

# Dedicated Schools Grant and School Funding Reform 2013-14

Schools Forum

15<sup>th</sup> January 2013

**Author:** Head of Finance – Education and Innovation

**Parish / Wards Affected:** All

## Purpose

- To advise and seek Schools Forum Members' approval to the Local Authority's (LA's) proposals regarding a range of 2013/14 local formula and funding issues following the release of October 2012 Pupil Census data and the December 2012 Dedicated Schools Grant (DSG) announcement.
- To advise Schools Forum on the impact of the formula and pupil changes on individual settings including proposals on how to allocate funding released from the retained budget to enhance delegated school funding and minimise Minimum Funding Guarantee (MFG) costs in 2013/14.

## Recommendations

The Schools Forum is requested to:

- Note that the estimated value of the **2013/14 DSG** notional funding blocks is **£144,584,544** – Section 2 (Table 2)
- Note the values of **Pupil Premium** funding relating to 2013/14 (paragraph 2.6) which will generate funding of approximately £5.4m in respect of Swindon pupils
- **Centrally retained funding** – Section 2 note and agree 2013/14 proposals with regard to;
  - Central Items - **£516,700** (Table 3)
  - Central Schools Items – pupil growth **£577,600** (Table 4)
  - De-delegation items - **£33,300** or £11,000 (Table 5)
  - High Needs items - **£6,267,900** (Table 6)
  - Corporate overheads - a reduction of £200,000 to **£553,100** (excluding Education Other Than At school (EOTAS) - paragraphs 3.9 to 3.10)
- **Early Years funding** (Section 4)
  - Disadvantaged 2 year olds
    - Note and agree that the 2013/14 budget for disadvantaged 2 year olds' is set at the value of the funding allocated - **£1,987,000** (Table 7)
    - Support the LA retaining £55,000 of this sum in 2013/14 to support capacity building and increased take up – subject to annual review (paragraph 4.7).
    - Note that a proposed funding rate for disadvantaged 2 year olds will be presented to the 5<sup>th</sup> March 2013 Schools Forum after regional discussions
  - 3 and 4 Year Olds
    - Note and agree the 2013/14 funding rates for 3 and 4 year old nursery provision as shown at Table 9
    - Note and agree the 2013/14 budget for 3 and 4 year old nursery provision at **£7,300,000** as shown at Table 10
- **High Need Pupils - Special Schools** (Section 5)
  - Agree the planned place numbers (Table 11)
  - Agree the provisional top up fees (Table 12)
  - Note the indicative impact of the new place plus funding on individual Special

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Schools (Table 13)

- Note that the indicative net cost of funding Special Schools in 2013/14 is estimated at **£10,217,337** (paragraph 5.6) - subject to final confirmation at the 5<sup>th</sup> March schools Forum.
- **High Need - Special Resource Provision** (Section 5)
  - Agree the planned place numbers (Table 14)
  - Agree the provisional top up fees (Table 15)
  - Note the indicative impact of the new place plus funding on individual Special Resource Provision settings (Table 16)
  - Note that the indicative net cost of funding Special Resource Provision in 2013/14 is estimated at **£4,034,947** (paragraph 5.12) - subject to final confirmation at the 5<sup>th</sup> March schools Forum.
- **High Need - Outreach and Support Services** (Section 5)
  - Agree the proposed 2013/14 delegated funding to relevant settings for Borough wide Special Education Needs (SEN) outreach and support services at a cost of **£1,108,000** (Table 17) including £50,000 to establish a new British Sign language (BSL) provision at Issambard school (Table 18)
- **High Need - Alternative Provision** (Section 5)
  - Agree the place numbers (Table 19)
  - Agree the provisional top up fees (paragraph 5.21)
  - Note the indicative impact of the new place plus funding on individual Alternative Provision settings which is provisionally estimated at **£1,626,000** (Table 20) – subject to final confirmation at the 5<sup>th</sup> March schools Forum
  - Note the basis of charging for permanent exclusions and agree that funding should be recovered for the following financial year if an exclusion takes place after the October Pupil Level Annual School Census (PLASC) date (paragraphs 5.27 to 5.31)
  - Note the basis of charging for non-excluded pupils (paragraphs 5.32 to 5.34).
  - Note the basis of funding for hospital education services and that costs and funding are estimated at **£191,000** (paragraphs 5.36 to 5.37)
- **High Need – New Post 16 Special Education Needs responsibilities** (Section 5)
  - Note that funding of **£432,000** has been provided within the DSG settlement and has been provisionally allocated as a new budget provision (paragraphs 5.38 to 5.39)
  - Note that proposed funding rates will be presented to the 5<sup>th</sup> March 2013 Schools Forum
- **Mainstream funding** (Section 6)
  - Note that funding of **£43,000** has been allocated for Newly Qualified Teachers which will be distributed across schools in 2013/14
  - Note the agreed formula factors and provisional funding rates (Table 21)
  - Note the indicative impact of formula changes on individual settings (Table 22 and Annex E)
  - Support a permanent increase (Proposal 1) in low prior attainment funding to £701.57 per pupil at a cost of £1.5m (funded from available DSG) and note the impact on individual settings (Table 23 and Annex G)
  - Support a temporary increase (Proposal 2) in Primary Basic Per Pupil

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Entitlement (BPPE) funding to £2,642.28 per pupil at a cost of £0.9m (funded from cumulative underspends on the retained budget and note the impact on individual settings (Table 24 and Annex H)

- Confirm that Minimum Funding Guarantee (MFG) costs are to be funded by capping gaining school budget increases by a % per pupil (paragraph 6.15)
- Note the LA's **conclusions** & concerns regarding the school funding reform changes (Section 7)

## 1. Background

- 1.1 At the last meeting of 9<sup>th</sup> October 2012, Schools Forum members were presented with a detailed report setting out the LA's proposals for 2013/14 relating to centrally retained, early years, mainstream and pre 16 high need funding. These proposals had been formulated to meet the requirements of the new Department for Education (DfE) School funding reforms and reflected feedback from various local consultation events at which information had been modelled to provide all schools with an indication of how they would be affected by the changes. At that meeting the Schools Forum agreed the structure of the local formula for 2013/14 (including indicative funding values) which was submitted to the Education Funding Agency to ensure proposals complied with the new DSG grant conditions and revised School Finance Regulations.
- 1.2 During December DfE provided the LA with October 2012 pupil census data (which is to be used as the basis for 2013/14 mainstream funding) and confirmed next year's DSG funding levels. This information, together with a review of the retained budget position and high need place requirements has enabled the LA to calculate firm 2013/14 funding allocations for all pre 16 Swindon settings subject to a number of proposals being supported at today's meeting. If LA proposals are supported this will enable the LA to issue firm indicative funding allocations to early years settings, mainstream schools, special schools and Special Resource Provisions over the next few days.
- 1.3 The position regarding new post 16 Special Education Needs funding responsibilities has not been fully assessed yet as the LA is still working through the detail in this area. There is therefore a potential risk in that responsibility for new costs may exceed new funding which would require reductions to pre 16 funding rates.
- 1.4 This report is structured as follows:
  - Section 2 – Estimated DSG Funding Available in 2013/14
  - Section 3 – Retained Budget Update
  - Section 4 – Early Years Budget Update
  - Section 5 – High Needs Budget Update
  - Section 6 – Mainstream Budget Update
  - Section 7 – Conclusions and Related Issues

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## 2. Estimated DSG Funding Available in 2013/14

- 2.1 Due to changes to the DfE grant system it is not possible to readily provide a like for like comparison of funding between 2012/13 and 2013/14 but Schools Forum are reminded that the current year's DSG funding was calculated as follows:

<b>Table 1 - Calculation of 2012/13 DSG Funding</b>		
	Budget March 2012 Schools Forum	Final Position July 2012 Schools Forum
<b><u>2012/13 DSG</u></b>		
School & AP census pupils	27,690	27,708
Early Years census pupils	2085	2144
	29,775	29,852
GUF Rate (All pupils)	£4,696.48	£4,696.48
Total DSG	£139,837,692	£140,199,321
add SEN post 16 Block grant	£600,000	£611,938
<b>Total Funding Available 2012/13</b>	<b>£140,437,692</b>	<b>£140,811,259</b>

- 2.2 As anticipated LA's received their 2013/14 indicative DSG funding blocks from the DfE on 19<sup>th</sup> December 2012 and the position for SBC is summarised in the table below.

<b>Table 2 – Calculation of Estimated DSG Funding 2013/14</b>		
<b>A) <u>Schools Block</u></b>		
School PLASC October 2012 (overstated see note 1)		28,012
GUF Rate (School pupils)		£4,102.23
TOTAL SCHOOLS BLOCK FUNDING		£114,911,667
<b>B) <u>Early Years Block</u></b>		
3 and 4 year old Nursery PLASC October 2012		2,014
GUF Rate (3 and 4 year old pupils)		£3,888.06
TOTAL EARLY YEARS BLOCK FUNDING		£7,830,553
<b>C) <u>High Needs Block</u></b>		
High Needs Block after baseline adjustments		£21,833,768
Less Post 16 SEN High Needs Block Adjustment		-£611,938
Post 16 - April to July		£208,000
Post 16 - Aug to March		£836,000
TOTAL HIGH NEEDS BLOCK FUNDING		£22,265,830
<b>D) <u>Additional Funding Allocations</u></b>		

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Disadvantaged 2 year olds (New)	
- Statutory places	£1,425,387
- Trajectory building	£559,569
Total DSG for 2 year olds	£1,984,956
add 90% 3 year old protection funding	£286,419
add new funding for NQTs	£42,772
TOTAL ADDITIONAL FUNDING	£2,314,147
<b>As per DfE Funding Settlement Announcement 19/12/12</b>	<b>£147,322,197</b>
<b>DSG Adjustments not yet included in settlement</b>	
1) Penhill pupil number recalculation - as notified to LA on 20th December 2012	-£2,461,338
2) less overstated Hospital School Grant Funding assumed by SBC	-£276,315
<b>Assumed DSG Settlement Assumed by SBC 04/01/13</b>	<b>£144,584,544</b>

2.3 Although the total annual grant value has increased from £140.8m in 2012/13 to £144.6m in 2013/14 no inflationary increases have been provided and the **additional funding of £3.8m** is made up as follows:

- 348 net increase in school pupils between January 2012 and October 2012 plus an estimated additional 30 pupils between October 2012 and January 2013 - **extra £1.6m**
- Funding for disadvantaged 2 year old nursery education (together with a new statutory duty) - **new £2.0m**
- Funding for additional post 16 high needs funding responsibilities - **new £0.4m**
- Reduction in early years funding to remove 50% of the extra grant we received to provide 90% take up – **loss of £0.3m**
- Other minor changes – **extra £0.1m**

2.4 The DfE have advised that further relatively minor adjustments will be made to the final 2013/14 grant value in respect of high needs pupil growth and to reflect changes in responsibilities for funding non maintained special schools. This will be confirmed at the 5<sup>th</sup> March 2013 Schools Forum. It is relevant to note that whilst the overall DSG is still ring-fenced for education purposes for children aged 2 -16, the individual DSG blocks are not ring fenced and LAs continue to be responsible for taking decisions on the use of DSG in consultation with their Schools Forum. Furthermore, in allocating funding across the new funding blocks, the DfE made a number of arbitrary adjustments between funding blocks and, as explained in the following sections, proposed spending is not in line with the DfE allocations.

2.5 Over the following sections 3 (Central Budgets), 4 (Early Years), 5 (High Needs) and 6 (Mainstream), commentaries are provided on the 2013/14

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budget positions reflecting the October 2012 census, formula changes and estimated demand which show how the LA is proposing to allocate the £144.6m available in 2013/14.

