to all maintained schools and academies that have paid into the licences pot. Amount per school would be £1,638.27 (2017/18) and £1,911.22 (2018/19) with a maximum payment to each school of £3,549.49.

Schools that have converted into Academies during the financial year 2017/18 will receive a pro-rata or full refund of the £1,638.27 depending on the date of conversion.

Please see Appendix A for more details.

.05 Recommendation

The maintained schools are asked to vote on which option they would prefer from the 2 options presented, and approve the Council to action Proposal 1 or Proposal 2.

Coral Miller
Interim School Finance Manager
July 2018

Bob Watson
Lead Specialist - Finance (deputy s.151 officer)
July 2018

APPENDIX A										
DE-DELEGATED 2018-19 BUDGET										
De-delegated services to maintained schools 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	Refund of Licences for 2018/19	Revised De-delegation amount in 2018-19	Refund of Licences for 2017/18
Cost per school										
Aldryngton Primary School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
All Saints C.E. (Aided) Primary School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Bearwood Primary School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Beechwood Primary School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Crazies Hill C. E. Primary School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Emmbrook Infant School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Emmbrook Junior School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Farley Hill Primary School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Finchampstead Primary School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Gorse Ride Infant School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Gorse Ride Junior School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Grazeley Parochial Primary School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
HAWKEDON PRIMARY SCHOOL	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Highwood Primary School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Hillside Primary School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Keep Hatch Primary School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Lambs Lane Primary School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Loddon Primary School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Nine Mile Ride Primary School	0	0	0	0	0	0	0	0.00		-1,638.27
Polehampton C E Junior School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Polehampton C of E Infant School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Radstock Primary School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Rivermead Primary School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Robert Piggott CE Infant School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Robert Piggott CE Jnr School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Shinfield Infant & Nursery Sch	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Shinfield St. Mary's CE (VA) Junior School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Sonning Church of England Primary School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
South Lake Primary School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
St Dominic Savio Catholic Schl	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
St Paul's C of E Junior School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
St. Nicholas C.of E. Primary	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
The Colleton Primary School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
The Hawthorns Primary School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Walter Infant School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Wescott Infant School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Westende Junior School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Whiteknights Primary School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Willow Bank Infant School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Willow Bank Junior School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
WINNERSH PRIMARY SCHOOL	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
Woodley CE Primary School	2,491	10,528	3,422	6,962	2,755	6,551	32,709	-1,911.22	30,798	-1,638.27
ST CRISPIN'S SCHOOL							0	0.00		-1,638.27
The Emmbrook School	2,491	10,528	3,422	6,962	2,755		26,158	-1,911.22	24,247	-1,638.27
THE BULMERSHE SCHOOL	2,491	10,528	3,422	6,962	2,755		26,158	-1,911.22	24,247	-1,638.27
Total Allocation	107,095	452,717	147,160	299,377	118,453	268,592	1,393,393	-82,182	1,311,211	-73,722

Dedicated Schools Grant High Needs Block

Exec Briefing
2nd July

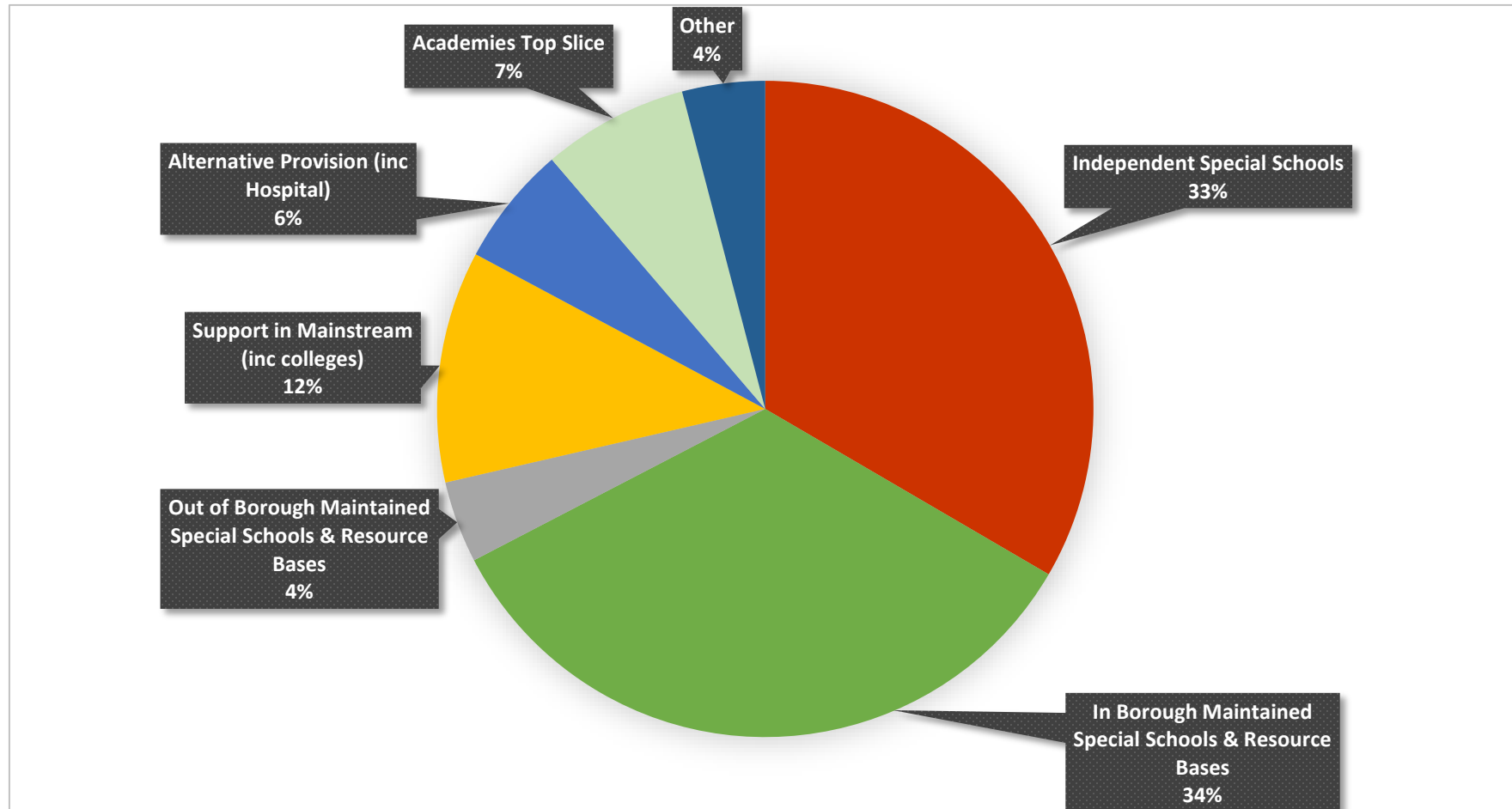


WOKINGHAM
BOROUGH COUNCIL

High Needs Block - Financial Summary

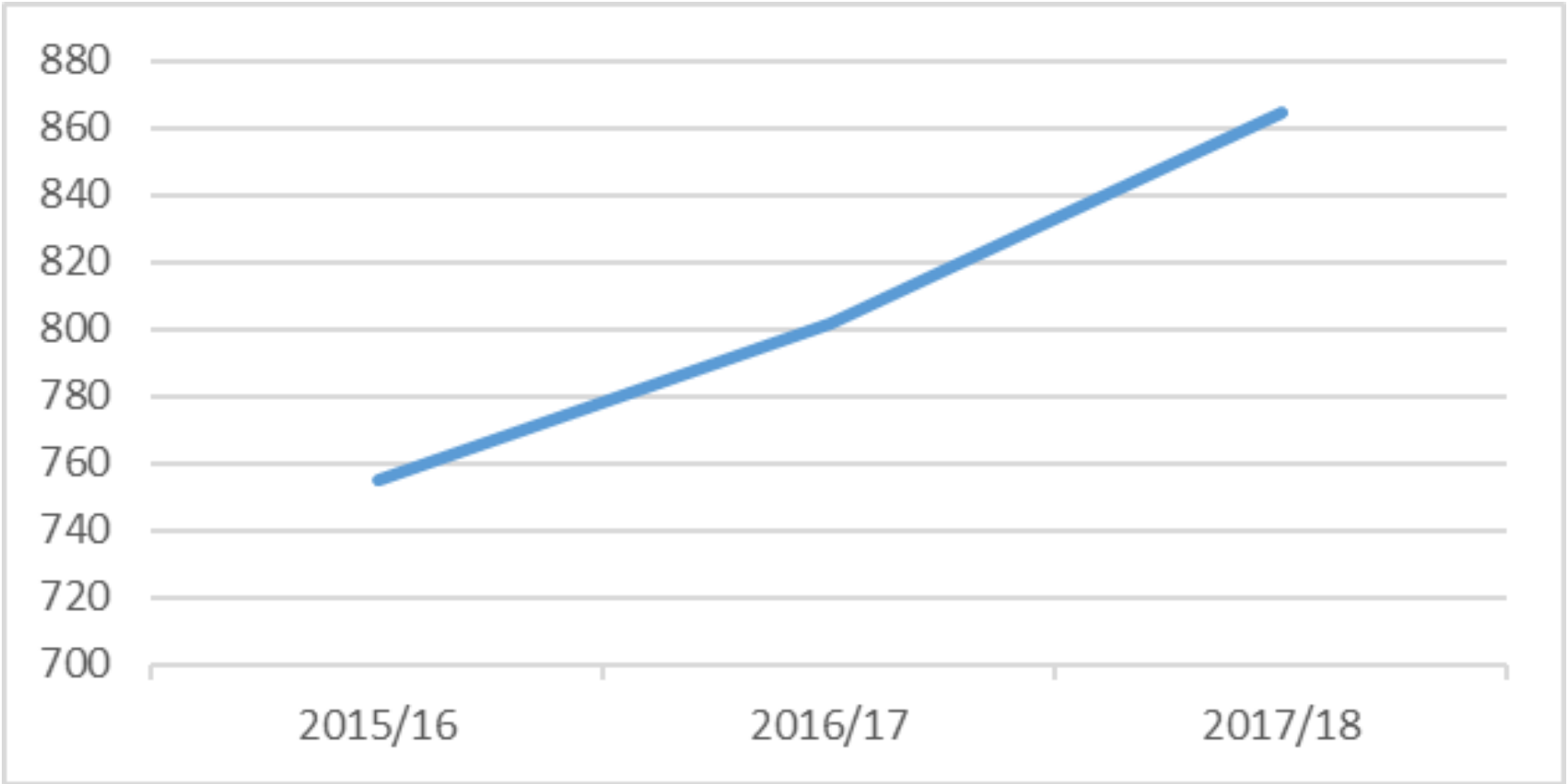
- 2017/18 deficit of £527k rolled forward
- Budget for 2018/19 of £18m
 - £1.4m top sliced for Academies by DfE
 - £16.6m funds full range of SEN settings and support
- Request for 0.5% (£500k) transfer from Schools Block not supported by Schools Forum and subsequently rejected by Secretary of State
- 2018/19 deficit of £1.6m forecast (including 2017/18 b/f)

