

# School Funding Reform

## Consultation on the School Funding Formula for Mainstream Schools in Bath and North East Somerset for 2018-19

**Closing Date : 13<sup>th</sup> November 2017**

# Contents

	Page
1. Introduction	3
2. Mainstream Schools Formula	4
3. Resources for High Needs	9
4. High Needs Targeted Support	11
5. De Delegation	13
6. Response	15

## List of Appendices

1.	Schedule of funding factors in the NFF and the B&NES local formula	page 16
2.	Comparison of funding increases under the NFF and B&NES local formula	page 18
3	Comparison of funding increases/decreases under the NFF and B&NES local formula with a top-slice for High Needs	page 21
4	Items De Delegated in 2017-18	page 24

## 1. Introduction

Following the Schools National Funding Formula (NFF) consultation at the start of 2017 and the snap General Election, the Education Secretary Justine Greening made an announcement on schools funding to Parliament on the 17 July 2017 followed by a further announcement on 14<sup>th</sup> September 2017. The Education and Skills Funding Agency (ESFA) have now issued their Operational Guidance on schools revenue funding for 2018-19.

### **Justine Greening's Statement to Parliament**

This statement did confirm £1.3 billion of additional funding for schools after significant lobbying to the NFF consultation from various groups including F40.

In summary the following were the key points to note from this Statement:

1. The basic entitlement for every pupil will increase in 2018-19 and 2019-20
2. There will be at least £4,800 allocated for every secondary school pupil; and £3,500 per pupil for every primary school. In 2018-19, as a step towards these minimum funding levels, secondary schools will attract at least £4,600 and primary schools £3,300
3. For the next 2 years the additional funding will provide for up to 3% gains a year per pupil for underfunded schools, and a 0.5% a year per pupil cash increase for every school
4. Protection of funding for pupils with additional needs
5. Local authorities will continue to set a local formula in 2018-19 and 2019-20
6. Some limited movements between the Dedicated Schools Grant (DSG) blocks will be permitted
7. Primary schools will receive increases to their PE and sports premium funding.

Every school will attract at least 0.5% more per pupil in 2018-19, and 1% more in 2019-20, than its baseline. This goes over and above the commitment that no school will lose funding as a result of the introduction of the National Funding Formula.

These commitments as part of the operational guidance have led to the Schools Forum to agree to consult on the introduction of a new formula for funding mainstream schools in B&NES.

This consultation will cover the

- A. formula used to fund all mainstream schools and academies in 2018-19
- B. consideration of utilising some resource to support pupils with High Needs
- C. mechanism used to support schools with high numbers of pupils with EHCP plans
- D. future of de –delegated funding that affects maintained schools