## Pupil Premium Funding

- 2.6 In addition to delegated budgets funded from the DSG maintained schools will also receive Pupil Premium funding via the LA and Academies will receive similar funding via the EFA. The value of disadvantaged pupil funding will be determined by the number of eligible pupils on the January 2013 PLASC. The value of Service Children funding will be based on the higher of January 2011, 2012 and 2013 PLASC. The value of Looked After children will continue to be based on LA statutory children services return data. DfE have announced increased rates for 2013/14 as follows:

Type of Funding	Current rates 2012/13	New rates 2013/14
Disadvantaged pupils – FSM ever 6 (Jan 2013)	£623	£900
Service Children – (Jan 2011 / Jan 2013)	£250	£300
Looked After Children	£623	£900

- 2.7 The funding for disadvantaged pupils is by far the biggest element and based on current eligibility the LA estimates that the total value of Pupil Premium funding payable to Swindon Schools and Academies next year will be approximately £5.4m- a 45% increase over the current year.

## **3. 2013/14 Centrally Retained Funding Proposals**

- 3.1 The majority of items to be included in the 2013/14 centrally retained budgets were agreed by the Forum in October. Where relevant updates are provided below in the new categories set by DfE.

### **Schools Block - Central Items**

- 3.2 Items which fall into the category of central items are as follows and proposed budgets are mostly unchanged apart from the equal pay:

<b><u>Table 3 – Central Items</u></b>				
Service	Amount 2012/13	Proposed 2013/14	Final 2013/14	Note
Co-ordination of Admissions	£200,300	£200,000	£194,700	Marginally Reduced
Schools Forum Administration	£2,000	£2,000	£2,000	Unchanged
Termination of employment costs	£100,000	£100,000	£100,000	Unchanged
Equal pay – 50% match funding	£224,000	£200,000	£160,000	See note 1
Licenses and subscriptions (New)			£60,000	See note 2
<b>Totals</b>	<b>£526,300</b>	<b>£502,000</b>	<b>£516,700</b>	

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## Note 1 – Equal pay

- 3.3 With regard to equal pay match funding Schools Forum members are reminded that where some schools have chosen to repay their liabilities in lump sums to reduce their loan commitments the LA has matched this to similarly reduce the future loan commitments against the retained DSG. It is possible that some schools may choose to make further such payments and it is difficult to assess what level of matching retained funding will be required next year. In addition there are still a number of unsettled claims outstanding.
- 3.4 Based on existing commitments the provision required next year is estimated at £130,000 but, to provide a contingency of £30,000 for early repayments and new claims arising, the LA is proposing to retain £160,000 in next year's budget which is a reduction of £40,000 to the October 2012 estimate.

## Note 2 – Licenses and subscriptions

- 3.5 On 19<sup>th</sup> December 2012 LAs were unexpectedly advised that licenses for Copyright Licensing Agency (CLA) and Music Publishers Association (MPA) would be managed centrally by DfE on behalf of all Schools and Academies. This will replace existing arrangements whereby local contracts are managed by LAs on behalf of all schools in their areas. Clarification is being sought on how this new arrangement will operate and in the meantime the LA is proposing to retain £60,000 which is based on the LA directly paying subscriptions on behalf of all Swindon schools and Academies. An update will be provided at the March 2013 Schools Forum meeting.

***Schools Forum is asked to note and support the final 2013/14 budgets for central items which total £516,700.***

## Schools Block Central Schools Items – Pupil Growth

- 3.6 Items which fall into the category of pupil growth have been reviewed by the LA and are as follows:

<b><u>Table 4 – Central Schools Items – Pupil Growth</u></b>				
Service	Amount 2012/13	Proposed 2013/14	Final 2013/14	Note
Set up costs - £11,500 per primary class	£370,000	£46,000	£34,500	1
Trigger Funding	£844,000	£528,000	£543,100	2
Croft school pre-opening start-up costs	£185,000	0	-	-
<b>Totals</b>	<b>£1,399,000</b>	<b>£574,000</b>	<b>£577,600</b>	

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## Note 1 – Primary Set up Costs

- A proposal regarding the funding of Haydonleigh set up costs from the current year retained budget is included elsewhere on today's agenda which enables the LA to reduce next year's budget to £34,500. This is made up as follows:
  - Even Swindon                      £11,500                      )
  - Orchid Vale                              £11,500                      )                      £34,500
  - Rodbourne Cheney                      £11,500                      )

## Note 2 – Primary Trigger Funding

- The LA has recalculated the estimated costs of trigger funding payments which will be payable during 2013/14 based on the estimated additional in year pupil numbers arising from planned additional classes at £543,100 which is close to the previous estimate.
- Values are based on the provisional primary Basic Per Pupil Entitlement (BPPE) rate of £2,589.88 plus a 3% proposed increase which is explained in section 6.
- A breakdown of the estimated trigger funding payments to individual settings is provided at Annex A although actual payments will be determined by the actual number of additional pupils in the expanded classes in October 2013.

***Schools Forum is asked to support the revised 2013/14 budgets for central schools items – pupil growth totalling £577,600.***

## De-delegation Items

- 3.7 Any funding allocated to services subject to de-delegation must be initially allocated (i.e. delegated) to all settings. Academies will receive their per pupil share of this funding (which they may then choose to use to buy back LA services) whereas maintained settings can collectively agree for their funding to be de-delegated back to the LA without the need for traded services arrangements. Items which fall into this category are as follows:

<u>Table 5 – De-delegation Items</u>				
Service	Amount 2012/13	Proposed 2013/14	Final 2013/14	Note
Free School Meals Eligibility Assessment – de-delegated at approximately £0.40 per pupil	£4,300 (net)	£10,800 (gross)	£11,000 (gross)	Full Academy buy back expected
Trade Union Duties release funding				
a) de-delegated at approximately £0.81 per pupil	£9,900 (net)		£22,300 (gross)	<u>Note 1</u> Limited Academy buy



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OR				back expected
b) £22,300 budget deleted		£0	£0	
Former Every Child Programme	£185,000	£0	£0	
Schools in Challenging Financial Circumstances	£322,000	£200,000	£0	<u>Note 2</u>
<b>Totals</b>	<b>£521,200</b>	<b>£210,800</b>	<b>£33,300 Or £11,000</b>	

## Note 1 – Trade Union Release Time

- Neither SAPH nor SASH supported the continuation of any central funding for release time at the consultation events which led to the LA proposing the withdrawal of this retained budget in 2013/14
- At the October 2012 Schools Forum meeting it was agreed to defer a decision on this matter until January 2013 to give the Unions an opportunity to discuss the benefits of current arrangements with the Headteacher Associations. The LA's HR Schools Adviser issued a letter to schools on 7<sup>th</sup> January setting out the implications of withdrawing central funding.
- If de-delegation is agreed this equates to funding of £0.79 per pupil which will be paid to Academies but will be retained by the LA for Maintained Settings. The funding relating to maintained settings (43% of pupils) is estimated at £9.503. If some Academies choose not to buy back into the Borough wide service (as is the case in the current year) the LA will lose up to 57% of funding and either participating schools will have to pay a higher charge to maintain the existing service or the level of release time will need to be reduced.

## Note 2 – Schools in Challenging Financial Circumstances

- The DfE is reluctant to see LA's allocate DSG for schools in challenging circumstances (SICC) and there is limited scope for this to continue from 2013/14 onwards.
- Schools Forum members will recall that initial modelling of the new mainstream formula indicated that our two smallest schools would be detrimentally affected by the requirement to introduce a single lump sum and there was a consensus of support for SICC to be used to provide assistance to Bishopstone and South Marston schools allowed by DfE.
- Losses of funding after MFG at these schools were originally estimated at £31,000 and £21,000 respectively but, although over the longer term these schools will gradually experience reduced funding, as explained at section 6, there is scope to provide higher levels of MFG protection in 2013/14 than the LA had originally estimated which negates the need for the LA to retain SICC funding next year.

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***Schools Forum is asked to agree the proposed 2013/14 budgets for de-delegation items totalling £33,300 (with funding of Trade union release time) or £11,000 (without funding of trade union release time).***

## **Centrally funded High Needs Block Items**

- 3.8 There are no specific consultation requirements relating to retained funding levels within the high needs block as the DfE are allowing LAs to retain local flexibility on the best use of this funding. SBC shared proposals at the recent consultation events and wishes to provide continued transparency to the Schools Forum on the full use of the DSG. Updated proposals for 2013/14 are as follows:

<b><u>Table 6 – High Needs Block Items</u></b>				
Service	Amount 2012/13	Proposed 2013/14	Final 2013/14	Notes
Saltway Portage Service	£148,000	£148,000	£149,100	
Education Support Services Monitoring	£10,000	£10,000	£10,000	
Statemented Pupils Equipment	£130,000	£130,000	£130,000	
Speech, Language and Occupational Therapy	£164,000	£100,000	£100,000	
Travellers Children Support	£77,000	£0	£0	
SEN Resource Allocation Panel	£1,369,000	£1,800,000	£1,768,100	1
The Oakfield Project	£46,000	£46,000	£46,000	
Tuition Service	£650,000	£770,000	£787,000	2
Out of Borough Placements	£2,868,000	£3,242,000	£3,277,700	3
Inter LA Recoupment	£182,000			
<b>Totals</b>	<b>£5,644,000</b>	<b>£6,246,000</b>	<b>£6,267,900</b>	

### **Note 1 – SENRAP**

- The LA has revised its estimate of retained funding that will be required in 2013/14 to meet SEN needs (other than in planned Special School, SRP and Out of Borough placements) and a commentary is provided below on the various elements of funding;
- **a) Early Years** – a budget of £80,000 has been earmarked to provide additional funding to enable early years settings to support SEN children in Foundation Stage 1. Some children need additional support in early year's settings to ensure that they are able to transition well into school and to reduce the risk of their needs escalating. Currently funding is allocated at £6.70 per hour and it is proposed to increase this to £8.00 per hour from April 2013.
- Up to £13,000 of the £80,000 above will be used to commission specialist services from the Nyland Behaviour Support Outreach Team whilst the remainder will be allocated directly to early years settings following applications to the SENRAP panel. Where a child meets specific criteria

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for additional funding this will be allocated to the provider over and above the value of free nursery entitlement.

- A working party is currently reviewing the criteria for additional funding and the referral process itself. Details will be reported to the 5<sup>th</sup> March Schools Forum meeting and will be issued to all early years settings prior to the start of 2013/14.
- b) Mainstream Top up Fees – a budget of £1,400,000 has been earmarked to meet estimated demand for those mainstream SEN pupils which cost above £10,000 per year.
- This is based on assuming demand is similar to the current year whereby funding above 15 hours is allocated for a total of approximately 390 pupils but that, as agreed by Schools Forum in October, this will be fully paid at £12 per hour (current central funding is at £8 per hour) .
- Detailed operational guidance will be issued shortly but the key requirement will be for Schools and Academies to submit requests for additional top up funding for their high needs pupils which;
  - Show that £10,000 per year is already being effectively spent on the individual pupil from the notional delegated SEN budget
  - Show what additional funding over £10,000 would be effectively spent on to meet the pupil's needs.
- c) Contingency for Additional SEN Pupils in mainstream settings – Funding of £100,000 has been earmarked for schools that may request an increase to their current additional funding for pupils at their school because the pupil's needs have changed and also for any pupils who may already be at the school, are under assessment for a Statement and may require additional resources, or may join the Borough in year. This also covers the resource needed to fund transition arrangements when placements have broken down or interim and/or alternative education packages that are needed for a limited period of time.
- d) Contingency for Additional SEN Pupils in Special Schools / SRPs – Funding of £188,100 has been earmarked to support additional placements or bespoke packages that are required for pupils when it is considered their needs would be best met in a Special School or Special Resource Provision but, currently places are not available due to provision being full. In exceptional circumstances, it may be necessary to negotiate additional placements for pupils at a Special School or a Special Resource provision, or to arrange for a flexible package of support for the pupil in a mainstream school because we do not have a place in a specialist setting in the Borough. For example, this may include pupils who are moving into the Borough from another LA, or who are currently under assessment in Key Stage 1 with a diagnosis of ASC and who would require specialist provision but this is not available.