High Needs Block 2018/19



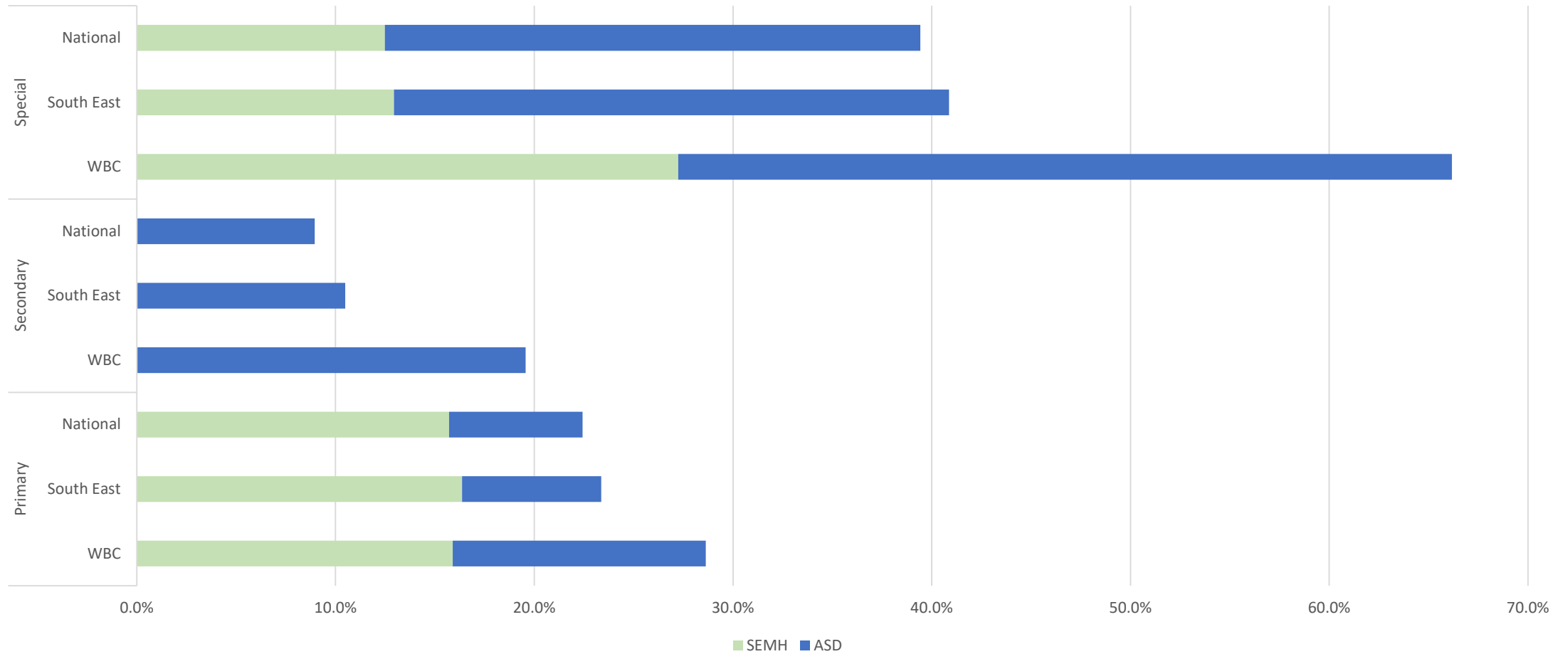
Individuals with SEN supported by HNB

40



% of SEN pupils with SEMH & ASD

41



Current Issues in High Needs Block

- Banding system is not fair or equitable.
- 119 pupils educated out of borough at a cost of £6.4 million.
- Lack of sufficient places in borough particularly for Autistic Spectrum Disorder (ASD) and Social, Emotional and Mental Health (SEMH) pupils.
- Impact on home to school transport of pupils educated out of borough.
- Funding for pupils with EHCP and educated in mainstream schools or resource bases within the borough have stagnated over the last few years.
- Unable to claw back £700,00 which was diverted to schools block in 2016-2017.
- Government underfunding, which is a national issue
- It will take more than two years to bring High Needs Funding back in to budget

Banding System is not fair or equitable

The situation now:

- Funding of EHCPs is currently based on primary need and recommended therapies. These are written into EHCPS based on reports from a variety of involved professionals including Educational Psychologists, paediatrician, CAMHS, Occupational health etc
- The cost of additional therapies varies according to where the child is placed and tends to increase substantially if independent providers are used
- There is no equitable system for funding eg Northern House is paid one amount of £22,000 per pupil no matter what their need, Addington has a banding system but there is a difference of over £10,000 with the two top tiers

What are we doing to improve this?

- In collaboration with schools we are introducing a banding matrix that will ensure all pupils with EHCPs are allocated funding based on set criteria. Each aspect of support will be costed and applied equally to all pupils.
- The SEN team will look at each case over the summer, apply the funding according to strict criteria, consult with schools, Schools Forum and introduce the final system to all schools by March 2019.

119 pupils currently educated outside the Borough at a cost of £6.4 million.

What is the situation now:

- Lack of places within Wokingham, particularly for pupils with Autistic Spectrum Disorder (ASD) and Social and Emotional and Mental Health (SEMH)
- Increase in diagnoses of these conditions reflected nationally
- New housing estates being built but with no additional special schools or places, this was not taken into the equation with the Primary or Secondary Places Strategies
- Out of borough provision with additional transport is a costly but necessary, if we cannot meet need in our own schools. (Code of practice 2014)

What are we doing about it?

- Proposal to expand Addington School business case is being finalised
- Proposal to expand The Foundry (SEMH) to follow
- Proposal to invest in outreach support from The Foundry to support the management of behaviours in mainstream schools, thus reducing the need for EHCP and/or special schools places in some cases
- L.A. proposal to apply for a Free school in partnership with Addington and The Foundry– when DFE window opens
- L.A. investigating and commissioning more cost effective provisions

Resource bases in Wokingham Schools supporting SEN pupils to access mainstream education

The situation now:

- £700k diverted to schools block in 2017 cannot be clawed back due to new government regulations
- Resource bases have seen increase in complex need identified in EHCPs and cannot meet this need in line with their original terms of reference and the additional staffing cost
- Most schools with resource bases are seeing an impact on their school budget as they subsidise the resource base
- Government underfunding nationally

45

What are we doing about it?

- Review of all resource base SLAs and contracts with independent providers
- Introduction of fair and equitable banding matrix, although this at best will be cost neutral
- CFLT Meeting with DFE to discuss funding and changing SEND needs in Wokingham

Home to School Transport

The situation now:

- £2.2m general fund budget forecast to be £200k overspent in 2018/19
- Includes contribution from High Needs Block of £230k
- Overspend driven by increasing SEN placements out of borough

46

What are we doing to improve this?

- School Admissions and Transport teams aligned under one Service Manager to improve joint planning and drive out efficiencies
- Review of approach to single pupil taxi journeys where appropriate
- Exploration of an independent travel training programme
- Actions to build capacity within Wokingham will have direct benefit on transport costs

Summary Action Points

- Co-production group with head teachers, LA officers including SEN, commissioning and school improvement to produce long term 0-25 SEND strategy (June /July 2018)
- Banding review to come in to effect in (March 2019)
- Meeting with DfE to discuss issues (July 2018)
- Review of home to school transport (September 2018)
- Extending Addington Special School, which is outstanding, to take 50 more ASD pupils (2019/2020)
- Extending Foundry College (2019/2020) which is good with outstanding features, to provide funded support for all primary schools and to consider specialist SEMH provision (April 2019)
- Joint application from Addington, Foundry and LA to open a free special school (when DfE application window opens 2018)
- Not renewing contract with Northern House and paying for pupils on case by case. (December 2018)
- Investigating SLA with a potential new primary resource base for ASD (June/July 2018)
- Investigating other schools outside of the borough which would provide more cost effective provision (June/July 2018)

Next Steps

- Governance structure to support process to include commissioning, education, finance – August 2018
- Report on out of borough cost effective provision – August 2018
- Create a detailed, costed action plan – September 2018
- Prepare fully costed business plan on capital spend for Addington expansion – September 2018
- Implement SLAs with all resource bases, special school and PRU – September 2018
- Prepare fully costed business plan on capital spend for expansion of Foundry to provide SEMH base – October 2018
- Prepare fully costed and long term saving on LA fully funding outreach provision for behaviour support from Foundry for all primary provision – October 2018
- Present to Schools' Forum – November 2018
- Present to CLT – November 2018
- Present to Executive – December 2018

Wokingham Borough Council

Schools Forum: July 2018

Overview of the Early Years and Childcare Service: role and responsibilities

Dr. Emma Slaughter

3 July 2018

Background

September 2014 saw a revision to the Statutory Guidance for Local Authorities in England, in respect of how they engage with and support, Early Years provision. Signalling a move away from the 'universal' approach taken in recent years, a more targeted way of working was required – one that, in essence, removed the expectation of support for settings which were deemed to be 'Good' or 'Outstanding'¹. Instead, an explicit expectation that resources would be focussed only on those who were not yet 'Good' was stipulated². The requirement to ensure sufficiency of childcare for working parents was reinforced, as too was the requirement to provide information, advice and training to providers – albeit, again, with a focus on this being targeted to statutory need and/or at those providers that are not yet 'Good'.

The above changes were strengthened in the March 2017 iteration of the Statutory Guidance³, and included references to the need to provide sufficient and appropriate funded places for parents of eligible 2, 3 and 4 year olds, including funded 30hour places for eligible parents. Thus, the landscape of early years is markedly different now compared to pre-2014, resulting in an imperative to adjust and modify working practices that enable Wokingham Borough Council to meet its statutory obligations and expectations - within the budget afforded - whilst remaining an efficient support mechanism for setting and parents alike.

Evidently therefore, there has been a distinct shift away from LA Early Years services providing a universal, open-access support, to all settings. Instead, it is now required to focus its attention on those settings in greatest need and to be much more of an '**enabler**' to settings; creating an ethos that settings must be more self-sufficient and self-supporting, rather than fuelling a culture of dependency upon the Local Authority for all training, support and/or advice.

Staffing and Funding

The current Early Years team consists of four full-time Advisor posts, led by a full time Team Leader. The team's Leader post is currently vacant, with interim management cover in place. All posts within the team are funded by the central Early Years aspect of the DSG monies allocated to Wokingham Borough Council from central Government. Under the Early Years National Funding Formula, introduced in 2017, Wokingham Borough Council is permitted to retain up to 5% of the total early years amount allocated, to be used for centrally retained provision. Currently WBC retains 4%, in order to pay for the central Early Years & Childcare service and the support services within the Council in connection with meeting its statutory obligations e.g. services from Data & Performance, SEND, Admin, Finance, HR, Legal, etc.

Current context

Centrally, the WBC Early Years Team (supported by other central service referred to above, as appropriate) fulfils the following statutory duties under S.5,7&9 of the Childcare Act (2006):

- To secure sufficient childcare places, so far as is reasonably practicable, for working parents or parents who are studying or training for employment, for children aged 0-14 (or up to 18 for disabled children)
- To take into account what is 'reasonably practicable' when assessing what sufficient childcare means in their area
- To effectively administer processes for the 2,3 and 4 year old funded entitlements in line with published guidance and spend criteria

¹ As deemed by the Office for Standards in Education (OfSTED)

² Either by Ofsted inspection outcomes, or in the absence of a first inspection grading

³ Dfe (2017) Early education and childcare: Statutory guidance for local authorities

- The quality of the local childcare market, including the demand for specific types of providers in a particular locality and the amount and type of supply that currently exists
- The quality of the labour market
- To support schools in their area to offer out-of-hours childcare from 8.00am and 6.00pm
- To support providers to expand their provision and new providers to enter the local childcare market
- To report annually to elected council members on how they are meeting their duty to secure sufficient childcare, and make this report available and accessible to parents

They do this by:

- Working with existing and proposed childcare providers to secure sufficient childcare based on local evidenced needs of families
- Providing support to settings⁴ that achieve a RI or Inadequate Ofsted grading, or those not yet registered/inspected, with a view to improving quality. This is offered face-to-face, both in-setting (where appropriate) and through group forums (e.g. Childminder forum, Lead Safeguarding Practitioner Forum, SEND forum, Out of School Cub forum)
- Offering training for settings within the statutory areas of the EYFS, SEND or Safeguarding, or where there is an evidenced need within children’s learning and development outcomes locally
- Leading the overview, management and administration of the funding processes for 2, 3 and 4 year old funding, including the extended 30-hour entitlement
- Management of the moderation process for EYFSP data
- Supporting out of school / breakfast and holiday clubs
- Monitoring, reviewing and taking corrective action in respect of children’s learning and development outcomes – particularly of those children who face additional vulnerabilities (e.g. pupil premium, 2 year olds, those living in disadvantage, SEND)
- Providing Information, Advice and Support to families seeking childcare
- Leading on a strategy to ensure school readiness across the Borough

Wokingham Borough Council Early Years Service currently delivers an enhanced offer over and above its Statutory duties. The revised statutory guidance specifically states that LA Early Years’ services should focus their attention upon newly registering settings and those who are not graded ‘Good or Outstanding’:

“...for the following providers: those registered on the Ofsted Early Years Register who are judged less than ‘good’ in their most recent inspection report; newly registered providers on the Ofsted Early Years Register who have not yet had an inspection report published; those on Part A (the compulsory part) of the Ofsted General Childcare register who are assessed by Ofsted as not having met the requirements of registration or the requirements relating to their activities” Pg.32

However, in order to prevent a likely decline in quality if WBC support only those settings who attain a ‘Requires Improvement or ‘Inadequate’ grading, a termly risk assessing process has been implemented (commenced Jan 2018), which assesses each setting against a set of criteria (see Appendix A) that includes indicators of risk for judgements of quality.