## Section 2

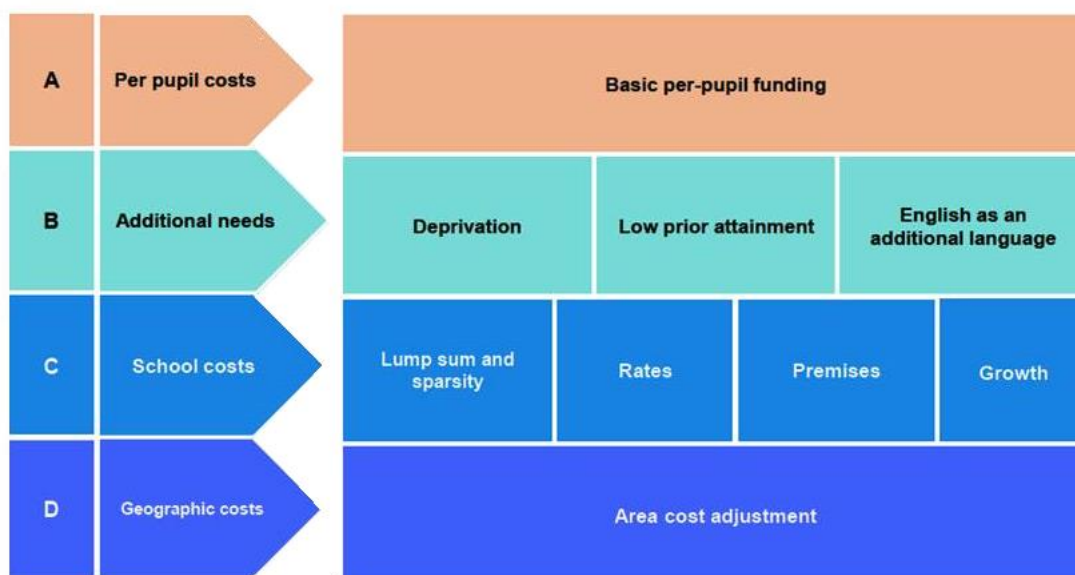
### Mainstream Funding Formula

#### Introduction

The DFE have set out their formula for the National Funding Formula (NFF) in their response to the consultation.

Their formula utilises the factors set out in their consultation document.

## Fairer funding – school formula factors



The DFE have published their planned factors and the funding values they intend to attach to these factors.

#### B&NES Local Formula

Since April 2013, the DFE have been restricting the funding factors that Local Authorities can use to fund schools to bring local formulae in line with the planned National Funding Formula. B&NES have been amending their formula over the past few years to bring the funding values in line with the government's direction.

This has resulted in the B&NES local formula being relatively similar to the proposed National Formula.

The main differences between the formulas lie in the use by the DFE of a few extra factors including the Free School Meals 6 ever, IDACI bands E and F, and Sparsity funding allocations.

Additionally, the funding values attached to each factor vary quite significantly. In particular, the funding allocated by B&NES to the higher bands of IDACI are much greater than those allocated by the DFE in the proposed NFF.

Appendix 1 shows the breakdown of the NFF and the B&NES Local Formula with the relative weighting that each factor has in the formula.

As part of the operational guidance, the DFE set out that LA's can still operate a Local Formula utilising the total funding pot allocated by the "soft" National Funding Formula. The DFE plan to allow this discretion for both financial years 2018-19 and 2019-20. .

The DFE require that LA's consult schools on their local formula as at least one change is required to ensure a minimum funding value is provided to every school.

Schools Forum discussed the issue at its meeting on 12<sup>th</sup> September 2017 and considered that a consultation was necessary.

### **Options available**

As the DFE have allowed Local Authorities discretion to operate a local formula, there is the opportunity to generate amendments to the formula. The Schools Forum has indicated that they would prefer to limit turbulence in the system enabling schools to plan financially with as limited complications as the regulations allow. The DFE have also set out their National Funding Formula with an approach that protects schools from significant increases or decreases with caps and floors being utilised to ensure stability.

This consultation will concentrate on 2 options:-

1. Implementing the National Funding Formula as set out by the DFE.
2. Utilising the additional funds allocated to B&NES through our Local Formula (with slight amendments to reflect required changes in DFE guidance).

### **Option 1. The National Funding Formula**

The DFE have set out their formula along the lines of the consultation exercise they completed in January 2017. The formula has factors and values that are set out in Appendix 1.

The link below provides the DFE guidance on the principles behind their formula

[National funding formula for schools and high needs - GOV.UK](#)

The new NFF is beneficial to B&NES Schools as the Schools Block is estimated to provide an additional 3.9% of additional funding in 2018-19 and a further 3.3% increase in 2019-20. The initial calculations provided by the DFE show that further increases are planned in future years however the exemplifications from the DFE do not show the exact increases merely indicating a further 1.6% would be available under the current funding totals.

As part of their creation of the NFF, the DFE have set out a principle that every school should see an increase of at least 0.5% per pupil in both the 2018-19 and 2019-20 financial years. In order to fund this, they have set a cap of 3.00% per pupil funding in both years.