## Note 2 – Tuition Service

- The Tuition Service budget increased from £500,000 (2011/12) to £650,000 (2012/13) and now includes £120,000 of placement fees which

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are commissioned by the Tuition Service but which have previously been included in the Out of Borough Budget. Detailed estimates have been prepared for 2013/14 which total £787,000 which is marginally above the October 2012 estimate of £770,000.

- Although this level of funding was agreed in October a concern was raised that this may be excessive and a summarised budget breakdown with a commentary explaining service provision, cost pressures and indicate costs per pupil is attached at Annex B.

## Note 3 – Out of Borough Independent & OLA School Placements

- The LA has revised its 2013/14 out of borough budget to £3,277,700 which reflects both known and anticipated placement costs and assumed price increases next year of 2%.
- A summary of the proposed budget is attached for information at Annex C – this includes pre and post 16 pupils placed in private, voluntary, independent and maintained special schools and includes a contingency provision of £345,000 for up to 5 additional new placements at average annual costs.
- This budget includes other LA maintained school placements which were previously dealt with via inter LA recoupment and as DfE have transferred high need place funding between LAs it is not possible to readily compare the 2013/14 budget with 2012/13.

***Schools Forum is asked to note and support the setting of a retained high needs 2013/14 budget of £6,267,900.***

## Corporate Overheads

- 3.9 As previously reported, over recent years the LA has been reducing the level of corporate overheads charged to DSG services, to reflect staffing and other spending reductions made as a result of Local Government funding cuts and to recognise reduced SBC spend arising from the transfer of services to Schools and Academies. This has eased pressure on the retained budget and a further reduction is planned in 2013/14 as follows:

- 2010/11      £1,426,000
- 2011/12      £1,220,000
- 2012/13      £860,000
- 2013/14      £660,000

- 3.10 The proposed £200,000 reduction in 2013/14 is subject to Swindon Borough Council (SBC) budget and Council tax setting but can be used for DSG planning purposes. The LA is required to allocate these overheads across retained services on the Section 251 budget statement and a total of £106,900 has provisionally been allocated to the EOTAS budget to enable the service to buy back LA support at current levels. As in previous years,

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the balance has been prorated across the new DSG categories as shown in the overall retained budget summary at Annex D.

***Schools Forum is asked to note and support the inclusion of £660,000 corporate overheads within the 2013/14 retained budget – a reduction of £200,000 over the current year. Of this sum £106,900 has been provisionally allocated to the EOTAS service leaving £553,100 to be allocated across retained budgets.***

## Overall Retained Budget Position 2013/14

- 3.10 The construction of the new DSG funding blocks will require the retained budget to be realigned and in order for Schools Forum members to track the overall changes a summary is provided at **Annex D** to this report.
- 3.11 Precise year on year comparisons are difficult but overall retained spend is planned to reduce next year from £19.012m to £16.889m – a net reduction of £2.123m which is £0.588m higher than the £1.535m estimated in the October 2012 Schools Forum report. Main changes since October are:
- Reduced early year 3 and 4 year old budget - £0.520m
  - Reduced Schools in Challenging Circumstances - £0.200m
  - Removal of Drove BME funding + £0.124m
  - Other changes + £0.008m
- Net reduction to retained budget since October estimates - £0.588m
- 3.12 Some of this funding is required to meet increased demand for places in Special Schools and Special Resource Provision (see section 5) but there is scope to permanently enhance delegated funding to mainstream schools which is explained at section 6.

## **4. Early Years Funding**

- 4.1 As previously announced by DfE and reported to the Schools Forum, all early year's funding including nursery education for disadvantaged 2 year olds is moving to the DSG from 2013/14. This reflects legislative changes which place a duty on LAs to secure early years provision for disadvantaged 2 year olds as well as all 3 and 4 year old children. Commentaries on each area of early year funding and proposed locally determined spending levels are provided below.

### Disadvantaged 2 Year Olds

- 4.2 In 2012/13 LAs received funding to provide discretionary nursery provision for disadvantaged 2 year olds (and various other services such as Children Centres) within their Early Intervention Grant (EIG) allocations. As the EIG

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was not ring fenced the level of funding allocated to individual services was locally determined as part of the General Fund budget setting process.

- 4.3 The current year budget of £428,100 was set to provide funding for 131 children to access up to 10 hours of provision at a cost of £4.85 per hour. In anticipation of the new government targets, which require take up to rise to 20%) in September 2013 and to 40% by September 2014, the LA has been taking steps to build capacity via a local "Grow2gether" initiative which offers match funding of up to £5,000 per setting where providers commit to extend capacity. This initiative was launched in September and so far has generated 220 additional places.
- 4.4 On 27<sup>th</sup> November DfE released details of legislative changes relating to early years. Free early education will become a statutory entitlement for eligible two year olds from 1<sup>st</sup> September 2013, with the LA having a duty to secure provision. Eligible children are those which are Looked After and those who meet free school meals eligibility criteria e.g. from families whose income is below £16,190 and their parents are in receipt of one of a range of benefits. DfE estimate that approximately 130,000 children (20% of the total in England) are eligible and funding for Swindon in 2013/14 is based on an estimate of 600 eligible children.
- 4.5 In October the LA reported that funding of approximately £1.6m would be required in 2013/14 to fund increased provision from September 2013 at a cost of £5.35 per hour which is in line with other South West Local Authorities. On 27<sup>th</sup> November 2012 DfE released funding allocations for this year which for SBC are as follows:

<b>Table 7 – Disadvantaged 2 year old Funding 2013/14</b>	
<b>Notional amount for statutory places</b> – to fund statutory places for our 20% most disadvantaged children from September 2013	£1,427,387
<b>Notional amount for trajectory building</b> – to create and fund non-statutory places in preparation for the September 2014 increased entitlement to 40% of our most disadvantaged children	£559,569
<b>Total disadvantaged 2 year old revenue funding</b>	<b>£1,986,956</b>

***Schools Forum is asked to support the setting of the 2013/14 2 year old disadvantaged budget at £1,987,000 – in line with the notional DfE funding allocation.***

- 4.6 With regard to the setting of hourly rates DfE guidance is that decisions are for LAs to take in consultation with their Schools Forums and that they are strongly encouraged to pass all available funding to providers to deliver two year old places. This means that LAs are discouraged (although not prohibited) from using any of the DSG to fund LA early years staffing costs

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despite the new statutory duty being imposed and continued reductions to Local Government funding being made and resulting job cuts.

- 4.7 The LA is concerned that the extra burden to effectively fulfil this new duty and to manage a £2m budget will be extremely challenging in the current financial climate and seeks Schools Forum support to the retention of £55,000 (2.8%) of the 2 year old funding in 2013/14 to ensure sufficient staffing resources can be allocated to this area. This includes development work with providers to create places, working with health visiting and children centre staff to identify vulnerable children to ensure increased take up of places. The LA acknowledges that the workload involved is uncertain and that the initial focus on capacity building may not be a recurring responsibility and seeks approval of funding for one year only subject to Schools Forum review next January.

***Schools Forum is asked to support the retention of £55,000 of disadvantaged 2 year old funding to contribute to early year staffing costs in 2013/14 – subject to annual review.***

- 4.8 The DfE state that they have allocated funding to LAs at an average rate of £5.09 per hour and that this compares favourably to the Day Care Trust Cost Survey 2012 which shows average hourly child care fees in England are £4.13 per hour for under twos and £3.95 per hour for children aged two and over. There are approximately 3,000 2 year olds in the Borough and to achieve a 20% take up this equates to 600 pupils. SBC would therefore appear to be funded at a lower rate as summarised below:
- Based on SBC's 2013/14 allocation of £1,427,387 if this is funded at £5.09 per hour this provides funding for 280,430 hours which equates to only 492 children accessing 15 hours per week for 38 weeks (570 hours per child).
  - Based on SBC being funded for 600 children accessing 570 hours per year the total number of hours would be 342,000. The 2013/14 allocation of £1,427,387 equates therefore to an hourly rate of only £4.17.
- 4.9 DfE require LAs to fund all places via a single early years funding formula and although they imply we should work with and consult providers they are stipulating that a simple flat hourly rate is introduced without any quality or other subsidies. Government expects LAs to fund places in all settings that are rated good or outstanding by Ofsted and that their aspiration is that only providers in these categories will be used in future. The only matter to determine is essentially therefore to model the impact for March 2013 of the hourly rate although we have flexibility to provide additional support for two year olds with additional education needs and special education needs from the High Needs DSG block. For 2013/14, given the significant amount of 2 year old trajectory funding available, any SEN supplements can be funded

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from this allocation and proposals will be included in the 5<sup>th</sup> March 2013 Schools Forum report.

- 4.10 The only matter to determine is essentially therefore the hourly rate for 2013/14 to ensure it is sustainable based on the 2012/13 DSG settlement. Early Years officers have been consulting with South West regional colleagues where a regional hourly rate of £5.35 was emerging although this was prior to the DSG funding announcement. The DfE are keen to see a high level of transparency and all LAs will be required to submit details of their 2013/14 early years funding rates as part of their Section 251 statutory returns which will be published.
- 4.11 The hourly rate must be set to ensure the LA can meet the September 2014 target of 1,100 places and further discussions with regional colleagues to assess take up and potential funding rates are scheduled to take place in February 2013. Part of the 2013/4 DSG settlement includes £559,569 for trajectory building which will enable the LA to start funding provision above 20% as a step towards achieving the 40% September 2014 target. Proposals for the basic 2 year old hourly rate will be presented at the 5<sup>th</sup> March 2013 Schools Forum.

***Schools Forum note that a 2013/14 hourly rate for disadvantaged 2 year old nursery education will be presented at the 5<sup>th</sup> March 2013 Schools Forum***

- 4.12 For Schools Forum general information, in addition to the DSG the LA has received a capital grant of £400,859 from a share of £100m which has been made available nationally. This is intended to support implementation of early education for 2 year olds and has been distributed to LAs using the same formula as the DSG. The funding is not however ring fenced and can be used for any capital purpose over any time period. It is understood that SBC's Cabinet is likely to agree in February to use this to fund the following schemes:

<b><u>Table 8 – 2 Year Old Related Capital Schemes</u></b>	Approximate Cost
Tick-Tock Early Years condition issues - mobile classroom replacement	£60,000 - £100,000
Grow 2gether dis-advantaged 2 year old Early Years provision – LA match funding of £5,000 for up to 25 providers willing and able to expand capacity by 20 places	£125,000

- 4.13 DfE have not confirmed how disadvantaged 2 year old funding will be distributed beyond 2013/14 but have indicated that this will be via a formula approach. As they have no direct data on the number of eligible two year olds in each LA they will have to use school census and population data as a proxy as has been the case in 2013/14. They see LAs as having a key role to



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raise awareness of the programme with parents and it is the government's strong intention to reward LAs who achieve high levels of take up by moving to participation funding from 2015/16 onwards. It is crucial therefore that funding rates agreed for 2013/14 are sustainable.