The risk assessing process categorises settings accordingly to their likeliness of achieving an Ofsted grading less than Good, and a standardised package of support (see Appendix B) is offered based on this risk assessing outcome. WBC also facilitates termly group-based forums specifically for Childminders, Lead Safeguarding Practitioners, SENCOs and Out of School Clubs. A Managers Forum has also recently been re-established.

⁴ Childminders, Settings, Pre-schools, Nursery Schools and Nursery/Reception classes in Primary or Infant schools

The statutory guidance further states that training provided should be limited to that which has a documented need (statutory EYFS; SEND / Safeguarding):

“Secure information, advice and training for providers in their area on the following matters: meeting the requirements of the Early Years Foundation Stage; meeting the needs of children with special educational needs and disabilities, vulnerable and disadvantaged children; and effective safeguarding and child protection.” Pg.32

WBC Early Years Service therefore offer a revised training programme which included these core aspects, but additionally includes practice-based topics, where there is an evidenced need.

Wokingham delivers its duties, with >95% of settings graded Good or better. Furthermore, Wokingham children achieve higher than their national counterparts by the end of the Foundation Stage. Parental satisfaction is very good, and the percentage of eligible children accessing their free early education entitlements is well above the national averages at every stage. Children/families who are eligible for a funded place, have access to one. The take up of the 30-hour free entitlement has been good, and 85% of settings and 60% of childminders now offer this extended entitlement, which affords flexibility and choice to parents. Recent changes made within the Early Years and Childcare Service working practices mean that Wokingham Borough Council sustains, maintains and improves on these outcomes whilst only retaining 80% of the amount it is allowed to retain from the financial resource allocated to it. Thus, this allows a higher percentage of monies received to be passed through directly to early years providers in Wokingham.

Appendix A

RAG Rating Criteria

Three outcomes will be possible; Bronze, Silver or Gold. 'Bronze' represents a need for the setting to have the highest level of support. 'Gold' represents settings that will receive the lowest level of support. 'Silver' represents settings who may require additional support for a short space of time, for a specific issue, or with multiple 'low-level' concern indicators. The aim with Silver settings is that intervention is provided before there becomes a risk to a reduction in quality.

*Settings with an 'Inadequate' inspection outcome will automatically be considered 'Bronze'

**Settings with a 'Requires Improvement' inspection outcome will automatically be considered 'Silver'

If neither of the above apply, settings with at least one of the following indicators will be considered 'Silver'
Settings with 3 or more of the following indicators will automatically be considered 'Bronze'.

Due an Ofsted inspection with next 12 months
Manager been in post <6 months, is qualified at level 3 or below, or with < 2 years experience
Setting has been open less than 1 year
Setting has been taking 2 year olds for < 6 months
Setting is operating at <65% occupancy
Safeguarding Lead has not yet satisfactorily completed relevant training
SENCO has not yet satisfactorily completed relevant training
At least one LADO involvement with the setting in the past 12 months

Appendix B

Offer of support to settings, based on RAG rating outcome

Bronze	Silver	Gold
<p>Access to Practitioner Pages web portal</p> <p>Access to WBC Early Years training package at reduced rate</p> <p>Face-to-face review of Annual Compliance check audit – to support/inform the FIP</p> <p>Invited to attend termly cluster update meetings</p> <p>Monthly support meetings to review progress against a Focussed Improvement Plan</p> <p>Support to develop a robust 'Focussed Improvement Plan' (FIP) with SMART targets.</p> <p>Access to remote support (telephone / email) fortnightly if required</p>	<p>Access to Practitioner Pages web portal</p> <p>Access to WBC Early Years training package at reduced rate</p> <p>Telephone review of Annual Compliance check audit with setting</p> <p>Invited to attend termly cluster update meetings</p> <p>3 x 0.5 day visits per year, with written report giving clear actions and recommendations</p>	<p>Access to Practitioner Pages web portal</p> <p>Access to Statutory Element of WBC Early Years training package at reduced rate</p> <p>Provision of the Annual Compliance Check audit tool, for the setting to self-review</p> <p>Invited to attend termly cluster update meetings</p>

This page is intentionally left blank

TITLE	Growth Fund Update
FOR CONSIDERATION BY	Schools Forum on 18 July 2018
WARD	None Specific
DIRECTOR	Director of Corporate Services - Graham Ebers Interim Director of Children's Services - Lisa Humphreys

OUTCOME / BENEFITS TO THE COMMUNITY

That there will be sufficient school places for Wokingham resident children.

RECOMMENDATION

That Forum:

- (a) approves the 2017/18 overspend of £81,030 be carried forward to 2018/19 year, and
- (b) notes the planned programme of expenditure, as set out in this report, which together with the 2017/18 overspend totals £798,737.

SUMMARY OF REPORT

The planned programme of spend and the 2017/18 overspend can both be funded from within the allocated £800,000.

The carry forward deficit (£81K) is the consequence of costs arising from commitments for the 2016/17 financial year that were met in the 2017/18 year. These were identified late in the 2017/18 year, after the 2018/19 budget had been agreed.

Changes to the original planned spend in 2018/19 are as follows:

£1,501 for Loddon Primary School to reflect deprivation factor payments that would have been received had the school been paid through the formulaic payment mechanism for the period 1st April 2017 to 31st March 2018. This is for the Year 1 class that opened in 2016. Mid-phase classes are expected to start at a small size and grow year by year, putting the school at a financial disadvantage if the only additional payment is for AWPU.

£24,332 for Beechwood Primary School is in recognition of additional short-term costs (balanced by long term savings) due to the accelerated expansion of the school. The school is now expected to open a new class every year; rather than a new class every other year (see below for further explanation).

£30,000 for the initial payment for the pre-opening grant for the Shinfield West Primary School. This reflects the need to defer the opening of the school to 2019.

-£50,126 to reflect reduced contingency for mid phase capacity. It is likely that a single Year 2 class will be required in 2018/19.

Long standing commitments to pay for additional classes at Colleton, Grazeley, Shinfield St Mary's, Loddon, Highwood and Beechwood schools (£235,210) and for diseconomy and new class funding at Windmill, Wheatfield, Montague Park and Bohunt Schools (£378,000) and a reduced contingency of £48,664 to fund a prospective new Year 2 class make up the balance.

Background

The growth fund exists to fund or part-fund the planned expansion of the number of school places in response to rising demand (known as Basic Need). New Academies receive diseconomy and class start-up funding from the Growth Fund. Funding of places is normally made through the formulaic arrangements, but using estimated rather than historic actual rolls. For other schools, for a new class in a normal year of entry, the Growth Fund is for planned additional places up until the point where formulaic lagged funding is available to a school. Where a new mid-phase class is agreed the current arrangement is that funding is provided for the gap between 95% of the planned additional capacity and the actual roll on the October census day, for the financial year after the opening of the school.

The growth fund estimates (Appendix A) includes allowances for planned spend in the period 2018/19. This includes for the expansion of six maintained primary schools, for four primary Academy / Free Schools and one Free Secondary School.

Analysis of Issues

The 2017/18 deficit (carried forward into 2018/19) largely relates to 2016/17 commitments that were not fully understood until late in the 2017/18 year. At the time of the October 2017 report to Forum a surplus of £158,193 was forecast (£1,300,000 budget, less spend of £1,141,807). Since that report the following additional costs have been identified:

Surplus as at Oct 17	(158,193)
Floreat Silver Meadow	£105,515
Bohunt	£ 40,847
Montague Park	£ 34,965
Windmill Primary	£ 31,703
Charvil Piggot	£ 17,800
Wheatfield Primary	£ 5,478
Loddon Primary	£ 1,502
Other minor adjustment	£ 1,413
Total additional spend	£239,223
Variance	£81,030

These costs reflect the difficulty of administering bespoke agreements made in earlier years. The newly agreed arrangements, being based on common, straightforward formulaic adjustments to meet diseconomy funding, with (for new Free Schools and Academies) and with new class funding being delivered through estimated roll funding within the funding formula are expected to deliver better financial management and reliable reporting.

The deferral of the opening of the Shinfield West Primary School to 2019/20 reflects both a low number of first preference applications for that school and an assessment of the likely position in the Shinfield area on offer day. If the Floreat Trust has incurred reasonable pre-opening costs these will need to be met from the allocated budget. There are two issues here. Firstly, the number of children born in the year feeding the 2018/19 Reception Year was exceptionally low (but has increased in the subsequent two years). Secondly, the new housing developments in the area have not as yet

produced sufficient children to make the development viable. However, there are now a number of development sites in the Shinfield area that are seeing significant levels of new home construction and sale. The largest of these is the Shinfield West area where the new school is sited. Nearly 500 additional homes are expected to be completed in the period from April 2018 to August 2019 in Shinfield so it is prudent expect and plan for a need for increased demand next year.

The additional payment for Loddon Primary school (Appendix B) provides a 6% uplift to the additional funding (for the gap between 95% of AWPU funding for the planned roll and the actual roll) for the period 1st April 2017 to 31st March 2018 for the Year 1 class that opened in September 2016. This reflects the uplift in funding that would have occurred through the funding formula had the new capacity been taken up by children on roll on the date of the October 2016 census. The capacity was taken up, but after the census date. This was expected because mid-phase places are only taken as and when applications as made. Even though some parents would have taken these places before their child's school career commenced they do not wish to change their child's school after this point. This shortfall in funding lasts for the whole financial year after the opening of the class. This can be contrasted with the established arrangement for the 7 month period after a new class starts whereby schools receive all the AWPU for the new capacity and only for 7 months (at which point the expectation (for a new Reception / entry to school class) was that the class would be self-sufficient, based on formulaic funding.

The Beechwood funding is due to demand for places in the Woodley area leading to the opening of new classes at an accelerated rate. The standard funding arrangement, based on forward funding the agreed additional places, effectively funds a new class opening every two years, from the second year onwards, with expansion completing in 2022. In the initial year (2016) the school hosted two classes of 30 Reception age (where previously it had two smaller classes totalling 45). In the second year (2017) these children moved up into Year 1, so there was a need to open a new Year 1 class. Therefore, there were four classes, rather than three across Years 1 and 2. By this point the school had benefited from additional Growth funding for two years on the basis of 15 additional pupils per year. The original working assumption was that the Year 2 classes would be undersized and so in the third year (2018) the only change would be that there were two full Year 2 classes but Year 3 would be unaffected.

In fact, in the second year (2017), the smaller Year 2 classes filled up. At this stage no extra class was required over original expectations (so still only one additional class in Years 1 & 2).

However, in the third year (2018) the additional Year 2 children progressed to Year3, prompting the need for an additional Year 3 class (so 4 classes across Years 3 and 4). This is an additional teacher over and above the planned level. Given the level of demand for mid-phase places the smaller Year 4 classes may also fill, so the additional Year 5 / 6 class is required in 2019. This would complete the expansion of the school three years earlier than planned.

The payment takes account of both the limited resources in the growth fund and the formulaic funding available to the school as a result of growth in previous years,

The Growth Fund includes provision for additional capacity, labelled as "bulge classes". There is a case for additional places in both Key Stage 1 and 2. There is a case for

additional Year 2 capacity this September, preferably making use of capacity created by recent expansion works. Additional Key Stage 2 capacity can be created by offering places over 30 per class. Schools are not bound by either their original Published Admission Number after the initial year of entry or Infant Class Size Legislation after that point.