The DFE have also set minimum funding values per pupil that will exist in each financial year. For 2018-19 the values are £4,600 for secondary schools and £3,300 for primary schools. In 2019-20 the values will be £4,800 and £3,500 respectively. This funding could (for some schools) take their increased funding over the 3.00% cap being applied.

Additionally, the DFE have changed the funding mechanism for Looked After Children adding resources to the pupil premium for LAC and reducing the funding passed through the schools funding formula. This shift means £32,707 is removed from the individual primary schools allocations and £60,004 is removed from the Secondary schools allocations.

## **Option 2**

### **The Local Funding formula**

The local formula in B&NES has followed the DFE guidance and has attempted to follow the planned direction of the National Funding Formula in order to minimise financial disruption when the NFF is implemented in full.

The factors utilised are similar to the NFF but have some significant differences in relation to the values attributed to some factors.

Appendix 1 shows the factors and values of both the NFF and the local formula.

If the local formula is continued to be used, the additional resources provided through NFF would be available for distribution using the local formula methodology.

The local formula has a Minimum Funding Guarantee process that allows a school to be protected to a 1.5% reduction per pupil. As the DFE's proposal is to ensure all schools receive at least 0.5% per pupil increase, the suggestion would be to utilise the new discretions allowed by the DFE and the MFG would no longer be applied. Meaning through our formula no school would see a reduction per pupil

The local formula also currently has a cap on gains that would need to be removed to allow the new funding to be distributed through the formula.

## **The Proposal**

As the timing of information provided by the DFE and the limited consultation time before submissions to the DFE have to be made, this consultation will need to concentrate on a limited set of options.

### **Option 1**

Adopt the National Funding Formula as set out by the DFE in their policy proposal. This option would fund schools using the factors and values set out in appendix 1.

### **Option 2**

Continue to use the Local Funding Formula, but adopt the following amendments to the mechanics of the caps and floors.

Amendment 1. To not utilise a cap on gains to allow the funds available to flow to the schools

Amendment 2. To restrict the Minimum Funding Guarantee to a 0% change to protect all schools from a possible reduction in funding. This will bring the local formula into line with the NFF (NFF protects all schools to 0.5% increase)

Amendment 3 To reflect the 0.5% increase in school funding set out by the DFE, by amending the baseline funding of each school by a 0.5% increase to ensure each school received the increase.

Amendment 4. To ensure that each primary school receives at least £3,300 per pupil (in line with the DFE announcement on school funding) and each secondary school receives at least £4,600 per pupil.

Amendment 5. To remove the funding of Looked After Children from the local formula in line with the national guidance. £32,707 primary and £60,004 secondary.

## **Considerations**

The movement of funding mechanisms over the past 5 years has been to move funding factors and values in line with DFE guidance. Whilst the DFE NFF mechanism is still adrift from the current local formula the additional resources being allocated to B&NES provides an ideal opportunity to make the final shift from the local formula to the NFF.

All schools will see an increase in the funding per pupil they receive for 2018-19 compared with the 2017-18 funding.

If the local formula is utilised in 2018-19 some schools will move further adrift from the NFF mechanism and will see a significant reduction in funding when the NFF is introduced in full.

Schools Forum is aware of these “cliff edges” and is keen to avoid the turbulence that this may bring.

### **Impact of the two Options**

In order for schools to understand the impact of the options, modelling of the estimated impact of both the NFF and the Local Formula is provided in appendix 2. Modelling of the impact of the NFF has been taken from the guidance provided by the DFE and the exemplifications they have produced. These exemplifications have been rounded to the nearest thousand pounds and therefore for comparison purposes we have modelled the Local Formula in the same way.

The modelling of the Local Formula has built the amendments described above into account but has utilised the pupil numbers and data used in the 2017-18 formula (the same as the NFF modelling)

In 2018-19 and future years the data and pupil numbers will be updated to reflect the most up to date information.

To ease understanding appendix 2 has a simple set of data showing the anticipated increases /decreases that schools can expect if the data and pupil numbers remained stable.