## Three and Four Year Olds

- 4.14 At the October 2012 Schools Forum meeting details of the proposed 3 and 4 year old nursery funding values were proposed and agreed subject to satisfactory feedback being received from the early year's consultation process and an affordable DSG settlement. Letters explaining the funding position and limited options available were sent to all settings on 15<sup>th</sup> October and no issues were raised. Proposed formula factors for 2013/14 are unchanged since the October 2012 Forum and are as follows:

<b>Table 9 – Proposed 2013/14 Early Years (3 and 4 year old) Funding Rates</b>			
Item	2012/13 Funding Rates	2013/14 Proposed Funding Rates	Commentary
Basic hourly rate			
• Standard per child	£3.75	£3.75	Provision over 38 weeks
• Enhanced per child	£3.91	£3.91	Provision over 48 weeks
Quality paid per setting	£500	£500	Where staff are qualified/ training
Deprivation paid per setting	£1,000	£0 to £5,000	Based on IDACI scores
Flexibility payment per setting	£250	£0	Removes as all settings are now delivering flexibility

***Schools Forum is asked to confirm the 2013/14 3 and 4 year old early years funding rates as show in table 9***

- 4.15 As expected, the additional early years funding allocated to LAs such as SBC where 3 year old take up is lower than 90% is reducing by 50% in 2013/14. In setting the early years DSG funding block, the DfE have included the final low take up allocation of £286,419 (Table 2) – this will cease in 2014/15. It is however important to recognise that unlike all other areas of DSG (where the annual amount of funding is determined by a single census) the 3 and 4 year old funding will be revised on a termly basis based on actual take up. Any cost changes should therefore be directly matched by funding changes and, unlike previous years, no contingency budget needs to be allocated for growth.
- 4.16 The current 2012/13 and proposed 2013/14 budgets for early years' provision for 3 and 4 year olds are summarised below:

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**Table 10 – Provisional 2013/14 Early Years Budget (3 and 4 year olds)**

Item	2012/13 Budget	2013/14 Proposed	Commentary
Basic hourly rate payments	£6,910,500	£7,169,000	Cost of current placements
Quality payment	£28,500	£61,000	Aligned to 2 year olds.
Deprivation payment	£18,000	£70,000	Increase with introduction of Income Deprivation Affecting Children Index (IDACI)
Flexibility payment	£10,000	£0	Enhancement removed
<b>Sub Total to meet demand</b>	<b>£6,967,000</b>	<b>£7,300,000</b>	
General contingency	£280,030		No contingency required in 2013/14
Contingency – funding up to 90% take up	£572,970		
<b>Total Budget</b>	<b>£7,820,000</b>	<b>£7,300,000</b>	

***Schools Forum is asked to support the setting of the 2013/14 3 and 4 year old budget at £7,300,000 – as shown in table 10.***

## 5. High Needs Funding Proposals

- 5.1 As previously reported the LA is required to introduce “place plus” funding for Special Schools, Special Resource Provisions and Alternative Provision settings and has consulted with relevant Schools and Academies. The latest position is summarised below.

### Special Schools

- 5.2 Following feedback from the 27<sup>th</sup> September 2012 ASSSH consultation event and an assessment of parental preferences the LA has revised its special school place numbers as follows:

**Table 11 - Current and Planned Special School Places**

Setting	2012/13 Funded Places		2013/14 Funded Places	
	Apr-12	Sep-12	Apr-13	Sep-13
St Lukes	68	68	68 (68)	68 (68)
Brimble Hill	70	70	67 (65)	65 (65)
The Chalet	45	48	48 (48)	55 (48)
Crowdy's Hill	128	128	128 (128)	128 (128)
Uplands	103	113	114 (113)	128 (126)
Nylands	36	36	32 (36)	36 (36)
<b>Total Special Schools</b>	<b>450</b>	<b>463</b>	<b>457 (458)</b>	<b>480 (471)</b>
<b>Full Year Equivalent</b>	<b>457.6</b>		<b>470.4</b>	

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- 5.3 The place numbers above include 46 post 16 placements at Uplands and represent the LA's best estimates, based on discussions with relevant settings, of likely demand during 2013/14 which in some cases are different to previous estimates. All planned places must be funded at £10,000 and where a setting takes additional pupils above the number of funded places the new regulations stipulate that the LA **may** provide part year place funding at £833 per month in addition to the relevant top up fee. Subject to affordability the LA intends to fully fund additional places unless, by mutual agreement with the setting, this is not necessary. Figures in brackets reflect the latest estimated places as presented at the 9<sup>th</sup> October Schools Forum.

***Schools Forum is asked to agree the proposed 2013/14 special school place numbers as show in table 11.***

- 5.4 The LA has attempted to set top up fees to maintain stability as far as possible but also to ensure additional funds are provided for planned expansion. The table below shows the proposed 2013/14 top up fees for pupils attending Swindon special schools which are unchanged since the October 2012 Forum meeting. A tentative regional agreement has been reached whereby LAs will, during 2013/14 subject to review, for their pupils continue to pay the top up fee determined by the host LA. Beyond 2013/14 it is likely that LAs will seek to negotiate their own top up fees directly with providers.

<b>Table 12 - Current and Proposed Special School Top Up Banding Values</b>				
Existing Values	Banding	Proposed 2013/14 Funding		
		Place	Top-Up	Total
N / A	Band 1 plus = 35% uplift re 1-2-1 bespoke support packages	£10,000	£20,183	£30,183
£27,244	Band 1 BESD	£10,000	£22,021	£32,021
£22,703	Band 1	£10,000	£14,950	£24,950
£24,518	Band 2 BESD	£10,000	£19,072	£29,072
£20,432	Band 2	£10,000	£13,455	£23,455
£16,346	Band 3 BESD	£10,000	£10,223	£20,223
£13,622	Band 3	£10,000	£5,875	£15,875
£12,259	Band 4 BESD	£10,000	£5,797	£15,797
£10,216	Band 4	£10,000	£2,467	£12,467
Therapy top ups have been included above to transfer existing central contributions a) Uplands @ 220 per pupil    b) Brimble Hill @ £220 per pupil				

***Schools Forum is asked to agree the proposed 2013/14 special school top up fees as shown in table 12.***

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- 5.5 The table below shows the indicative position for each setting based on the planned place numbers in table 11 and the top up values in table 12. Actual 2013/14 funding allocations will be based on the agreed place numbers (funding is fixed and paid monthly) and the actual band values relating to individual pupils attending each setting (which is variable but will be paid on a monthly basis). For existing pupils top up values are based on the recent moderation exercise and are fixed unless pupils are re-banded due to changing needs. For new pupils which the LA anticipates will enter Special Schools during the year, bandings and top up values have had to be estimated.

<b>Table 13 - Projected 2013/14 Special School Funding - Excluding Pupil Premium</b>					
2012/13 Funding	Setting	2013/14 Indicative Funding			
		Place @ £10,000	Top Up @ Band Values	PFI @ Actual Cost	Total Funding
£1,663,914	St Lukes	£680,000	£1,020,365		£1,700,365
£1,629,931	Brimble Hill	£658,333	£757,203	£96,470	£1,512,006
£892,289	The Chalet	£520,833	£489,701		£1,010,534
£2,287,121	Crowdy's Hill	£1,280,000	£1,046,238		£2,326,238
£2,485,489	Uplands	£1,221,667	£1,557,691	£167,909	£2,947,266
£892,893	Nylands	£343,333	£555,493		£898,826
<b>£9,851,637</b>	<b>Totals</b>	<b>£4,704,167</b>	<b>£5,426,691</b>	<b>£264,379</b>	<b>£10,395,237</b>
<b>Notes</b> 1) Top Up funding is based on the estimated places and assumed banding values 2) Top up funding includes 14 pupils from other LAs who will directly pay placement top ups fees of approximately £177,900 to the providers. 3) Uplands includes Post 16 places – with effect from August 2013 the place element will be directly funded by the EFA					

- 5.6 The projections above indicate that special school funding will need to be £10,395,237 next year although approximately £177,900 will be paid by other LAs or the Education Funding Agency (EFA) leaving the net cost to Swindon's DSG at £10,217,337. The LA was unable to reissue the post moderation indicative funding allocations to Special School Headteachers before Christmas and would wish to secure their confirmation before finalising the proposals. The indicative funding for Uplands is based on an assumption that the 46 post 16 placements will be funded at the same banding values as pre 16 (Table 12). This will need to be reviewed as part of an overall assessment of High Needs post 16 funding when the costs of all new responsibilities are quantified. Any issues relating to special school places and funding will therefore be reported to the 5<sup>th</sup> March 2013 Forum meeting.

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***Schools Forum is asked to agree the indicative 2013/14 funding allocations for special schools which is estimated to be £10,217,337 – subject to Headteacher feedback being reported to the March 2013 Schools Forum.***

## Special Resource Provision

- 5.7 Following feedback from the 27<sup>th</sup> September 2012 ASSSH consultation event and an assessment of parental preferences the LA has revised its SRP place numbers as follows:

<b>Table 14 - Current and Planned SRP Places</b>				
Setting	2012/13 Funded Places		2013/14 Funded Places	
	Apr-12	Sep-12	Apr-13	Sep-13
Redoaks - HI SL	12	13	13 (13)	13 (13)
Ridgeway - HI	6	6	4 (4)	4 (4)
Redoaks - LDD	6	6	6 (6)	6 (6)
New Ridgeway - ASD	0	0	0 (0)	4 (6)
Lydiard Academy - ASD	9	12	11 (12)	15 (15)
Ruskin Junior - ASD	6	9	10 (10)	9 (9)
Kingsdown - ASD	15	15	14 (15)	16 (15)
Robert Le Kyng - PD	10	10	8 (10)	10 (10)
Westlea - PD	10	10	9 (10)	10 (10)
Commonweal - PD	15	19	18 (19)	20 (20)
Eldene - CLD	8	9	9 (8)	8 (8)
Millbrook - CLD	8	8	9 (8)	8 (8)
Even Swindon - SSL	14	14	15 (15)	15 (15)
Commonweal - SPLD	24	29	29 (29)	29 (29)
Mountford Manor - BESD	6	6	6 (6)	6 (6)
<b>Total SRP Places</b>	<b>149</b>	<b>166</b>	<b>161 (165)</b>	<b>173 (174)</b>
<b>Full Year Equivalent</b>	<b>159.75</b>		<b>168.00</b>	

- 5.8 The place numbers above represent the LA's best estimates, based on discussions with relevant settings, of likely demand which can be met during 2013/14 which in some cases are different to previous estimates. As with special schools all planned places must be funded at £10,000 and where a setting takes additional pupils above the number of funded places the new regulations stipulate that the LA **may** provide part year place funding at £833 per month in addition to the relevant top up fee. Subject to affordability the LA intends to fully fund any additional places unless, by mutual agreement

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with the setting, this is not necessary. Figures in brackets reflect the estimated places presented at the 9<sup>th</sup> October Schools Forum.

***Schools Forum is asked to agree the proposed 2013/14 Special Resource Provision place numbers as show in table 14.***

- 5.9 The move to “Place Plus” has been more difficult for SRPs than for special schools as current levels of funding are based on historic assessments of the cost of provision. Furthermore SRP funding is currently based on the additional not full cost of provision as schools have retained Age Weighted Pupil Unit (AWPU) and other funding estimated at £2,850 per pupil. The move to place plus has, as an initial step, required the harmonisation of per pupil funding across similar settings. Further work will be undertaken during 2013 to produce a more simplified range of SRP top up fees which are more focussed on pupils needs regardless of the setting they attend.
- 5.10 For 2013/14, in line with DfE guidance, the LA has set top up fees to maintain stability but also to ensure additional funds are provided for planned expansion. The table below shows the proposed 2013/14 top up fees for pupils attending Swindon Special Resource Provision which are unchanged. A tentative regional agreement has been reached whereby LAs will, during 2013/14 subject to review, for their pupils continue to pay the top up fee determined by the host LA. Beyond 2013/14 it is likely that LAs will seek to negotiate their own top up fees directly with providers.