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)	£ 798,737	YES	Revenue (DSG)
Next Financial Year (Year 2)	N/A	N/A	Revenue (DSG)
Following Financial Year (Year 3)	N/A	N/A	Revenue (DSG)

Other financial information relevant to the Recommendation/Decision
N/A

Cross-Council Implications
N/a

List of Background Papers
N/A

Contact Piers Brunning	Service Education
Telephone No Tel: 0118 974 6084	Email piers.brunning@wokingham.gov.uk

Appendix A
2018-19 CM Growth fund analysis under new scheme

Table A																
Key stage 1 Awpu										2780.81	30	83424.3	Full yr 7/12th			
										A	sept					
Schools - New classes	Year left	Number	Original budget	Start	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Estimated Total	Additions	Reason	Total estimate as at 31st May		
Carried forward deficit from 2017-18											81,030			81,030		
Colleton	2	25	57,238	2012					40,553		40,553			40,553		
Grazeley		15	24,332	2014				24,332			24,332			24,332		
Shinfield St Marys		30	48,201	2015			48,664				48,664			48,664		
Loddon		30	48,664	2016		48,664					48,664	1,501	Payment for deprivation funding for planned long-term small sized mid-phase opening class.	50,165		
Beechwood		15	24,332	2016		24,332					24,332	24,332	Reflects the impact of the expansion programme operating by paired year groups, rather than in single years, as originally expected. The total spend is not affected. Note that the school spend is not discretionary, if class sizes are to be kept close to 30.	48,664		
Highwood		30	48,664	2017	48,664						48,664			48,664		
Contingency for bulge class if required**		75	121,660		98,790						98,790	-50,126	Contingency for bulge classes reduced	48,664		
			251,431								415,030	-24,293		390,737		

Table B															
Basic need new and growing schools (funded on estimates)															
										* sliding scale					
Diseconomy of scale (new classes funded from APT)	secondary	500	lump sum	125,000	93,000	62,000	31,000								
Per Pupil funding	500														
Per Pupil funding	Primary	250	lump sum	80,500	67,500	54,000	40,500	27,000	31,000						
Per Pupil funding	250														
	Empty year group	NOR													
Windmill	30	1	102,459	2013					34,500		34,500			34,500	
Wheatfield	30	2	89,087	2014				48,000			48,000			48,000	
Montague Park	30	4	84,503	2016		82,500					82,500			82,500	
Bohunt - Sec school 5 year groups	240	3	417,153	2016		213,000					213,000			213,000	
Shinfield West Primary School	0			2018							0			0	
													Allowance for the pre-opening initial grant for the 30,000 Shinfield West School	30,000	
Total Academy											378,000	30,000		408,000	

NOTE:

Estimated spend as at May 2018		793,030	5,707	798,737
Budget Requirement	800,000	800,000		800,000
Variance Deficit (+) Surplus (-)		-6,970	5,707	-1,264

TITLE	School Admissions Report
BY	Carole Burrow – Customer Delivery Lead Jackie Whitney – Lead Manager, Customer Management
FOR INFORMATION	Schools Forum
DATE	28 th June 2018

SUMMARY

Update and common trends around School Admissions over the last academic year.

1. Purpose of the Report

The purpose of this report is to provide members of the Schools Forum with an overview of the work of the school admissions service over the last 12 months. The report identifies the activity delivered to address the challenges facing the service and seeks School Forum approval to fund the function. The budget was reduced from £304k in 2017/18 to £289k in 2018/19. The team were working with reduced team members due to the ongoing 21st Century restructure and the need to hold vacant posts during the transition. Following the restructure, this saving has remained and no new posts have been created, however resilience for front line customer interactions will be maintained. The team forms part of the Customer and Locality Services directorate.

As Wokingham continues to be rated one of the best places to live in Britain there will always be a demand for school places. In processing applications, the school admission team are responsible for validating and processing all applications. The team adheres to strict deadlines, documented within the Wokingham Borough Council published admission arrangements, set in line with the statutory governance of the School Admissions Code. This includes in year applications from parents from outside the Borough and validation of data from other authorities in respect of main cyclical processes.

Admission authorities must set their admission arrangements annually, following public consultation, and once determined publish them. These enforce the guidelines that the team must adhere to. This includes the main cyclical processes for Entry to Primary, Infant to Junior and Primary to Secondary Schools, as well as in year applications and, where any application is refused, the subsequent appeals process. This responsibility is currently discharged by the WBC Strategy and Commissioning Team (Place), who act as senior specialists and set direction, leading on admissions arrangements, providing advice on

admission policies and respond to Government Agency information requests. The long term arrangements for holding these responsibilities are subject to ongoing review.

School admissions needs to work closely with this team, sharing knowledge and seeking advice and guidance when necessary. The Senior Specialist within Strategy and Commissioning and Lead Officer Governor Services are involved in the co-creation of guides for parents.

All admission decisions must comply with the School Admissions Code and the team is trained to provide advice and guidance in respect of current Government legislation to parents, schools and Council colleagues who provide support.

2. Report Summary

The school admissions service has continued to meet a range of challenges driven by the nature and level of its work, particularly in relation to in-year admissions, fair access and appeals. This has been exacerbated by the shortage of places in some year groups and with the increasing demands of parents.

When school admissions moved across to Customer Service in 2017, a review was undertaken of all school admissions processes, workload, technology and resources. Improvements across all areas were implemented and as a result, the service has become more efficient. The admissions team now structurally sits within, and forms part of, the wider Customer and Locality Services directorate. This enables the team to maximise support and resilience, using the skills of a customer management function who deal with initial customer interactions. The aim is to resolve as many questions and queries at first point of contact as possible. The service can be contacted via the telephone, web chat, face to face or email, with support provided from the admissions team for more complex enquiries, especially those in respect of the legal framework or prescribed published timelines.

In 2017 (Jan-Dec) the customer services team dealt with 6315 calls, 626 web chats and 220 emails, for school admissions. Before school admissions joined customer services, they were receiving around 20,000 calls per annum. Most of these were repeat callers trying to get through to busy phone lines. At that time, the team could only answer 9500 of these calls, and did not have the ability to offer alternative contact channels such as web chat.

By partnering with the wider customer service team has meant a significant increase in the school admissions team's ability to deal with applications, and continue to make allocations within statutory timescales. Further improvements and efficiencies have been:

- Upgraded technology allowing customers to apply online, at a time and place that suits them (ensuring that this is a safe and secure service)
- Families receiving their offers online, which can also be accepted online
- Auto acknowledgement emails sent to families confirming receipt of applications

- Reduction in print costs, signposting families to online information wherever possible i.e. parent guides
- Emailing correspondence, such as offers thus reducing the number of paper responses
- Some automated checking, saving time for the team
- Process efficiency has led to a reduction in team members, leading to cost savings – albeit increasing demands in other work such as in-year applications and appeals, are now impacting on the capacity of the reduced resources to deal

There has also been some development of a new fair access protocol. This is critical to improving the in-year admissions process for some of the most vulnerable and challenging children, improving the effectiveness of the fair access system, improving relationships with schools and supporting compliance to the School Admissions Code. This area is a priority for the wider education system.

Further improvement and modernisation is required, over the next 12 months, which will include a review of the production of parent guides, traded services, review of back office technology, back office processes and re-design of the team structure in line with the 21st Century reorganisation.

3. Introduction & Background

The School Admissions team provides the following key functions:

- Primary & Secondary normal admissions round
- Infant to Junior normal admissions round
- In-year admissions
- Fair Access and Vulnerable Pupil Protocol support
- Managed Moves Liaison
- Appeals
- Pupil tracking

There were 56 on-time bulk secondary appeals in 2018 which was an increase from 24 in 2017. This does not include the figures for Oakbank or Bohunt (who now present at their own appeals), or for St. Crispin's who now use Brackell Forest Council to support their appeals. More appeals were actually withdrawn or settled which was partly due to Bohunt school's appeals all being allowed at Stage 1 and the fluidity of movement after the main allocation. As all parents refused a place at a preferred school are able to appeal for multiple maintained or certain academy schools, we cannot predict either the demand or regularity of appeals, but trained staff will need to be available should the need arise as this is a legal requirement of the Local Authority.

A summary of appeals outcomes for 2017 can be seen in appendix 1.

The number of 2018 primary bulk appeals at 24 being lodged is the same as last year. This is despite the decrease in the birth population and space

availability across the local authority, so represents the demands of the parents within and outside the Borough to secure a preferred school place.

Any level of appeals puts additional pressure on the service, including its ability to meet statutory deadlines. The present level will be a challenge to sustain within the current arrangements as limited team members are trained and experienced in presenting appeals. As demand for our Traded Services increases, so does the demand to present at appeals for academy schools/trusts. Without the right level of resource we may be unable to continue generating increasing funds, whilst building relationships with the schools/academies to support their admissions and appeals functions.

In-year admission activity amounted to 1690 applications in 2017/2018 and we have also processed 1171 applications up to the end of May 2018 - not taking into account our busiest period from June until the beginning of September. Evidence in Wokingham and neighbouring authorities suggests these figures include an increased number of families moving to the areas from abroad. This will put additional pressure on both schools and the school admissions service to deliver on statutory obligations.

Secondary Transfer September 2018 intake – offers as at 1 March 2018

2790 applications processed for children living in the Borough or residing elsewhere transferring to secondary school in 2018 (the majority expressed four preferences that were validated by the team)

2001 places were allocated at Wokingham schools - of which:

95% applications were made on-line (3.1% increase on the previous year)

1631 (81.51%) were offered their first preferred school

1944 (97.15%) were offered one of their preferred schools

Reception 2018 intake – offers as at 18 April 2018

2155 parent/carers submitted an application requesting a reception place for their child for September 2018. (the majority expressed four preferences that were all validated by the team)

87.57% applications were made on-line

1885 (90.23%) were offered their first preferred school

2074 (99.23%) were offered one of their preferred schools

Infant to Junior 2018 intake – offers as at 18 April 2018

582 allocations were made for a place in a junior school for September 2018

88.8% applications were made on-line

574 (98.63%) were offered their first preferred school

580 (99.66%) were offered one of their preferred schools.

Checks, balances and validation are required to ensure that all requests are dealt with fairly and effectively, with any misleading applications identified promptly. Four senior officers are trained to present at appeals. These are becoming more complex and time consuming in view of limited place availability in some areas/year groups. The team also answers e-mails in respect of admission enquiries which require knowledge of all the legislation and published admission arrangements. The number received by the team varies each month and is recorded by the Customer and Locality Service - *appendix 1*. The highest number per month recorded this year was in March 2018 when the team in-box received 2427 e-mails. This does not include those enquiries made to individual team members, from other Council departments, or from Local Authority Members seeking advice for their constituents.

The purpose of the Fair Access Protocol is to ensure that outside the normal admissions round, children without school places, especially the most vulnerable, are admitted to a suitable school as quickly as possible. The protocol is triggered when an eligible child has not secured a school place under in-year admission procedures. In 2017/18, the Lead Officer dealt with 8 referrals (7 primary and 1 secondary). This figure is subject to meeting the needs of the most vulnerable students but statistics may change as a result of the implementation of the new Fair Access Protocol and how it is applied/operated by the schools and Local Authority.

It is imperative that school admissions fulfils the statutory admissions service for parents and all schools in accordance with the School Admissions and School Admissions Appeals Codes. Own admission authority schools (academies/free schools) may participate (as determined in school admission policies) in elements of the admissions process as part of the Traded Services Agreement. This includes:

- Acting on behalf of the school at appeal
- Advice and guidance on admission arrangements
- Allocation services (transfer group and in-year)
- Monitoring of wait lists and subsequent allocations
- Distance routines/validation checks/council tax checks

In providing this service, we liaise closely with schools to ensure we provide a timely and quality driven service, delivering a process that is fair whilst using specialist admissions software. This saves school staff time and ensures that such school are compliant with the School Admissions Code. The traded services fees generated for 2017 amounted to £16,051.35, which is above the figure of £14,170 forecast for the

year. With new multi academy trusts evolving, it was anticipated that with team members and systems to support, more funds could be generated, however there is a risk that this may no longer be the case moving forward due to the pressure on the teams capacity.