There are some schools where meaningful comparisons are not possible as the schools have recently opened and only a part year budget is available to compare. For these schools no data has been included in the comparison table.

### **Question 1**

**Would you prefer to adopt the option 1 or Option 2 ?**



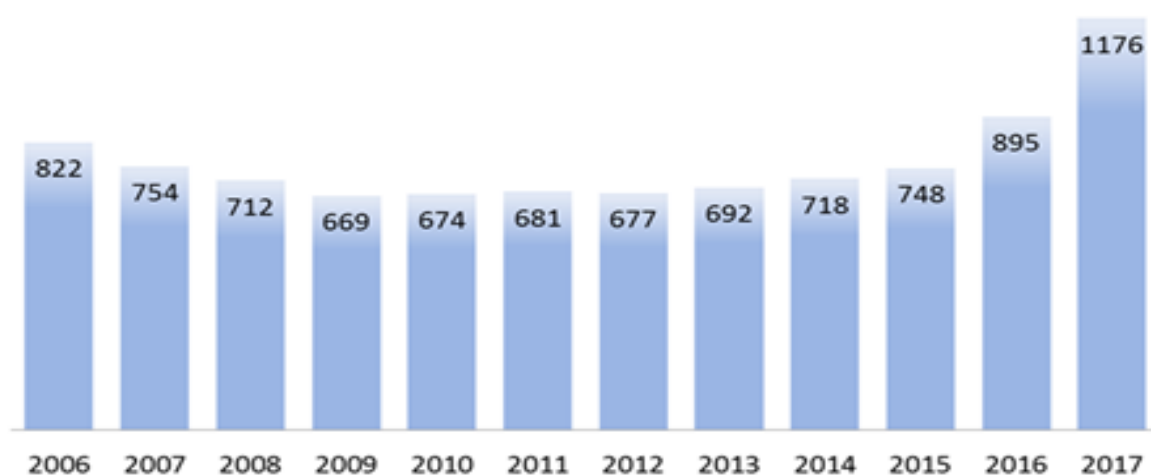
## Section 3

### High Needs Funding

The High Needs Budget has been under significant pressure for the past few years and resources have been utilised to support the individual payments to pupils with SEND from the overall resources made available for schools.

The number of Pupils with a EHCP plan has significantly grown over the last 3 years as illustrated below. This growth has created significant pressure on the High Needs budget and on school placements locally.

SEND Statement/EHCP numbers, B&NES, Snapshot at January 2006 to January 2017



With the introduction of the new Four Blocks of funding in the new National Funding Formula, in order to transfer resources between blocks, a consultation has to occur.

As part of the operational guidance the DFE set out that the Schools Forum can, after appropriate consultation, agree to transfer up to 0.5% of the schools block to another block to support pressures in that area.

The increase being observed in schools of 3.9% in 2018-19 and 3.3% in 2019-20 are not reflected in the increases being allocated to B&NES for High Needs. In 2018-19 and 2019-20 the High Needs Block is projected to increase by the minimum of 0.5%.

In order to limit the impact of this minimum funding level the request is that schools support a transfer of 0.5% of the schools block to the High Needs Block for financial year 2018-19. This resource will then support the funding allocated to schools as top up funding

The SEND service, together with head teachers, have been looking at creating a new banding mechanism for distributing high needs top up funding and this 0.5% funding will allow that group to ease the pressure on the bandings that have been generated by the rapid increasing SEND need. A further consultation on the SEN banding will occur later in the year

If schools Forum agree to transfer the 0.5% of funding from the Schools Block to the High Needs Block then the impact on individual schools can be seen in Appendix 3

**Question 2**

Do you agree that up to 0.5% of Schools Block funding can be transferred to the High Needs Block for 2018-19?