<b>Table 15 - Proposed SRP Top Up Banding Values 2013/14</b>				
Prime Need	Band	Place	Top Up	Total
Cognitive and Learning - General and Specific Learning Difficulties  <u>Settings</u> - Redoaks, Eldene & Millbrook	A plus	£10,000	£18,900	£28,900
	A	£10,000	£16,493	£26,493
	B plus	£10,000	£14,888	£24,888
	B	£10,000	£10,073	£20,073
	C plus	£10,000	£9,270	£19,270
	C	£10,000	£8,468	£18,468
	D plus	£10,000	£7,665	£17,665
	D	£10,000	£6,863	£16,863
Speech, language and Communication Difficulties  <u>Settings</u> - Even Swindon	A plus	£10,000	£10,450	£20,450
	A	£10,000	£9,580	£19,580
	B plus	£10,000	£9,000	£19,000
	B	£10,000	£8,130	£18,130
	C plus	£10,000	£7,550	£17,550
	C	£10,000	£7,260	£17,260
	D plus	£10,000	£6,970	£16,970
	D	£10,000	£6,680	£16,680

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Speech, language and Communication Difficulties  <u>Settings</u> – Commonweal	A plus	£10,000	£8,650	£18,650
	A	£10,000	£7,780	£17,780
	B plus	£10,000	£7,200	£17,200
	B	£10,000	£6,330	£16,330
	C plus	£10,000	£5,750	£15,750
	C	£10,000	£5,460	£15,460
	D plus	£10,000	£5,170	£15,170
	D	£10,000	£4,880	£14,880
Speech, language and Communication Difficulties with ASD (Primary)  <u>Settings</u> - Ruskin Junior	A plus	£10,000	£22,200	£32,200
	A	£10,000	£19,500	£29,500
	B plus	£10,000	£18,600	£28,600
	B	£10,000	£16,800	£26,800
	C plus	£10,000	£15,000	£25,000
	C	£10,000	£13,200	£23,200
	D plus	£10,000	£11,400	£21,400
	D	£10,000	£9,600	£19,600
Speech, language and Communication Difficulties with ASD (Secondary)  <u>Settings</u> - Lydiard Academy , Kingsdown & Ridgeway (New)	A plus	£10,000	£21,250	£31,250
	A	£10,000	£18,550	£28,550
	B plus	£10,000	£17,650	£27,650
	B	£10,000	£15,850	£25,850
	C plus	£10,000	£14,050	£24,050
	C	£10,000	£12,250	£22,250
	D plus	£10,000	£10,450	£20,450
	D	£10,000	£8,650	£18,650
Behavioural Emotional Social and Difficulties  <u>Settings</u> - Mountford Manor	A plus	£10,000	£12,950	£22,950
	A	£10,000	£11,435	£21,435
	B plus	£10,000	£10,425	£20,425
	B	£10,000	£9,415	£19,415
	C plus	£10,000	£8,910	£18,910
	C	£10,000	£7,900	£17,900
	D plus	£10,000	£6,890	£16,890
	D	£10,000	£5,880	£15,880
Physical Difficulties  <u>Settings</u> - Robert LeKyg & Westlea	A plus	£10,000	£12,850	£22,850
	A	£10,000	£11,350	£21,350
	B plus	£10,000	£9,850	£19,850
	B	£10,000	£7,850	£17,850
	C plus	£10,000	£7,350	£17,350
	C	£10,000	£6,850	£16,850
	D plus	£10,000	£6,350	£16,350
	D	£10,000	£5,850	£15,850



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Physical Difficulties <u>Settings</u> - Commonweal	A plus	£10,000	£13,250	£23,250
	A	£10,000	£11,750	£21,750
	B plus	£10,000	£10,250	£20,250
	B	£10,000	£8,250	£18,250
	C plus	£10,000	£7,750	£17,750
	C	£10,000	£7,250	£17,250
	D plus	£10,000	£6,750	£16,750
	D	£10,000	£6,250	£16,250
Sensory Difficulties with British Sign Language <u>Settings</u> - Redoaks	A plus	£10,000	£31,450	£41,450
	A	£10,000	£27,160	£37,160
	B plus	£10,000	£22,870	£32,870
	B	£10,000	£20,010	£30,010
	C plus	£10,000	£17,150	£27,150
	C	£10,000	£16,864	£26,864
	D plus	£10,000	£11,430	£21,430
	D	£10,000	£8,570	£18,570
Sensory Difficulties without British Sign Language <u>Settings</u> - Ridgeway	A plus	£10,000	£9,580	£19,580
	A	£10,000	£8,570	£18,570
	B plus	£10,000	£7,560	£17,560
	B	£10,000	£6,888	£16,888
	C plus	£10,000	£6,215	£16,215
	C	£10,000	£6,148	£16,148
	D plus	£10,000	£4,869	£14,869
	D	£10,000	£4,196	£14,196
<b>Notes</b> 1) "Plus premiums" are payable to meet exceptionally high provision costs arising where; - Provision requires British Sign Language - Pupils have high levels of physical difficulties which require constant 1-2-1 personal care 2) Top up fees include the transfer of the following therapy top up fees which are currently centrally commissioned to provide educational assistance over and above PCT health related provision; - £1,800 Speech, language and Communication Difficulties - £1,350 Speech, language and Communication Difficulties with ASD – primary - £400 Speech, language and Communication Difficulties with ASD – secondary - £400 Physical Difficulties				

5.11 The table below shows the indicative position for each SRP setting based on the planned place numbers in table 14 and the top up values in table 15. Actual 2013/14 funding allocations will be based on the agreed place numbers (funding is fixed and paid monthly) and the actual band values relating to individual pupils attending each setting (which is variable but will be paid on a monthly basis).



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<b>Table 16 - Projected 2013/14 SRP Place Funding</b>				
2012/13 Funding	Setting	2013/14 Indicative Funding		
		Place @ £10,000	Top Up Values	Total Funding
£520,034	Redoaks - HI SL	£130,000	£408,850	£538,850
£105,174	Ridgeway - HI	£40,000	£34,280	£74,280
£169,357	Redoaks – LDD	£60,000	£96,638	£156,638
	Ridgeway – ASD	£23,333	£43,283	£66,617
£327,058	Lydiard Academy – ASD	£133,333	£228,626	£361,959
£246,333	Ruskin Junior - ASD	£94,167	£175,525	£269,692
£356,143	Kingsdown – ASD	£151,667	£272,117	£423,783
£240,963	Robert Le Kyng – PD	£91,667	£148,042	£239,708
£227,644	Westlea – PD	£95,833	£113,396	£209,229
£324,949	Commonweal – PD	£191,667	£206,208	£397,875
£178,621	Eldene – CLD	£84,167	£116,418	£200,585
£164,038	Millbrook – CLD	£84,167	£127,534	£211,701
£266,305	Even Swindon - SSL	£150,000	£140,800	£290,800
£414,200	Commonweal – SPLD	£290,000	£208,220	£498,220
£120,018	Mountford Manor - BESD	£60,000	£58,510	£118,510
<b>£3,660,837</b>	<b>Total SRP's</b>	<b>£1,680,000</b>	<b>£2,378,447</b>	<b>£4,058,447</b>

- 5.12 The projections above indicate that SRP funding will need to be £4,058,447 next year although approximately £23,500 will be paid by other LAs leaving the net cost to Swindon's DSG at £4,034,947. As with Special Schools, the LA was unable to reissue the post moderation indicative funding allocations to Headteachers before Christmas and would wish to secure their confirmation before finalising the proposals. Further work is required in respect of Mountford Manor as users of this service are currently charged. The EFA have advised that this facility should ideally be reclassified as an Alternative Provision setting but as an interim measure they have agreed that the LA can fund top ups directly so that direct charges to home schools can be waived. Any issues relating to Special Resource Provision places and funding will therefore be reported to the March 2013 Forum meeting.

***Schools Forum is asked to note the indicative 2013/14 funding allocations for Special Resource Provision which is estimated to be £4,034,947 - subject to Headteacher feedback being reported to the March 2013 Schools Forum***

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## Special Education Needs Outreach and Education Support Services

- 5.13 In addition to the requirement to fund high needs settings via the “place plus” methodology the LA can continue to commission Borough wide SEN outreach and Support Services and intends to do so in 2013/14. Set out below is a summary of current and proposed spending on these services which include a 5% uplift to recognise that where services transferred from the LA only funding for direct costs was provided. This increase will help these settings to absorb salary progression costs and proposed 2013/14 is as follows:

<b>Table 17 - Proposed 2013/14 Special Education Needs Outreach &amp; Support Services</b>			
Setting – Provision	2012/13	2013/14	Notes
Nylands - Primary Behaviour Support Team	£209,873	£220,400	
Uplands - Education Support Service	£214,416	£225,100	
Even Swindon - Speech and Language	£21,170	£22,200	
Ruskin Junior - ASD	£82,852	£87,000	
Ridgeway - Education Audiologist	£10,580	£11,100	
Redoaks HI Support Service	£214,684	£225,400	
Commonweal PD Support Service	£61,020	£64,100	
Millbrook SLD Support Service	£63,739	£66,900	
Ruskin Junior ASC Support Service	£57,943	£135,800	1
Issambard BSL Provision	£0	£50,000	2
<b>Totals</b>	<b>£936,277</b>	<b>£1,108,000</b>	
<b>Notes</b> 1) 2013/14 includes an additional £75,000 to expand the Ruskin ASC outreach service as proposed at the 9th October 2012 Schools Forum. See update at 5.14 below. 2) 2013/14 includes proposal to establish a British Sign Language (BSL) provision so that pupils currently at Redoaks Primary SRP can effectively transition to a secondary setting at Issambard – see paragraph 5.16 below			

### Ruskin ASC Outreach

- 5.14 As proposed at the October 2012 Forum meeting the Education Support Service for ASC based at Ruskin will be permanently extended to meet the growing need, particularly in Early Years and KS1. A 0.6fte teacher (TL2) will be appointed from April 2013; this post will be advertised early in January and will work in partnership with existing FS1/KS1 specialist provision. In addition, a 1.0 fte HTLA Senior Outreach Worker in Autism will also be appointed from April to offer support at all key stages. Interviews for this post will be held week beginning 7<sup>th</sup> January.

- 5.15 These posts will be used to provide additional intensive support for schools, mentoring packages for ASC/SCID, children at risk of exclusion and, where

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placements come under strain, respite for school and settings to enable long term sustainability of the placement. The additional resource also brings greater opportunity for the service to work in schools and alongside school based staff to support and nurture the development of sustainable ASC friendly environments.

## British Sign Language (BSL) Provision at Isambard

- 5.16 Red Oaks Primary school is the host school for a highly regarded and effective SRP for pupils who are deaf and use BSL as their key means of communication. The SRP has 13 pupils and it is anticipated that the first student will transfer to secondary education in September 2014. Red Oaks Primary and the LA are working together with Isambard to establish BSL within the school by 2014. Unless families feel confident that the provision at Isambard will meet the needs of their children they may seek out of borough provision, which would be at considerable expense to the DSG. The risk is that, if one family seek out of borough provision due to lack of confidence in a local offer, other families may follow.
- 5.17 The LA proposes therefore to support Isambard to be BSL ready for September 2014 and must take action now to convince parents the local offer is a strong alternative to out of borough provision. Support will be drawn from Red Oaks Primary school and the Advisory Teacher for the Deaf to build the capacity of the staff and students to develop a bilingual school with bilingual inclusion provision. It is acknowledged that the recruitment of staff with specialist skills is a real challenge and, whilst still seeking to recruit specialist expertise, the strategy is as far as possible to train existing staff and build expertise across the school.
- 5.18 Initial funding of £22,000 is required from April 2013 for Isambard to recruit and train a specialist Teaching Assistant to BSL level 2, and to train 10 existing members of staff to BSL level 1. From September 2013, a further £28,000 will be required for Isambard to recruit a Teacher for the Deaf who will work with staff, students and families to shape the provision at Isambard, to further build capacity so that they are ready to meet the needs of the local BSL community. Costings are summarised below:

<b>Table 18 – Costings for Isambard BSL Provision</b>		
Spending	2013/14 Funding	2014/15 Funding
Teaching Assistant from April 2013 to August 2014	£17,000	£7,100
Training	£5,000	£0
Teacher from September 2013 to August 2014	£28,000	£20,000
<b>Total annual Funding</b>	<b>£50,000</b>	<b>£27,100</b>

- 5.19 From September 2014 Isambard will be established as an SRP and will receive place plus funding for all high needs pupils which are placed with

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them. Part year funding for the two new posts estimated at £27,100 will need to be allocated to meet costs during the first term of 2014/15.