4. Service Modernisation and Improvement

The service requires a focus on back office technological improvements to meet the range of team challenges that have arisen over the last two years. The team is now smaller than two years ago. There will be a first point of contact team in the new operating model, (Customer Management) who will continue taking these interactions to support the operational activities surrounding admissions to ensure they are completed within the published deadlines. Any improvements were not because of the move to Customers Services – e-mail volume continues to be high as customer service staff are unable to answer complexity of enquiries.

5. National and Statutory Context

All school admission services make an important contribution to the safeguarding of children and young people by ensuring that every child is offered a school place. Wokingham and other local authorities track children who are out of school because their parent/carer has refused a school place, and take appropriate action. Good working relationships with Education Welfare, Special Educational Needs Team, Fair Access Panel and our Virtual Head for Looked After and Previously Looked After Children, as well as our schools, allow us to support the most vulnerable students in the Borough.

The admission service provides and supports the provision of a range of statutory requirements as identified within the Schools Admission Code 2014. It should be read alongside the School Admission Appeal Code and other guidance as this law affects all admissions and admission appeals in England. The Code imposes mandatory requirements and includes guidelines setting out aims, objectives and other matters in relation to the discharge of functions relating to admissions by the bodies listed below:

- a) **Admission authority of maintained schools** as defined in Section 88 (1) (a) and (b) of the SSFA 1998
- b) **Governing bodies and local authorities (when not admission authorities)**
- c) **School Adjudicators**
- d) **Admission Appeal Panels**

These bodies have a statutory duty to act in accordance with the relevant provisions of the Code.

All Academy Schools (including those that are Free Schools), University Technical Colleges and Studio Schools are required by their funding agreements to comply with the Code and the law relating to admissions.

It is the responsibility of admission authorities to ensure that admission arrangements are fair and compliant with this Code. Where a school is the admission authority, this responsibility falls to the governing body or Academy Trust.

The table below identifies the types of school with related governance and admission authorities.

Type of school	Who is the Admission Authority	Who deals with complaints and arrangements?	Who is responsible for arranging/providing for an appeal against refusal of a place at a school?
Academies	Academy Trust	School Adjudicator	Academy Trust
Community Schools	Local Authority	School Adjudicator	Local Authority
Foundation Schools	Governing Body	School Adjudicator	Governing body
Voluntary aided schools	Governing Body	School Adjudicator	Governing body
Voluntary controlled schools	Local Authority	School Adjudicator	Local Authority

It is difficult to find an accurate benchmark to present, as there are significant variations between local authority structures, policy, number of schools and allocation mechanism. Even when compared to our statistical neighbours, this does not give a like for like comparison when analysing data from school admissions functions.

Wokingham does have a high level of demand for school places in relation to its size, with many families moving to the area to secure school places in schools with “Good” or “Outstanding” Ofsted ratings. Most importantly, it has taken pride in the past in delivering an admissions service that other authorities have used as an example of “good practice”.

This page is intentionally left blank

School Admissions Data

April 2017 – March 2018 Summary of current position

- Current budgeted FTE to operationally run the school admissions service – 5.39
- Additional 20 hours per month is paid to the current School Admissions Manager to cover the workload – approx. cost is £500 per month from the DSG. Additional hours paid to CB – this figure is with costs added on. In March 2016, CB agreed to take on the interim post at Grade 8 for 6 weeks – increasing her substantive hours. This was not enough, so post extended + Alan Stubbersfield agreed to pay additional hours on a timesheet basis to support the work until the restructure. This equates to CB working up to 35 hours (30 + up to 5 additional) per week over 4 days which is less than the previous post holder.
- Additional support provided to the team to help manage the volumes, working directly on school admission work: No administrative capacity is provided.
- At an approx. cost of £37,271 which is **not** included within the DSG financial accounting. 0.60FTE is provided by the Wokingham Customer Contact Centre – this has **not** been included within the DSG financial accounting - £15,606. Team receives 20,000 calls per year. Lines were busy, it was reflected that only 9,500 were answered. Phones were diverted during busy times and on allocation days when parents were seeking advice direct from the team – some families had to call back when direct lines were free. Customer services now has First Time Fix this includes those calls that are directed to self-serve on the website and also those directed to send e-mails into the team. Those directed to self-serve could be given the message via an answering system as per other authorities. The interactions in Appendix 1 recorded reflected in the pie charts show the customer service workload and not school admissions.
- Governor Services prepare all the Local Authority Appeals Statements and have done so for some considerable time. Each appeal is likely to take over 2 hours to plan and present involving various team members and does not account for any annual school visits. - this has not been included within the DSG financial accounting - £11,665

- Management support - £10,000 – **not** been included within the DSG financial accounting. Management support was previously included in the budget – the underspend was from March 2016 when the previous Lead Officer left. Her role was purely management and not operational support. When she left the post was not filled but shared out to deal the workload, this was at the same time as other long-term staff members leaving, which left periods of time when the service were not fully staffed with the budget reduced last year as a consequence. Sharing of the workload should have reflected VL and PB within the budget figures but this was not fully identified, as we were going through the 21st Century restructure.
- A saving of 1FTE was made in the team – made possible by using other Council resources, contact centre and Governors services, colleagues working extra hours and moving services online. The saving of 1FTE was not initially planned as it had been anticipated the post would be filled. This is made possible by members of the team taking on interim roles, support from Governor Services, colleagues working extra hours and with the development of on-line services. However, due to the restructure they are currently working without one FTE and the planned staff capacity will reduce further in December 2018. The ability to sustain the workload safely will be in danger especially when we start the coordinated processes for next academic year.
- The DSG Financial position does not reflect the true cost of running the service as this is omitting the additional £37,271 costs the Council is bearing from other areas
- More to do around technology, particularly around back office processes – looking to review over the next 6 months, dependent upon funding:
- Currently a high administrative burden in back office processes – volumes vs time to deal with each activity have been reviewed and refined wherever possible
- No funding provided via DSG to invest in technology improvements, or backfill resources so team members can deliver on technology projects
- The number of school places in certain year groups are stretched, meaning cases are taking longer as the team work with families and schools on suitable solutions
- The team are seeing increasing numbers of in-year applications, with more families moving into the borough due to increases in residential development in the borough

- A further reduction in the DSG would mean that the team are under more pressure, to do more with less, and statutory responsibilities may not be fulfilled

School admissions statistics

- The Council's contact centre deals directly with school admissions enquiries via phone, web chat and email

The level of e-mails the admissions team receives as a consequence of this is high. Appendix 1 (Pie chart) shows the number of tasks completed by customer services but the number of e-mails answered by the team is actually shown as the large figure on the bottom left hand side. No indication is made on the number of calls taken by the team which is less than before, but most authorities now have a front line answering team to support back office workload.

- The aim is to first time fix (FTF) as much as possible, negating the need to transfer to the back office team, and minimise disruption. FTF have created more e-mails into the team direct.
- Monthly statistics on performance are collected and analysed (following slides)
- With all of the aforementioned challenges, the team are still delivering to statutory timescales

Estimated cost of appeals

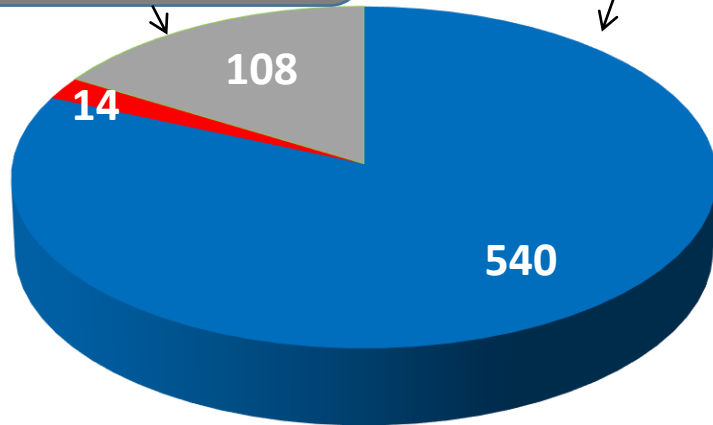
- Takes an average of 2 hours per appeal to process and present – not including dealing with calls or emails interactions. This does not include annual visits to schools.

- Estimated at 0.6 – 1.00 FTE to deal with appeals work, across the service – the range is dependent upon complexity
- Additional assistance is provided by Governor Services. Democratic Services liaise with the team but do not provide assistance as they have to remain impartial from them in respect of appeals.

Total School Admissions inbound interactions

High volume of Webchats in April 17 due to customers needing assistance when completing primary acceptance letter.

57.59% FTF for inbound calls to Customer Services

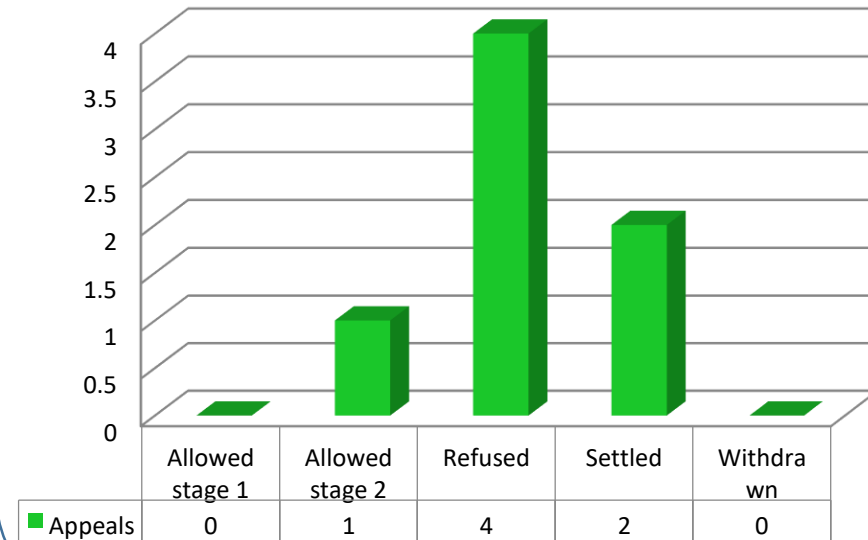


1115 Total emails to School Admissions Team Inbox in April 17

- Inbound Calls
- Inbound Emails
- Web Chats



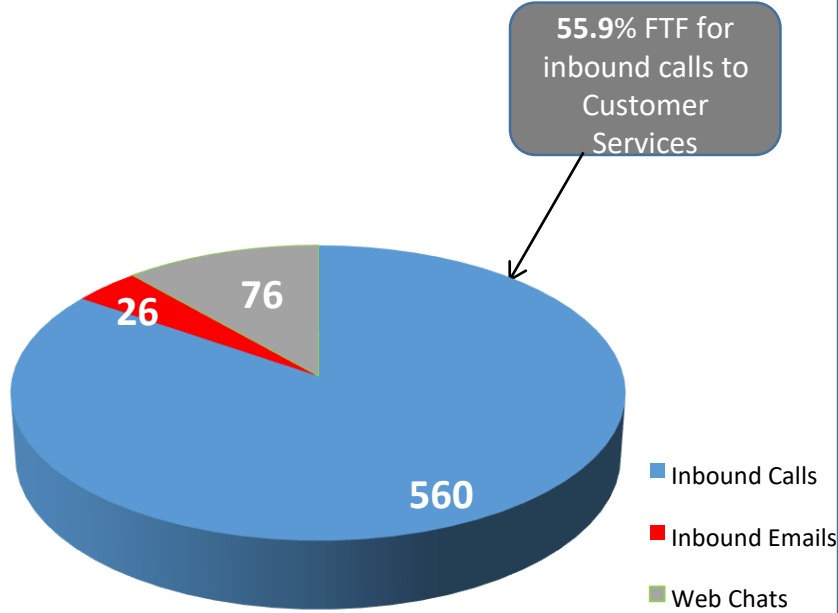
7 School Admissions Appeals in April 17



70 In Year Applications in April 17

- **100%** of In Year Apps Processed within timeline.
- **16** on waiting list allocations.