## Section 4

### High Needs Targeted Support

A High Needs Targeted Support allocation is made to schools that may have a greater than average number of pupils receiving a high needs top up in respect of a pupil's individual statement, EHCP or emergency fund. A budget of £546,000 is retained centrally by the LA within the high needs block and allocated to schools in addition to the formula funding for FY2017-18.

#### **Method of calculation for High Needs Targeted Support for FY2017-18**

In order to support schools that have a greater than average number of pupils who receive high needs top up funding in respect of a statement of SEN, EHCP or emergency funding as they attend a particular school, it is felt that the resources should be allocated on a 3 termly basis as follows

**May 2017** – 5/12ths x £6,000 per additional pupil above an original average calculated

**October 2017** – 4/12ths x £6,000 per additional pupil above an original average

**January 2018** – 3/12ths x £6,000 per additional pupil above an original average

This will provide resources to schools based on the actual numbers of pupils on roll who receive high needs top up funding in respect of a statement of SEN an EHCP or Emergency Funding.

The original average created is an annual exercise and is calculated using data in respect of the number of pupils on roll who receive high needs top ups in respect of a statement of SEN or an EHCP or Emergency Funding on the autumn census for the preceding year. This count excludes pupils funded for special unit placements, early year's transition funding, early year's nurture funding and medical funding.

The same data is collected in May, October and January and is compared to the average created from the autumn census to fund schools on a termly basis. *The calculation of the average in January 2017 using the October 2016 census data created a primary average where it is expected that 1 in every 58 pupils will receive top up funding in respect of a SEN statement or EHCP and a secondary average of 1 in every 73 pupils.*

This budget has overspent in recent years as the number of pupils with EHC plans has increased. In order to avoid future overspends we are looking to amend the methodology. Two options are being proposed.

#### **Option 1**

Amend the count process so that it is completed once per year.

The proposal would be to calculate the sector average as we do now using either the October or January census in the preceding financial year (January would be preferred option). This information would identify the schools that had higher than average numbers and £6,000 per child above the average is allocated..

Any amendments that occurred following the census count would not be included in the funding mechanism until the following financial year

Example.

Count taken on January census

Average calculated at 1:50 primary sector.

School with 200 pupils would expect to see 4 EHC plans

For 5 EHC plans the school would receive the £6,000 for the 1 child above the average.

Any new plans would not receive funding until the calculation was repeated the following financial year

## Option 2

The allocation could be scaled back to reflect the budget that has been retained by the LA. Currently the budget retained amounts to £546,000 and this could be split over the three terms based on the number of months within each term. Eg April to August -5 months, Sept to Dec - 4 months and January to March -3 months.

This resource available would be divided by the number of cases being supported in that term to establish the amount of payment to the school.

The modelled impact of this option would result in lower amounts allocated to schools. Based on the actual data from 2016-17 the impact on payments would have been as follows.

<b>Term</b>	<b>Current system</b>	<b>New System</b>	<b>Difference</b>
Summer	£2500	£2209	-£281
Autumn	£2000	£1857	-£143
Spring	£1500	£1138	-£362
Total	£6000	£5204	-£786

The actual impact in 2018-19 will depend on the number of EHC Plans that are recorded in schools census

With this model every school would know the threshold for an additional payment and would receive a contribution when a new pupil was registered at their school. The value of the contribution would reduce as the number of plans increase and vice versa.

### Question 3. Would you prefer Option 1 or Option 2?

## Section 5

### De Delegation of Funding for Maintained Schools (Maintained Schools Only)

As part of the schools funding regulations maintained schools can de delegate resources to the LA to support activity for the benefit of schools.

The DFE have indicated that this approach can continue until at least the 2020-21 financial year. This approach is possible irrespective of which formula is adopted by the Schools and Local Authority.

Appendix 4 shows the current items de delegated by schools forum in 2017-18

As schools convert to academy status the number of schools and the resources de delegated reduces. With the reduction, the ability of the funds and the administration of the process become less efficient and consideration of not de delegating the funds from maintained schools should be made. For each item of de delegation consideration whether collective purchasing is advantageous and whether alternative arrangements can be established to provide efficient purchasing processes.