***Schools Forum is asked to support the funding of Special Education Needs Outreach and Support Services at a cost in 2013/4 of £1,108,000 (table 17) including £50,000 for a new provision at Isambard (table 18).***

## Alternative Provision – Pupil Referral Units

5.20 The LA has consulted with the Education Other Than At School (EOTAS) Management Committee and the White Horse Federation regarding Alternative Provision which (other than the hospital education service) must be funded via place plus at £8,000 per place plus locally determined top up fees. Place numbers have been agreed as follows:

<b>Table 19 - Current and Planned Alternative Provision Places</b>					
<b>Setting</b>	<b>2012/13 Funded Places</b>		<b>2013/14 Funded Places</b>		
	<b>Apr-12</b>	<b>Sep-12</b>	<b>Apr-13</b>	<b>Sep-13</b>	<b>FTE</b>
Stratton PRU	46	46	46	50	
Riverside	42	42	42	42	
Marlborough House CAMHS	12	12	12	12	
<b>Sub Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>104</b>	<b>102.33</b>
Nyland PRU	8	8	8	8	
Nyland CAMHS	8	8	8	8	
<b>Sub Total</b>	<b>16</b>	<b>16</b>	<b>16</b>	<b>16</b>	<b>16.0</b>
<b>Total AP Settings</b>	<b>116</b>	<b>116</b>	<b>116</b>	<b>120</b>	<b>118.33</b>

***Schools Forum is asked to agree the proposed 2013/14 alternative provision place numbers.***

5.21 For each of the above places DfE require place funding to be allocated at £8,000. In line with interim arrangements in most other LAs initial Top Up Fees are being implemented using standard averages for primary and secondary settings and SBC's initial proposals were calculated as follows:

- Primary AP pupils      £3,000
- Secondary AP pupils   £6,170

5.22 It is relevant to note that the above top up fee is based on covering the current **net costs** of operating the services after exclusion and other income from schools is accounted for. As explained in the following paragraphs the level of exclusions income is likely to increase next year and there is scope to

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locally agree a scheme which would increase the period over which funding can be recovered. Depending on Schools Forum's view on this the LA will need to recalculate exclusions income and potentially, top up fees.

***Schools Forum is asked to note the provisional 2013/14 Alternative Provision top up fees subject to final amendments to values being agreed at the March 2013 Schools Forum after a review of exclusions income.***

- 5.23 The impact on individual settings, based on the place numbers in table 19 and the provisional top up fees will impact on individual settings as follows:

<b>Table 20 - Projected 2013/14 Alternative Provision Funding</b>				
2012/13 Funding	Setting	2013/14 Indicative Funding		
		Place @ £8,000	Top Up @ Band Values @ £6,170 / £3,000	Total Funding
£1,427,404	Stratton PRU etc. – 102.3 places (excluding hospital service)	£818,640	£631,360	£1,450,000
£157,404	Nylands PRU etc. – 16 places	£128,000	£48,000	£176,000
£1,584,808	Totals for 118.33 places	£946,640	£679,360	£1,626,000

- 5.24 Additional funding for the Stratton PRU of £23,000 reflects the planned increase in places from September 2013. The additional funding at Nylands of £18,600 recognises that when the service transferred from the LA only funding for direct costs was passed over.
- 5.25 Work is on-going with the EOTAS Management Committee to set a 2013/14 net spending plan which is in line with the indicative delegated funding allocation above and a report will be presented to the Committee on 29<sup>th</sup> January 2013. In addition to needing to establish appropriate budgets to meet costs which have historically been provided by the LA (property maintenance, insurance, central support services) further work is required to estimate the levels of income that will be directly recovered from Schools and Academies for in year exclusions and for short term intervention services provided to minimise the risk of exclusions.
- 5.26 In addition to the difficulty of estimating the number of exclusions and demand for intervention provision (which must be charged to Schools and Academies at the relevant top up rate) there is a degree of local flexibility

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regarding the level of charging for permanent exclusions. This requires a decision to be taken by the Schools Forum as described below.

## Charging for Permanent Exclusions

- 5.27 Under the existing school finance regulations, where a pupil is permanently excluded, the LA is required to re-determine the excluding school's budget share based on the value of funding delegated for the pupil proportionate to the number of complete weeks remaining in the financial year. In the case of a KS4 pupil who would be leaving the school at the end of the Academic year, the funding recovered would be to 31<sup>st</sup> August. This income is allocated to the EOTAS or Tuition Service thereby reducing the amount of DSG that has to be directly allocated to fund them. Effectively the more income that is recovered from excluding schools, the less DSG funding all schools have to forego to directly fund EOTAS and Tuition. In Swindon pro rata AWPU reductions take place for both formal permanent exclusions and "withdrawn permanent exclusions" which are local agreements between the LA, school and parents that a pupil must leave the school without the need for a formal permanent exclusion. This process is managed via the LA's Fair access Panel.
- 5.28 Where exclusions take place after 1<sup>st</sup> April, but before the following January PLASC date, the amount of funding recovered is for the current year only and is currently limited to the relevant AWPU value. Where exclusions take place after the January PLASC date, it has been established practice at SBC since 2004 for the LA to also recover the AWPU value for the following financial year as the excluding school will receive this funding in their delegated budget. This practise is both logical and reasonable as it ensures funding follows the pupil but is not prescribed in the regulations. The current arrangements are based on a local agreement with SASH, SAPH and ASSSH from 2004 regarding the development of five protocols that supported the management of pupils at risk of permanent exclusion. These protocols were overseen by the Swindon Admissions Forum and have been subsumed in to the Swindon Fair Access Protocol from 2009. Given the relatively short time between January PLASC and 31<sup>st</sup> March there have however only been a relatively low number of these cases in the past – 17 in 2009/10 out of 48 total cases, 11 in 2010/11 out of 36 total cases and 10 in 2011/12 out of 38 total cases.
- 5.29 From the start of 2013/14 the new finance regulations state that LAs must recover all applicable pupil based funding. For permanent exclusions which occur after 1<sup>st</sup> April the LA will therefore charge the excluding school or Academy all the pupil led funding that has been included in their delegated budget on a pro rata basis including, where applicable, the Pupil Premium. Charges must be calculated from the sixth school day following the permanent exclusion date through to 31<sup>st</sup> March unless the pupil is KS4 and

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due to leave secondary education at the end of the summer term. Subject to final values being confirmed the LA is intending to include the following funding factors in the calculations:

## Every Pupil

Basic Per Pupil Entitlement – KS1 and 2 (subject to change see section 6)	£2,589.88
Basic Per Pupil Entitlement – KS3	£3,659.60
Basic Per Pupil Entitlement – KS4	£4,464.71

## Eligible Pupils only

Low Prior Attainment (subject to change see section 6)	£359.58
English as an Additional Language Funding	£574.11
Deprivation Local formula (FSM ever 6)	£865.86
Local formula IDACI funding - Band 1	£434.00
Local formula IDACI funding - Band 5	£1,215.00
Pupil Premium Funding (FSM ever 6)	£900.00

**Statemented Pupils** – If a statemented pupil is also attracting high needs top up funding from the centrally retained SENRAP budget to meet agreed costs above £10,000 this will cease to be paid to the excluding school and will also transfer to EOTAS.

**Average per pupil funding** – As it will not be possible to identify whether individual pupils are eligible for the above funding the LA will, after delegated budgets have been finalised, calculate average pupil led funding for each school. These values will be used to calculate daily charges which will average approximately £17.50 for a primary pupil and £24.00 for a secondary pupil plus actual SENRAP top up funding if applicable.

5.30 From 2013/14 the funding deducted from excluding schools will therefore be approximately 30% higher than current AWPU levels for a primary pupil (£13.50 per day) and 20% higher than current AWPU levels for a secondary pupil (£20 per day).

5.31 As school funding is to be determined by the October rather than January PLASC from 2013/14 onwards there is an increased likelihood that exclusions will take place after the following years funding has been set. So far this year 8 such permanent/withdrawn permanent exclusions have occurred. The LA has received confirmation from the EFA that, if locally agreed, the SBC practice of recovering funding relating to the excluded pupil for the following year can also be recovered. The LA believes that this is appropriate for the following reasons:

- This follows the principle of funding following the pupil
- It avoids a school from receiving funding for a pupil it has excluded

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- It increases EOTAS' income thereby reducing the value of DSG allocated to the service when annual budgets are set.

***Schools Forum is asked to note the basis of charging for permanent exclusions and agree that funding should be recovered for the following financial year if exclusion takes place after the October PLASC date.***

## Charges for provision of services to non- excluded pupils.

- 5.32 At present the LA is required under the School Finance Regulations to recover 80% of the Age Weighted Pupil Unit (AWPU) funding from Schools and Academies in respect of short term placements although charges are pro rated for dual registered pupils .This is typically pupils attending Riverside, Hospital Education, Marlborough House and the Tuition Service and mostly relates to secondary age pupils with few primary exceptions e.g. where pupils attend the hospital.
- 5.33 From 2013/14 where a school or Academy places a pupil at EOTAS, Tuition Service or the Nylands PRU for a short term basis, they will pay the LA determined top up fee directly to the service. Based on the provisional top up rates of £3,000 (primary) and £6,170 (secondary) over 195 school days per year the daily fee payable in 2013/14 will be £15.38 (primary) and £31.64 (secondary). Charges will therefore be higher in 2013/14.
- 5.34 The DfE are recommending that top ups for short term placements should be calculated on a half termly rate and for part time placements on a daily rate.

***Schools Forum is asked to note the basis of charging for non - excluded pupils.***

- 5.35 Given that a 2013/14 EOTAS budget has yet to be set and that funding will need to be calculated in light of the options regarding charges for permanent exclusions, the LA may need to revise proposed top up fees accordingly.

***Schools Forum is asked to note the provisional 2013/14 funding allocations for Alternative Provision settings is estimated at £1,626,000 (table 20) subject to final amendments to top up values being agreed at the March 2013 Schools Forum.***

## Alternative Provision – Hospital Education

- 5.36 The DfE have decided to introduce a separate element of DSG aimed at providing LAs with an annual cash allocation which meets the costs of operating their hospital schools. For 2013/14 this has been based on individual LAs estimates of 2012/13 costs and funding of £191,000 has been included in our High Needs DSG block.



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- 5.37 The LA has yet to finalise the 2013/14 EOTAS budget but the direct costs of operating the hospital education service, which is primarily dedicated staffing is estimated to be in line with the grant value.

***Schools Forum is asked to note the basis by which DSG is allocated to meet the costs of hospital provision and that funding of £191,000 is being provided in 2013/14.***

## Post 16 Provision – New responsibilities

- 5.38 The LA has historically funded post 16 provision in Special Schools (Uplands) and in Out of Borough placements by using an element of DSG funding plus the notional SEN Block Grant. The 2013/14 budget proposals above already include these items but from next year the LA will also have to fund high needs post 16 provision in Further Education Colleges and Independent Specialist Providers. In addition new arrangements will be implemented whereby the EFA will, from August 2013 directly fund the £10,000 place funding in Special Schools.
- 5.39 The LA will therefore need to liaise with post 16 providers over the next few weeks to establish top up rates and details will be presented to the 5<sup>th</sup> March 2013 Schools Forum. In the meantime it is assumed that extra DSG funding of £432,000 included in our 2013/14 grant will be fully allocated to meet new costs.

***Schools Forum is asked to note that the LA is provisionally allocating £432,000 of DSG funding to cover new post 16 responsibilities in 2013/14 and that details of proposed funding rates will be presented to the 5<sup>th</sup> March 2013 Schools Forum.***

## **6. Mainstream Funding Proposals**

### Funding for Newly Qualified Teachers

- 6.1 Funding previously included within the local government grant settlement for Newly Qualified Teacher inductions has now been transferred to the DSG for delegation to all schools through the local formula to allow them to pay for the services of their preferred appropriate body. This transfer of funding follows the September 2012 change to induction regulations for Newly Qualified Teachers (NQTs) where teaching schools became eligible to monitor and quality assure NQT inductions. The allocation for Swindon is £43,000 which is the LA's pupil based share of the national allocation of £10.2m. This will be allocated per pupil via a minor increase to the 2013/14 BPPE rates.