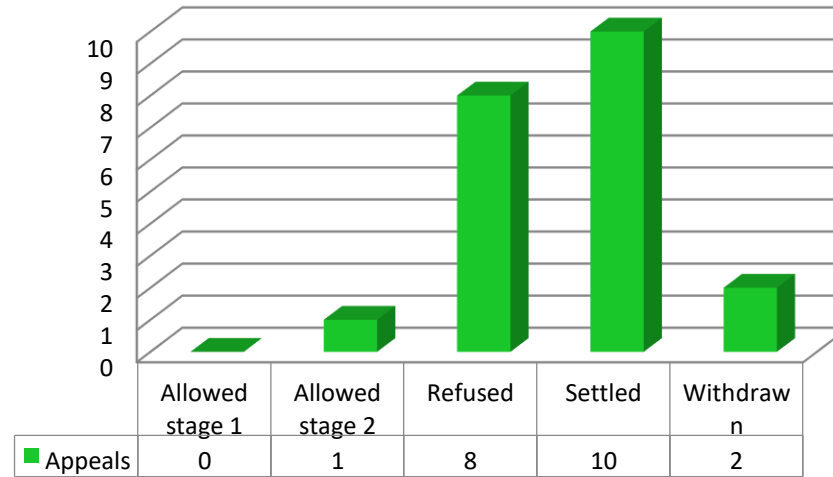
Total School Admissions inbound interactions



1356 Total emails to School Admissions Team Inbox in May 17

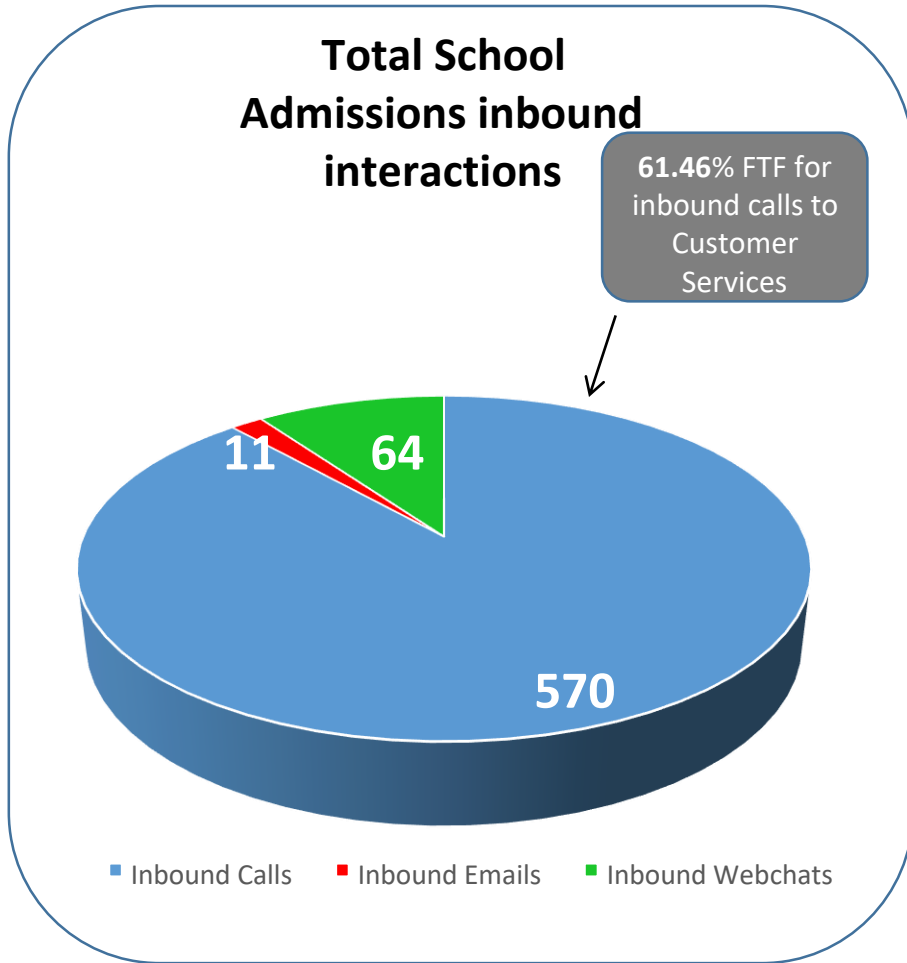


21 School Admissions Appeals in May 17

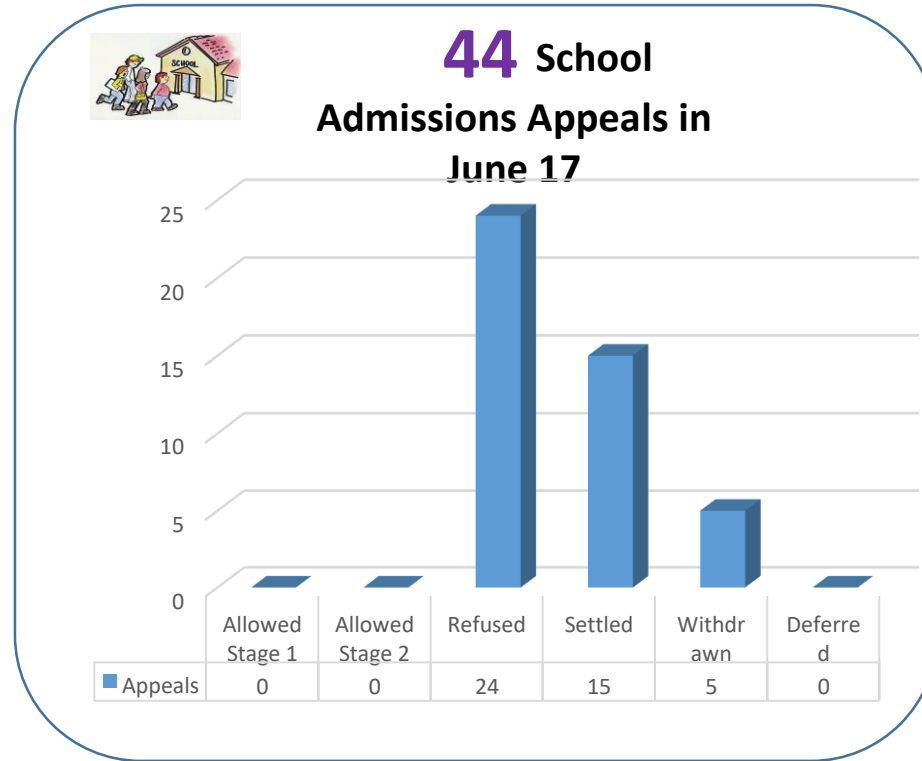


108 In Year Applications in May 17

- **100%** of In Year Apps Processed within timeline.
- **27** on waiting list allocations.



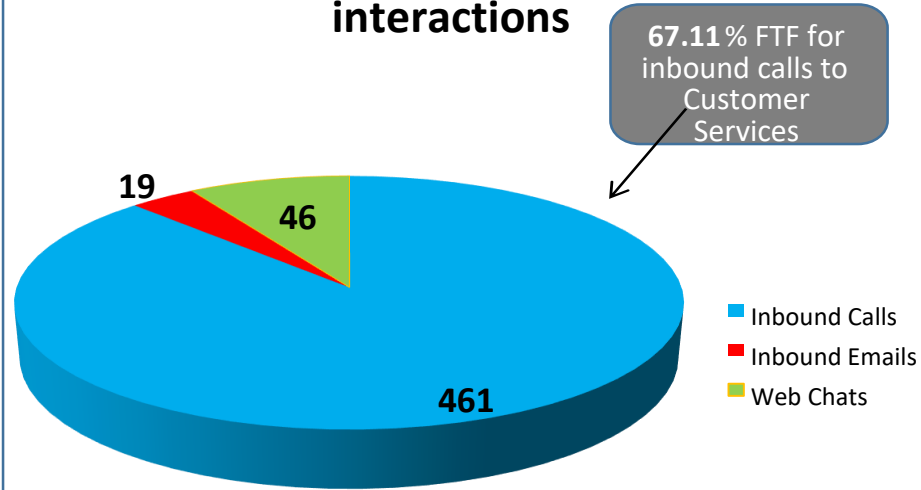
1544 • Total emails to School Admissions Team Inbox in June 17



220 In Year Applications in June 17

100% of In Year Apps Processed within timeline.
37 on waiting list allocations.

Total School Admissions inbound interactions

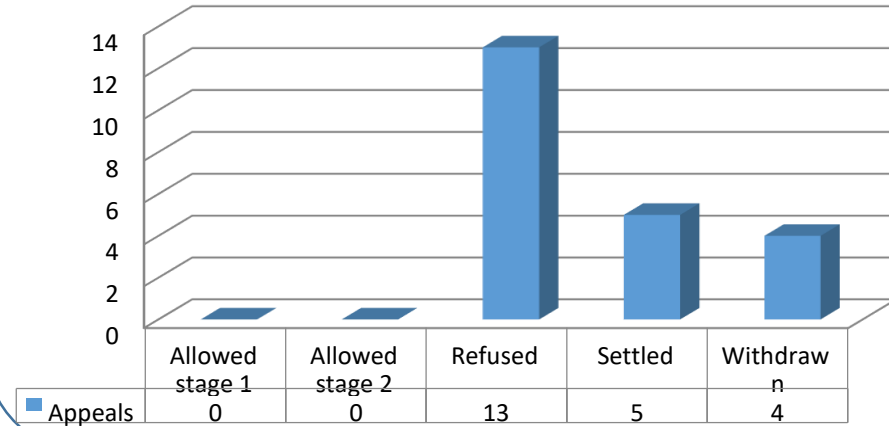


1618 Total emails to School Admissions Team Inbox in July 17

CS Stats July 2017.



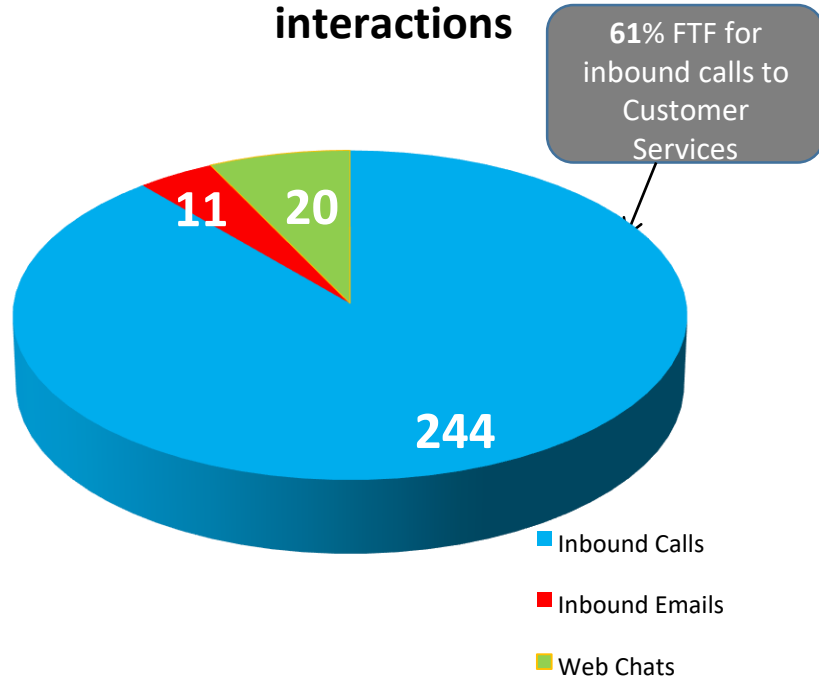
22 School Admissions Appeals in July 17



188 In Year Applications in July 17

- 100% of In Year Apps Processed within timeline.
- 31 on waiting list allocations.