Once De Delegation has been ceased for any item it will not be reversed in future years.

For each item the table below suggests the possible process that could exist if de delegation were to end.

<b>Description of De-delegated fund</b>	<b>Detail about what currently happens now in FY2017-18</b>	<b>What is the likely process required if de-delegation ceases from 1.4.18</b>	<b>Contact at the LA</b>
HCSS Budget Planning Software	Resources held to support the cost of the licence for budget management software	LA will continue to purchase the HCSS software licence for all schools at a discounted value and recharge schools via the monthly cash advance	<a href="mailto:wendy_jefferies@bathnes.gov.uk">wendy_jefferies@bathnes.gov.uk</a>
Pupil Retention Grant	Resources held to support Behaviour Management are currently allocated to area panels by the LA to support pupils with behaviour difficulties	The individual Behaviour Panel fund holders will calculate the contribution required and invoice schools. The LA will charge the Behaviour Panel fund holders for the Administrative Support provided to each panel by the LA	<a href="mailto:Debbie_Durnell@BATHNES.GOV.UK">Debbie_Durnell@BATHNES.GOV.UK</a>

Description of De-delegated fund	Detail about what currently happens now in FY2017-18	What is the likely process required if de-delegation ceases from 1.4.18	Contact at the LA
Behaviour Support Services	Resources held to support Behaviour Management are currently allocated to area panels by the LA to support pupils with behaviour difficulties	The individual Behaviour Panel fund holders will calculate the contribution required and invoice schools. The LA will charge the Behaviour Panel fund holders for the Administrative Support provided to the panel by the LA	<a href="mailto:Debbie_Durnell@BATHNES.GOV.UK">Debbie_Durnell@BATHNES.GOV.UK</a>
Broadband charges	Resources held to support the cost of Broadband circuits to schools	South West Grid will invoice schools directly for this service	<a href="mailto:Steve_Taylor@BATHNES.GOV.UK">Steve_Taylor@BATHNES.GOV.UK</a>
FSM Eligibility Checking Service	Resources held to support the cost of the B&NES Free School Meals Eligibility Checking Service	The LA will charge schools via the monthly cash advance for the service provided, if desired	<a href="mailto:wendy_jefferies@bathnes.gov.uk">wendy_jefferies@bathnes.gov.uk</a>
Maternity Cover	Resources held to cover the cost of maternity and paternity leave	Schools will be able to arrange insurance cover and it is suggested that schools take this cover immediately in order that a claim can be made for maternity from 1st April 2018	<a href="mailto:wendy_jefferies@bathnes.gov.uk">wendy_jefferies@bathnes.gov.uk</a>
Jury Magistrates & Councillors	Resources held to cover the cost of Jury, Magistrates and Councillor time	Schools can investigate if insurance cover is available to cover the cost for this activity otherwise the school budget will bear the cost	<a href="mailto:wendy_jefferies@bathnes.gov.uk">wendy_jefferies@bathnes.gov.uk</a>
Union Duties Lump per school	Resources held to support the cost of facility time for Union representatives	The LA will charge schools via the monthly cash advance for this service provided, if desired	<a href="mailto:Hester_Edmond@BATHNES.GOV.UK">Hester_Edmond@BATHNES.GOV.UK</a>
Suspended Staff	Resources held to cover the cost of individual agreed cases	Schools can investigate if insurance cover is available to cover the cost for this activity otherwise the school budget will bear the cost	<a href="mailto:wendy_jefferies@bathnes.gov.uk">wendy_jefferies@bathnes.gov.uk</a>

#### Question 4

For each service area do you wish de delegation to continue?

## Section 6

### How to respond

Responses to the consultation will be required by 13<sup>th</sup> November 2017 in order to process the responses in time to submit our proposal to the DFE by their deadline.