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***Schools Forum is asked to note that £43,000 has been included in the 2013/14 DSG settlement in respect of Newly Qualified Teacher funding for distribution across schools.***

## New Formula Factors

6.2 As the Schools Forum has previously been advised the range of factors that can be used to allocate mainstream funding in the new formula are being intentionally constrained by the DfE to simplify allocation methods by reducing them from a maximum of 37 under the existing School Finance Regulations to 12. In recognition that the changes required will only apply to 2013/14 and 2014/15 pending introduction of a national school funding formula the LA established the following guiding principles which were supported by both SAPH and SASH:

- Methods of allocation for each factor would be harmonised across sectors
- Funding rates for each factor would also be harmonised across sectors (apart from Basic Per Pupil Entitlement (BPPE) rates)
- Existing sector funding totals would be maintained by increasing or decreasing BPPE values as necessary in each sector

6.3 Following consultations with SAPH and SASH on the above principles proposed funding factors and indicative values were reported and agreed at to the October 2012 Schools Forum as shown below:

<b>Table 21 – Proposed 2013/14 Mainstream Formula Factors</b>		
<b>Factor – per pupil unless otherwise stated</b>	<b>Primary £</b>	<b>Secondary £</b>
BPPE KS1-2	2,589.88	
BPPE KS3		3,659.60
BPPE KS4		4,464.71
Lump sum values - per school	106,700.00	106,700.00
EAL (1,2 & 3yrs) – includes £80 per pupil from the reallocation of £124,000 Drove BME project funding)	574.11	574.11
IDACI Band 1	434.00	434.00
IDACI Band 2	529.00	529.00
IDACI Band 3	608.00	608.00
IDACI Band 4	781.00	781.00
IDACI Band 5	955.00	955.00
IDACI Band 6	1,215.00	1,215.00
FSM Ever 6	865.86	865.86
Low Cost High Need SEN (lower prior attainment)	359.58	359.58
NNDR (Business Rates)	Actual cost	Actual Cost
PFI Affordability Gap funding	Actual cost	Actual Cost

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- 6.4 The LA presented its proposed 2013/14 local formula factors and indicative values to the EFA at the end of October as a result of which clarification was requested regarding two areas - pupil growth and PFI funding. This was subsequently provided and accepted and the structure of our new formula is therefore in line with the new School Finance Regulations. The LA will however need to re-submit by 22<sup>nd</sup> January 2013, four days later than previously announced, a final proforma reflecting the October 2012 census data and final 2013/14 factor values which are affected by the DSG settlement (section 2) and the scope to redistribute savings arising from reductions to the retained budget (section 3).
- 6.5 Based on the October 2012 pupil details and characteristics arising from the census and the provisional funding values in table 21, the LA has calculated that total funding allocations to mainstream schools in 2013/14 will total £108.161m. The October census reflected the continued trend of increasing primary pupils and reducing secondary pupils:

	January 2012 Pupils	October 2012 Pupils	Change
Primary	16,629	17,177	+ 548
Secondary	10,411	10,211	- 200
Total	27,040	27,388	+ 348

- 6.6 The impact across mainstream schools is summarised below and a school by school breakdown is attached at Annex E. It is important to recognise that previous modelling presented at Headteacher Consultation events and to the Schools Forum were based on October 2011 pupil data (as was stipulated by DfE) whereas the latest figures reflect pupil changes between January 2012 (the basis of 2012/13 funding) and October 2012 (the basis of 2013/14 funding).

<b>Table 22 - 2013/14 Proposed Mainstream Funding compared to 2012/13 Actual Funding</b>			
	Primary	Secondary	Total
2012/13 Total Delegated Funding - Jan 2012 PLASC & current formula	£59,052,870	£48,085,463	£107,138,333
2013/14 Proposed Delegated Funding - Oct 2012 PLASC & new formula	£60,820,933	£47,339,780	<b>£108,160,713</b>
Year on Year change	£1,768,063	-£745,683	£1,022,380
Number of Gaining Schools ( <i>Oct 2011 estimate</i> )	41 (31)	2 (4)	43 (35)
Number of Losing Schools ( <i>Oct 2011 estimate</i> )	20 (30)	8 (6)	28 (36)
Average Gain	£51,327	£44,019	
Average Loss	-£16,818	-£104,215	
Maximum Gain	£163,888	£63,102	
Maximum Loss	-£66,237	-£273,881	

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Total Formula & Pupil Increases - Gaining Schools	£2,104,427	£88,039	£2,192,466
Total Formula & Pupil losses - Losing Schools	-£336,364	-£833,722	-£1,170,086
Value of MFG Protection included above	£613,388	£36,803	£650,191
Topslice of gaining schools to fund MFG protection at <b>2.8%</b> reflected above	-£619,201	-£30,991	-£650,191

- 6.6 The MFG protection cost of £0.650m is in line with the October 2012 estimate of £0.585m and a number of schools will lose funding as a result of the formula changes and/or fewer pupils. The cost of MFG will need to be met by capping gaining schools increases at 2.8% per pupil. The table above and Annex E reflect MFG funding and the capping of gaining schools.

## Remaining Funding Available

- 6.7 In section 2 Forum Members were advised that the total DSG funding available in 2013/14 is estimated at **£144,584,544** and, subject to Forum members' support, proposed funding allocations so far are as follows:
- Central Items - **£516,700** (Table 3)
  - Central Schools Items – pupil growth **£577,600** (Table 4)
  - De-delegation items - **£33,300** or £11,000 (Table 5)
  - High Needs items - **£6,267,900** (Table 6)
  - Corporate overheads - **£553,100** (paragraphs 3.9 to 3.10)
  - Disadvantaged 2 year olds - **£1,987,000** (Table 7)
  - 3 and 4 year old nursery provision - **£7,300,000** (Table 10)
  - Special Schools - **£10,217,337** (paragraph 5.6).
  - Special Resource Provision - **£4,034,947** (paragraph 5.12).
  - SEN outreach and support services - **£1,108,000** (table 17)
  - Indicative Alternative Provision settings - **£1,626,000** (table 20)
  - Hospital education services - **£191,000** (paragraphs 5.36 to 5.37)
  - Post 16 New responsibility funding - **£432,000** (paragraphs 5.38 to 5.39)
  - Newly Qualified Teachers - **£43,000** (paragraph 6.1)
  - Mainstream settings - **£108,160,703** (table 22)
- 6.8 The above services are estimated to require funding totalling £143.0049m – leaving £1.536m for distribution. An overview to pressures on the services funded by the DSG is provided below which culminates in proposals to delegate a further £1.5m to mainstream settings.

## Early Years

- Disadvantaged 2 year old funding has been provided to cover the costs of achieving 20% take up throughout 2013/14 and it is highly unlikely that spending will reach this level in the early part of the year. Furthermore part year trajectory building funding has also been provided to increase take up to 40% of disadvantaged children

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- Although 3 and 4 year old funding is reducing next year the proposed budget will fund all existing demands and the levels of DSG will increase each term if take up increases
- There are therefore no obvious funding pressures in 2013/14 Early Years budgets.

## High Needs

- Additional funding has been earmarked to meet extra places in September 2013 in both Special Schools and Special Resource Provision and these settings will automatically receive higher funding if pupils with higher needs are placed with them. No High Needs setting is attracting MFG funding next year although some settings with fewer pupils will need to reduce spending to remain sustainable.
- Funding has also been increased for commissioned SEN Outreach and Support Services.
- Within the retained budget contingency provision has also been made for increased mainstream pupils, increased out of Borough placements and also for additional Special School / Special Resource Provision placements.
- There are therefore no obvious funding pressures in 2013/14 pre 16 High Needs Budgets although the full implications of post 16 have yet to be clarified

## Mainstream

- Additional funding has been allocated to reflect pupil growth between January 2012 and October 2012 and trigger funding will be made available for September 2013 planned expansions. Those schools with fewer pupils will however need to reduce spending to remain sustainable.
- The enforced formula changes have however caused funding reductions to a number of mainstream settings requiring MFG funding to be allocated of £650,000 which is being met by the capping of gains at 2.8%
- A number of mainstream settings are therefore facing challenging funding settlements in 2012/13.

- 6.9 Although the LA cannot provide funding to directly offset MFG costs any increases to mainstream funding will reduce the level of MFG payable. The LA is proposing therefore to increase the overall value of delegated school funding both on a recurring basis (from reductions to the 2013/14 retained budget (by using £1.5m of remaining DSG) and on a temporary basis (by using £0.9m of cumulative underspends on the retained budget - see separate report). Proposals on how this funding should be allocated are as follows;

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## **PROPOSAL 1 - Increase low prior attainment funding from £359.58 per eligible pupil by £341.99 to £701.57**

- This is proposed as a permanent increase at a cost of £1.5m and is based on the LA's concern that under the new arrangements, mainstream schools will be required to fund the first £10,000 of costs for each of their SEN pupils from their notional delegated SEN budget.
- Although this is not dissimilar to current arrangements whereby schools submit requests for the SENRAP panel for funding to meet costs of provision above 15 hours, the make up of the notional SEN budget is rather arbitrary. For 2013/14 the LA's calculation is that each school will have funding available to meet the first £10,000 of costs from the following factors:
  - BPPE funding
  - Lump sum funding
  - EAL funding
  - IDACI funding
  - FSM deprivation funding
  - Low prior attainment funding
- It is relevant to recognise that not all SEN pupils cost £10,000 per year to educate and also that not all SEN pupils attract deprivation and EAL funding. The LA would suggest that the majority of SEN pupils will attract low prior attainment funding and that a tangible increase to this factor will provide targeted proportionate support to schools to meet SEN costs up to £10,000.
- A regional benchmarking exercise showed that Swindon is considerably below the South West average with regard to Low Prior Attainment Funding (see Annex F).
- The allocation of £1.5m will provide an additional £341.99 in 2013/14 to each of the 4,387 mainstream pupils recognised as having low prior attainment in the October 2012 census

6.10 The addition of £1.5m will increase funding allocations to mainstream schools in 2013/14 from £108.161m to £109.661m. The impact across mainstream schools is summarised below and a school by school breakdown is attached at Annex G.

<b>Table 23 - 2013/14 Proposed Funding compared to 2012/13 Actual Funding with extra £1.5m prior attainment funding</b>			
	Primary	Secondary	Total
2012/13 Total Delegated Funding - Jan 2012 PLASC & current formula	£59,052,870	£48,085,463	£107,138,333
2013/14 Proposed Delegated Funding - Oct 2012 PLASC plus increased prior attainment	£61,960,581	£47,700,409	<b>£109,660,990</b>
Year on Year change	£2,907,711	-£385,054	£2,522,657

Further information on the subject of this report can be obtained from Steve Haley on 01793 465794 or Email [shaley@swindon.gov.uk](mailto:shaley@swindon.gov.uk) <sup>38</sup>

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Number of Gaining Schools	50	4	54
Number of Losing Schools	11	6	17
Average Gain	£60,791	£55,896	
Average Loss	-£11,985	-£101,440	
Maximum Gain	£186,729	£131,939	
Maximum Loss	-£57,209	-£273,881	
Total Formula and Pupil Increases - Gaining Schools	£3,039,550	£223,584	£3,263,134
Total Formula and Pupil losses - Losing Schools	-£131,839	-£608,638	-£740,477
Value of MFG Protection included above	£412,518	£10,930	£423,447
Topslice of gaining schools to fund MFG protection @ 7.9% reflected above	-£423,447	£0	-£423,447

- 6.11 After allocating the additional low prior attainment funding the MFG protection cost reduces from £0.650m to £0.423m and would require the capping of gaining schools at 7.9% per pupil. The table above and Annex G reflect the payment of MFG funding and the capping of gaining schools - the majority of MFG is payable to primary settings

***Schools Forum is asked to agree the proposed permanent increase to low prior attainment funding increasing the 2013/14 per pupil value to £701.57.***

**PROPOSAL 2 - Increase the primary BPPE rate from £2,589.88 by £52.40 to £2,642.28**

- This is proposed initially as a temporary increase at a cost of £0.9m funded by using 50% of the cumulative underspends on the retained budget (see separate report).
- This is based on the benchmarking of proposed primary sector BPPE funding which showed that Swindon is below the South West average whereas secondary BPPE rates are very much in line. (see Annex F)
- The addition of £0.9m will increase funding allocations to mainstream schools in 2013/14 from £109.661m to £110.561m. Funding to maintain this increase should be available in 2014/15 from the balance of cumulative underspends and proposals will be presented to the Schools Forum during 2013 after the LA has obtained updated regional comparison data
- The impact across mainstream schools is summarised below and a school by school breakdown is attached at Annex H.