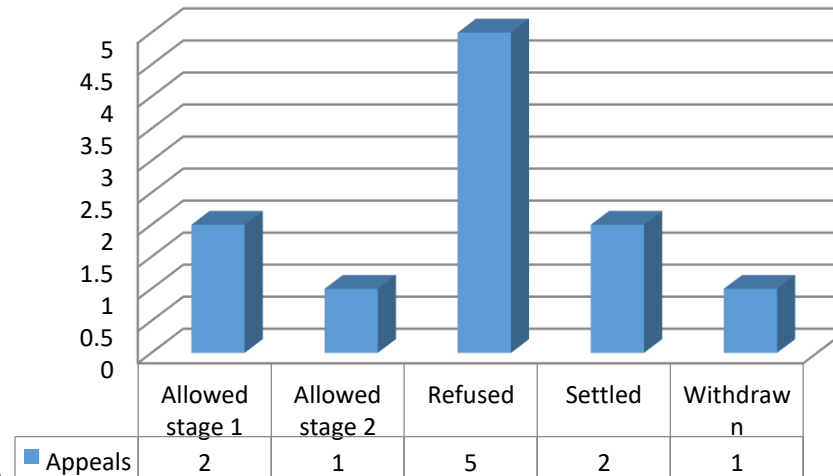
Total School Admissions inbound interactions



1177 Total emails to School Admissions Team Inbox in August 17



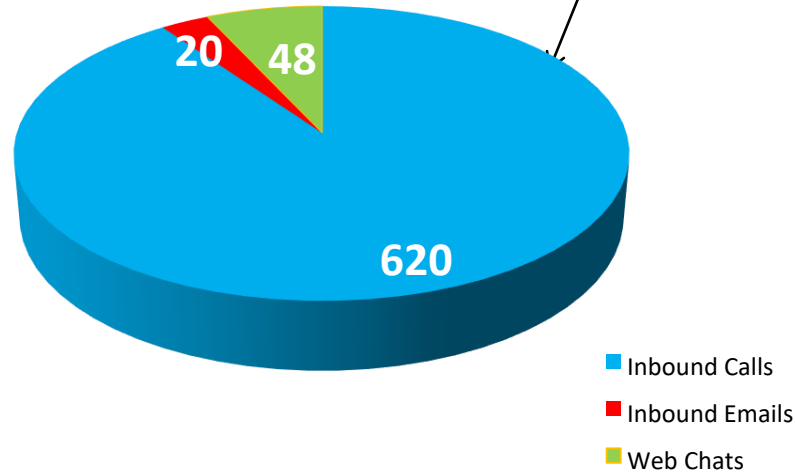
11 School Admissions Appeals in August 17



90 In Year Applications in August 17

100% of In Year Apps Processed within timeline.
36 on waiting list allocations.

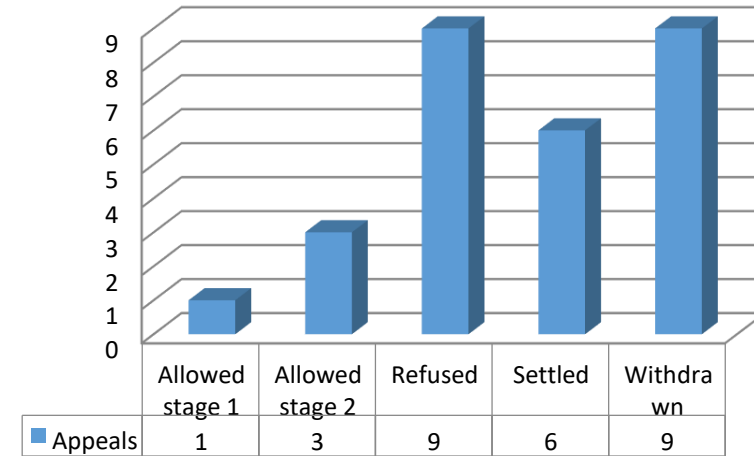
Total School Admissions inbound interactions



1512 Total emails direct to School Admissions Team Inbox in September 17



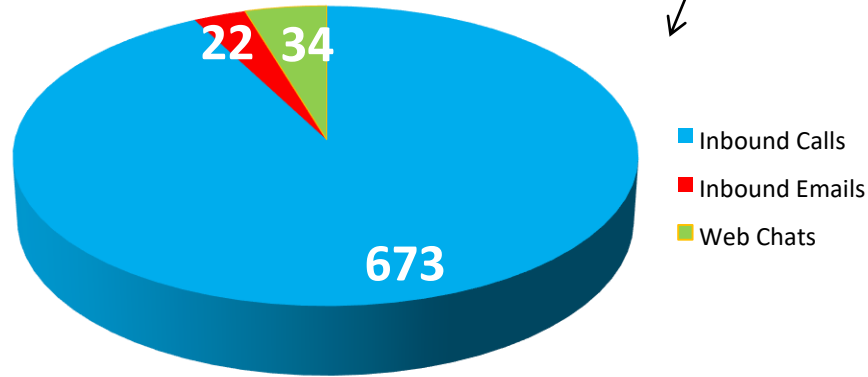
28 School Admissions Appeals in September 17



172 In Year Applications in September 17

100% of In Year Apps Processed within timeline.
42 on waiting list allocations.

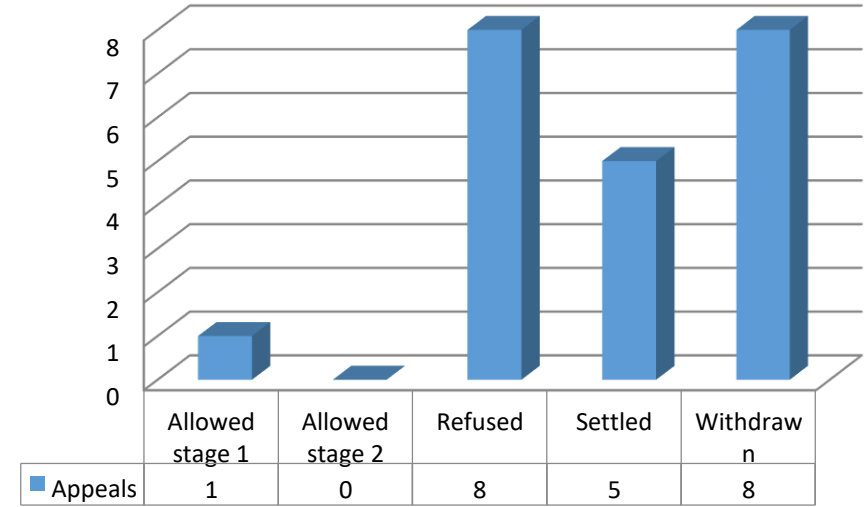
Total School Admissions inbound interactions



2024 Total emails to School Admissions Team Inbox in October 17



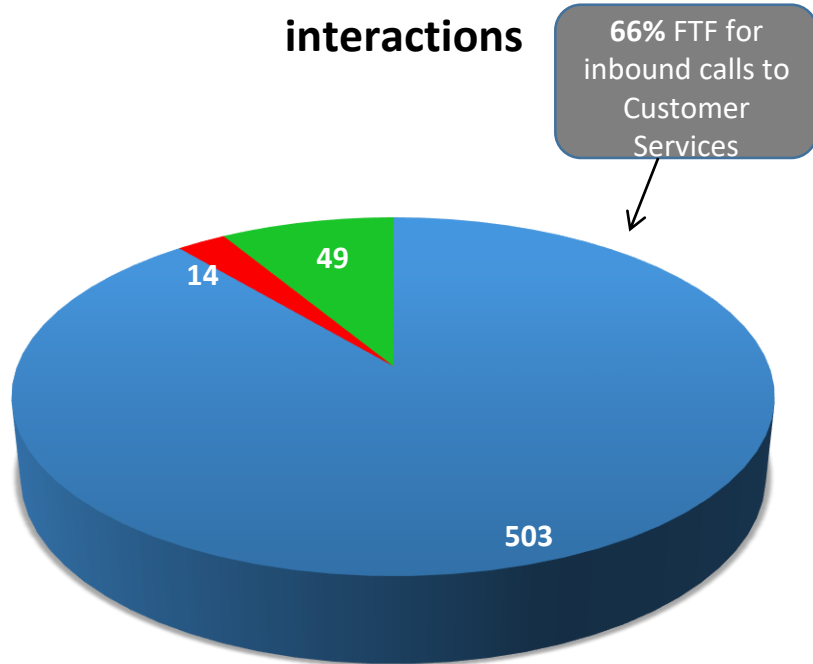
22 School Admissions Appeals in October 17



127 In Year Applications in October 17

100% of In Year Apps Processed within timeline.
40 on waiting list allocations.

Total School Admissions inbound interactions

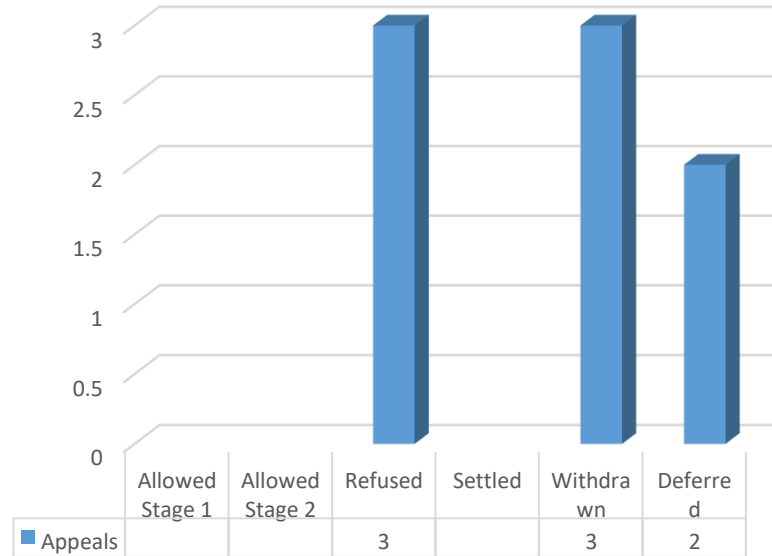


■ Inbound Calls ■ Inbund Emails
■ Inbound Webchats

1386 Total emails to School Admissions Team Inbox in November 17



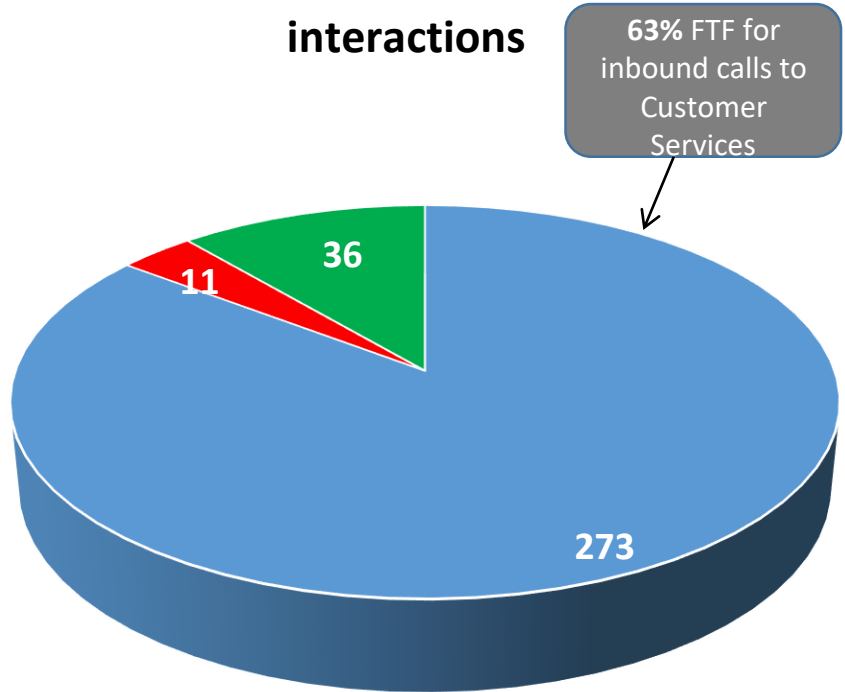
6 School Admissions Appeals in November 17



142 In Year Applications in November 17

100% of In Year Apps Processed within timeline.
 20 on waiting list allocations.

Total School Admissions inbound interactions

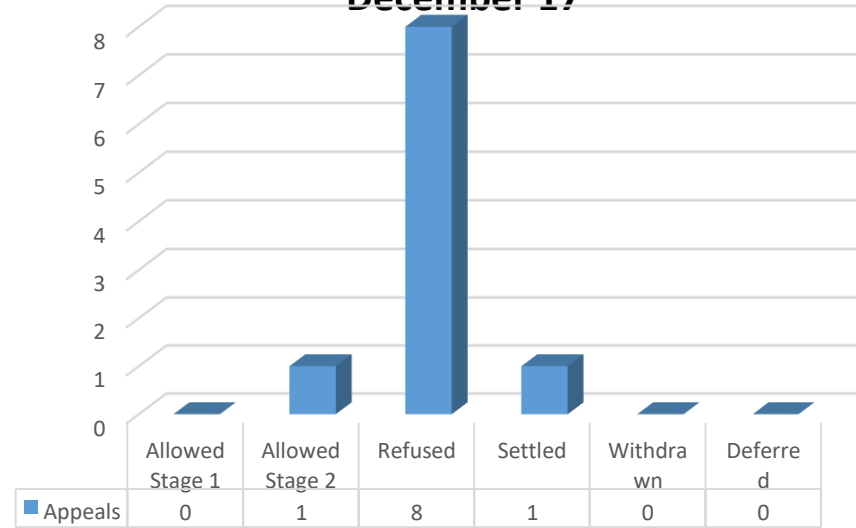


- Inbound Calls
- Inbund Emails
- Inbound Webchats

1254 Total emails to School Admissions Team Inbox in December 17



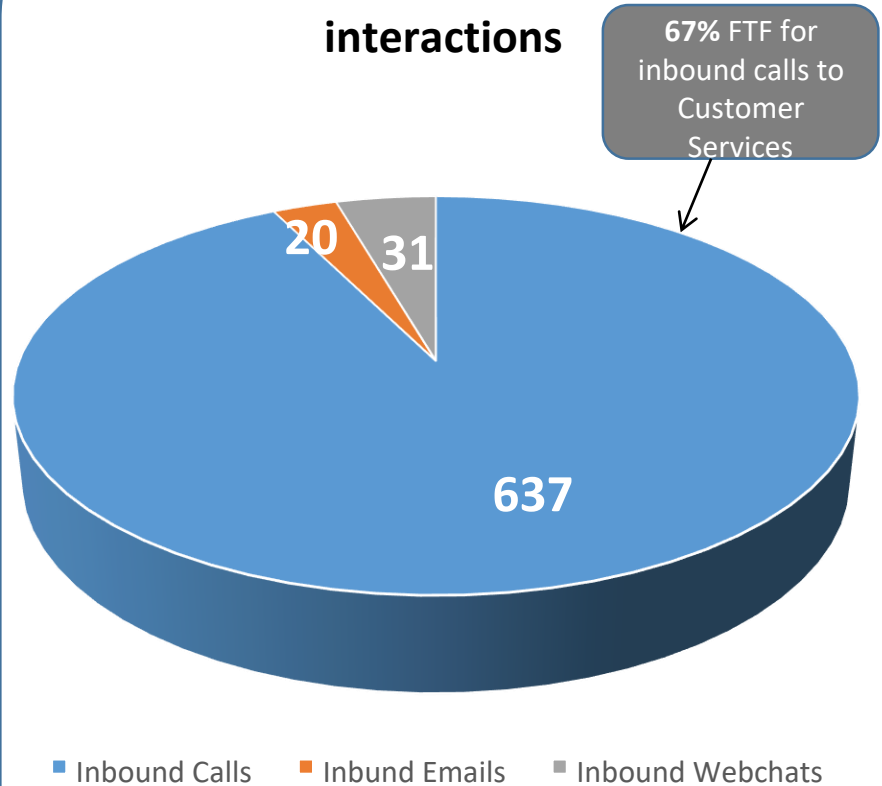
10 School Admissions Appeals in December 17



88 In Year Applications in December 17

100% of In Year Apps Processed within timeline.
23 on waiting list allocations.

Total School Admissions inbound interactions



1954 Total emails to School Admissions Team Inbox in January 2018



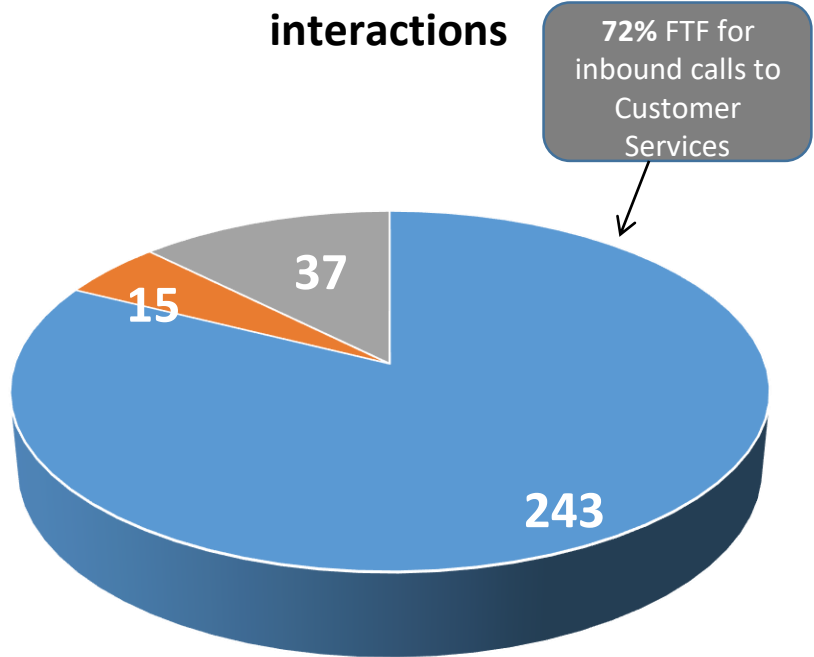
7 School Admissions Appeals in January 2018



134 In Year Applications in January 2018

100% of In Year Apps Processed within timeline.
31 on waiting list allocations.

Total School Admissions inbound interactions

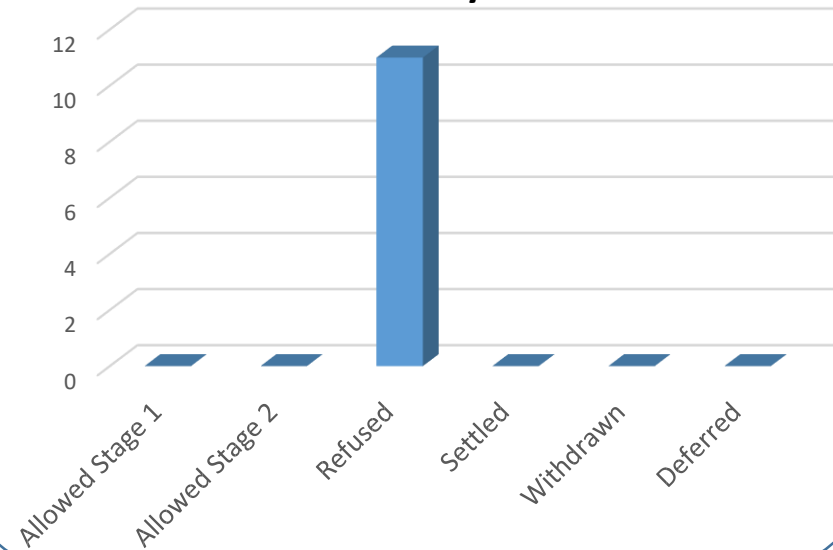


■ Inbound Calls ■ Inbound Emails ■ Inbound Webchats

1013 Total emails to School Admissions Team Inbox in February 2018



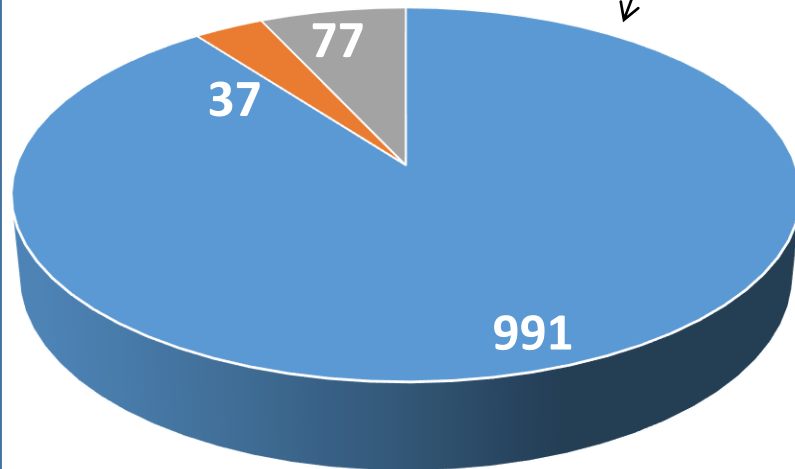
11 School Admissions Appeals in February 2018



94 In Year Applications in February 2018

100% of In Year Apps Processed within timeline.
31 on waiting list allocations.

Total School Admissions inbound interactions



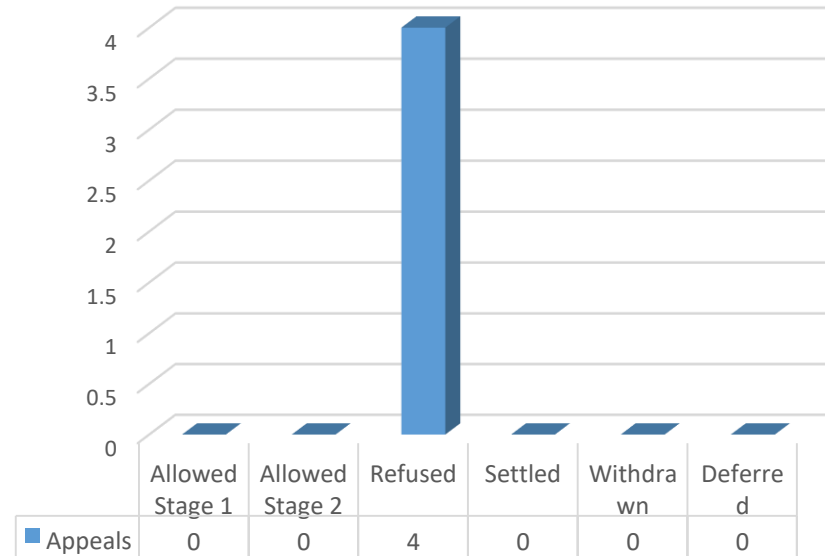
82% FTF for inbound calls to Customer Services

■ Inbound Calls ■ Inbound Emails ■ Inbound Webchats

2427 Total emails to School Admissions Team Inbox in March 2018



4 School Admissions Appeals in March 2018



100 In Year Applications in March 2018

100% of In Year Apps Processed within timeline.
22 on waiting list allocations.

This page is intentionally left blank

Agenda Item 75

Schools Forum Forward Plan 2018 /19

18	July	Revenue Monitoring
		Out-turn 1718 report
		De-delegated License charge
		High Needs Block
		Early years update
		Growth Fund projection and out-turn including request to carry forward the deficit 1718.
		Schools Admissions
		Update on Formula Changes 19-20 (Verbal)

17	October	Revenue Monitoring
		High Needs Block
		Draft Proforma SB for Submission to EFA
		Contingencies breakdown
		Final Settlement and variance EY & HNB
		Scheme for financing schools – maintained.
		Growth update & proposed budget 2019/20
		Update on Formula Changes

12	December	Revenue Monitoring
		Draft 2019/20 Budget
		Contingencies breakdown
		High Needs Block
		De-delegated items for 2019-209
		Centrally retained items including ESG
		Schools Block and Early Years Block
		Growth Fund

16	January	Revenue Monitoring
		Contingencies breakdown
		High Needs Block
		Proposed Schools Block Submission and the effect on schools. Include impact and modelling of SB, explanation of changes from Draft budget.
		Task and Finish group update. SB.
		Early years 19-20 budget

27	February	Revenue Monitoring
		Contingencies breakdown
		High Needs Block
		Consultation on the High needs block 19-20

27	March	Revenue Monitoring
		Contingencies breakdown
		19-20 combined Schools budget report.

15	May	Revenue Monitoring
		Contingencies breakdown
		High Needs Block
		Carried forward deficit on centrally retained to be funding 18-19 from the school
		Out-turn 2018-19
		Update of Scheme for financing schools