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**Table 24 - 2013/14 Proposed Funding compared to 2012/13 Actual Funding with £1.5m increased prior attainment funding and £0.9m primary BPPE increase**

	Primary	Secondary	Total
2012/13 Total Delegated Funding - Jan 2012 PLASC & current formula	£59,052,870	£48,085,463	£107,138,333
2013/14 Proposed Delegated Funding - Oct 2012 PLASC plus increased prior attainment & increased primary BPPE funding	£62,860,656	£47,700,409	<b>£110,561,065</b>
Year on Year change	£3,807,786	-£385,054	£3,422,732
Number of Gaining Schools	56	4	60
Number of Losing Schools	5	6	11
Average Gain	£69,458	£55,896	
Average Loss	-£16,367	-£101,440	
Maximum Gain	£204,352	£131,939	
Maximum Loss	-£36,825	-£273,881	
Total Formula and Pupil Increases - Gaining Schools	£3,889,620	£223,584	£4,113,205
Total Formula and Pupil losses - Losing Schools	-£81,835	-£608,638	-£690,472
Value of MFG Protection included above	£279,997	£10,930	£290,927
Topslice of gaining schools to fund MFG protection @ 11.5% reflected above	-£290,927	£0	-£290,927

6.12 After allocating the additional low prior attainment funding and increasing primary BPPE funding the MFG protection cost reduces from £0.423m to £0.290m and would require the capping of gaining schools at 11.5% per pupil. The table above and Annex H reflect MFG funding and the capping of gaining schools - only 9 primary schools are due to receive funding increases above this level. Despite the allocation of additional funding 11 settings will still experience year on year funding reductions but this is mainly due to pupil reductions, particularly in secondary settings, which does not attract MFG protection.

***Schools Forum is asked to agree the proposed temporary increase to primary BPPE funding increasing the 2013/14 per pupil value to £2,642.28.***

## Options to Apply Capping

6.13 At the Headteacher consultation events and October Schools Forum meeting the LA presented two options which were available under the School Finance Regulations to cap gaining schools in order to fund the costs of MFG. These options are:



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- A) To reduce the overall cash increase in all gaining schools by a fixed % age - this was originally calculated at 51% and remains accurate
- B) To limit the % increase per pupil in all gaining schools – this was originally calculated at 1.3% but is now much higher.

6.14 At both consultation events option B was preferred and this was supported at the October Schools Forum meeting. Both before and after the Forum meeting the LA received letters from the Headteachers at Eldene primary school raising concerns that the LA had misled SAPH at the consultation event regarding the merits of the two capping options and that SASH had expressed a preference for option B because the gaining secondary schools all benefited from this. In responding to this letter the LA contacted regional colleagues to ascertain which approach to capping they were using and 85% are using option B. The LA maintains that option B is the most logical and fairest way of dealing with this matter and the copy of the letter sent to Eldene explains this and is attached at Annex J.

6.15 As shown in table 24 the additional funding allocated to mainstream schools has significantly reduced the cost of MFG thereby allowing gains per pupil to be at 11.5% compared to the October estimate of 1.3%. This should therefore be positively received by Eldene and those other schools who stand to gain significant per pupil funding increases arising from the formula changes. In the circumstances, the LA would however still wish Schools Forum to review which of the two capping options is preferred and to reiterate support for option B.

***Schools Forum is asked to agree that 2013/14 gains are capped by a % per pupil and not a % of the cash increase.***

## 7. Conclusions and LA Concerns

### Overall Financial Position 2013/14

- 7.1 Although the LA has yet to finalise its post 16 SEN funding arrangements the 2013/14 DSG settlement, together with reduced retained spending next year, would appear to provide a generally satisfactory 2013/14 funding position for pre 16 settings. Substantial funding is being provided for disadvantaged 2 year old children to access free nursery education and, although reduced due to a formula change, funding for 3 and 4 year olds will be provided to meet take up. Significant funding increases are being proposed for high needs settings next year, partly to recognise increased pupils.
- 7.2 The LA's approach to the mainstream funding changes required under the school funding reform programme, supported by the Schools Forum, has minimised turbulence to individual school budgets. Even though additional funding has been provided from the retained budget to enhance mainstream funding levels, it is acknowledged however that a number of Swindon

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settings will receive reductions next year due to funding redistributions and/or, in some cases, pupil reductions. As explained in section 6 the LA has formulated proposals to minimise MFG protection costs and allow significant increases to be allocated to gaining schools. Over the next few years further funding will transfer from the losing schools to the gaining schools as MFG costs reduce. This will be particularly challenging for some schools which will need to reduce their staffing levels and cost bases to remain sustainable. The sustainability of small schools remains uncertain although MFG is avoiding immediate funding reductions.

- 7.3 As previously reported the sustainability of all high needs setting will largely be determined by their popularity and occupancy as they will only receive a limited amount of guaranteed “place” funding. The cessation of inter LA recoupment also passes an administrative responsibility to all schools with high needs pupils which will need to maintain detailed records to ensure top up funding is collected from Local Authorities.
- 7.4 Due to the late issue of information and guidance the LA has so far focussed on pre 16 funding issues but work has recently commenced to assess the implications of the transfer to DSG of post 16 High Need pupil funding. It is unfortunate that national guidance is not being issued leaving individual LAs to locally determine banding and top up values for high needs pupils.
- 7.5 Over recent years Swindon has had to subsidise post 16 placement costs at Uplands and Out of Borough providers from the DSG as annual costs have exceeded the value of the £0.6m notional SEN post 16 block grant. Initial 2013/14 estimates indicate that this position may be exacerbated as the costs of meeting new responsibilities (i.e. the top up fees payable to Further Education colleges and Independent Non Maintained Specialist providers) could exceed the value of extra funding included in the DSG. Further DSG is expected to be received in 2013/14 for growth in high needs places but there is a risk that final post 16 costs may result in a budget pressure. If necessary this may need to be temporarily funded from the balance of retained budget underspends which the LA expects to carry forward at the end of the current financial year. Further details on post 16 funding will therefore be reported to the March 2013 Schools Forum.
- 7.6 On a related matter the LA is pursuing guidance on how the Schools Forum should be constituted to best represent the view of FE colleges and ISP providers in discussion about budgets for Post 16 High Needs SEN going forward.

## 2014/15 Issues

- 7.7 Although the EFA have not raised any concerns with the LA regarding its new formula so far, despite the more prescriptive school finance regulations,

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there are still wide implementation differences even across the South West region and it is possible that further changes may be imposed by DfE in 2014/15. They will be using the LA January 2013 proformas to look for patterns and anomalies between 2012-13 and 2013-14 and, as opposed to a further consultation, are seeking to work with 11 LAs (including 4 F40 Authorities) between mid-January and mid- February to review the following questions:

1. Are we moving towards national consistency?
2. Are there any unintended consequences as a result of the changes we made in 2013-14?
3. What are the main issues for Local Authorities and providers in implementing the high need reforms?

7.8 A November 2012 presentation by DfE to the Association of Directors of Children Services included the following items which DfE are likely to explore as part of this review:

- **Primary to Secondary funding ratios** – this was considered by DfE in earlier consultation documents but subsequently deferred. LAs may therefore be required to set secondary funding at a level which is nationally determined to be a defined percentage above primary funding in 2014/15.
- **Pupil Led Thresholds** – DfE are striving for simplicity and a model which is essentially pupil led as reflected in the new School finance regulations which have only 2 mandatory factors (BPPE and deprivation) plus 10 other optional factors (including lump sums, EAL, SEN etc.) LAs may therefore be required to either reduce the number of optional factors or the value of funding that can be allocated via optional factors in 2014/15.
- **Prior Attainment** – DfE are aware that a replacement measure to the Early Years Foundation Stage Profile is required on which to base primary prior attainment funding.
- **Deprivation** – DfE are looking at whether deprivation funding should be targeted in a way which moves us towards each deprived pupil receiving the same amount. This implies that DfE may wish to cease the use of IDACI bandings and to allocate local deprivation funding along with the Pupil Premium using FSM data. This would have a very significant impact on those schools whose pupils are from deprived households but whose parents choose not to access free school meals.
- **Efficiency and Small Schools** – A number of LAs made representations to DfE about the cessation of small school protection models which resulted in the eventual softening of regulations in mid-December to allow a degree of continued funding for these schools over and above MFG protection. It remains to be seen however whether this will be sustainable in 2014/15 and thereafter when a national school funding formula is expected to be introduced. DfE are therefore reviewing the threat of

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closure of good, essential small schools in rural areas. In the meantime all small schools in Swindon are encouraged to explore all options to reduce their cost bases including possibilities to federate or amalgamate.

- 7.9 The LA's main concern regarding the school funding reform programme is still the continuing disparity in DSG funding levels across the country which has been exacerbated since the introduction of the Pupil Premium. The LA has, via the F40 consortium of low funded LAs, continued to lobby for an early resolution to this position and is pleased that four F40 LAs have been selected by DfE (North Yorkshire, Somerset, Staffordshire and Worcestershire) as case studies for their imminent review. Given the Chancellor's autumn statement, which signalled the continuation of austerity measures up to 2018, Schools Forum is advised that there is a stronger likelihood that other LA funding levels will reduce rather than Swindon and other F40 LAs funding increasing in the short to medium term.
- 7.10 The LA is disappointed at the level of core funding that will transfer to Academies under the terms of the new Education Services Grant which will provide the LA with £15 for all pupils in the Borough plus £132 for all pupils in maintained settings. The EFA will reduce SBC core funding by £132 per Academy pupil in 2013/14 although it is understood that funding at £150 per pupil will actually be provided to Academies. The LA and indeed LAs across the country feel strongly that the level of funding transferring to Academies is disproportionate. The loss of SBC core funding equates to £2.0m next year and contributes to an overall budget gap for the LA of £17.5m.

## Alternative Options

The LA is required to implement the changes detailed in this report from 2013/14 and any scope for local discretion has been highlighted throughout this and previous reports to the Schools Forum on the school funding reform programme.

### Risk Management

#### *Financial and Procurement Implications*

- These are set out through the report and in the Annexes attached.

#### *Legal / Human Rights Implications*

- There are no direct legal or human rights implications arising from this report.

#### *Links to Corporate Plans and Policies (in particular One Swindon Priorities)*

- Scheme for Financing Swindon Schools and the local fair funding formula.

#### *Diversity Impact Assessments*

- The DfE School funding reform is aimed at simplifying fair funding and although funding changes at individual settings are inevitable the DfE believes that the Minimum Funding Protection scheme will be sufficient.

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## Consultees

The Board Director – Finance, Revenues, Benefits and Property (Section 151 Officer) and Director of Law and Democratic Services (Monitoring Officer) are consulted in respect of all reports.

## Background Papers and Annexes

### Annexes to support the 2013/14 retained budget proposals:

Annex A – Estimated Trigger Funding

Annex B – Tuition Service Overview and Budget Statement

Annex C – Out of Borough, Independent and Other LA Placements

Annex D – Retained Budget Summary

### Annexes to support 2013/14 school funding proposals:

Annex E – Summary of 2013/14 mainstream funding

Annex F – Regional Benchmarking comparisons

Annex G – Summary of 2013/14 mainstream funding with increased low prior attainment funding

Annex H – Summary of 2013/14 mainstream funding with increased low prior attainment and increased primary BPPE funding

Annex J – Letter to Eldene Primary school regarding capping of gains