In order to ensure that schools understand the proposals a briefing session is being held on 31<sup>st</sup> October 2017, between 4.00pm to 6.00pm, at St Gregory's Catholic College, Combe Hay Lane, Bath BA2 8PA.

A response sheet has been attached to the consultation. The sheet will allow you to make comment on the proposals and in particular gauge views in relation to the de-delegation of some services. These views will be fed to the Cabinet Member for Childrens Services and the Schools Forum who will make the decisions on the specific elements of consultation.

Should you have a question about the proposals could you e-mail that to

[SchoolsStrategic\\_FinanceTeam@bathnes.gov.uk](mailto:SchoolsStrategic_FinanceTeam@bathnes.gov.uk)

Schools Strategic Finance Team

Where you query will be passed to the most appropriate individual

## Appendix 1

**Figure 3 - The Final National Funding Formula Funding Factors**

	Planned NFF funding values FY 2018-19		B&NES local factors FY 2017-18	
	Unit values (excluding ACA)	Percentage of total funding	Unit Values (includes ACA)	Percentage of total funding
<b>Basic per-pupil funding</b>		<b>72.9%</b>		<b>77.57%</b>
Age Weighted Pupil Unit (AWPU): Primary	£2,747	38.0%	£2,575	35.27%
Age Weighted Pupil Unit (AWPU): Secondary - KS3	£3,863	20.1%	£3,433	23.57%
Age Weighted Pupil Unit (AWPU): Secondary - KS4	£4,386	14.3%	£4,364	18.73%
Minimum per pupil funding level	NA	0.6%	NA	0.00%
<b>Additional needs funding</b>		<b>17.8%</b>		<b>11.80%</b>
<b>Deprivation</b>		<b>9.1%</b>		<b>7.05%</b>
Current FSM top up (Pupils currently claiming FSM at the last census): Primary	£440	0.9%	£1,658	2.06%
Current FSM top up (Pupils currently claiming FSM at the last census): Secondary	£440	0.5%	£2,006	1.73%
FSM6 (Any pupil that has ever claimed FSM in the past 6 years): Primary	£540	1.9%	£0	0.00%
FSM6 (Any pupil that has ever claimed FSM in the past 6 years): Secondary	£785	1.9%	£0	0.00%
IDACI band F: Primary	£200	0.3%	£0	0.00%
IDACI band F: Secondary	£290	0.2%	£0	0.00%
IDACI band E: Primary	£240	0.3%	£0	0.00%
IDACI band E: Secondary	£390	0.3%	£0	0.00%
IDACI band D: Primary	£360	0.4%	£480	0.20%
IDACI band D: Secondary	£515	0.3%	£569	0.00%
IDACI band C: Primary	£390	0.4%	£2,161	1.65%
IDACI band C: Secondary	£560	0.3%	£2,561	0.00%
IDACI band B: Primary	£420	0.5%	£2,161	1.28%
IDACI band B: Secondary	£600	0.4%	£2,561	0.00%
IDACI band A: Primary	£575	0.3%	£2,161	0.14%
IDACI band A: Secondary	£810	0.2%	£2,561	0.00%
<b>Low prior attainment</b>		<b>7.4%</b>		<b>4.23%</b>
Low prior attainment: Primary	£1,050	4.6%	£379	1.44%
Low prior attainment: Secondary	£1,550	2.8%	£1,390	2.78%
<b>English as an additional language</b>		<b>1.2%</b>		<b>0.39%</b>
English as an additional language: Primary	£515	0.9%	£1,010	0.28%
English as an additional language: Secondary	£1,385	0.3%	£2,020	0.11%
<b>Looked After Children</b>		<b>0.0%</b>	<b>£1,010</b>	<b>0.10%</b>
<b>Mobility</b>	<b>not identified</b>	<b>0.1%</b>	<b>£505</b>	<b>0.04%</b>
<b>School led funding</b>		<b>9.3%</b>		<b>10.62%</b>
<b>Lump sum</b>		<b>6.8%</b>		<b>9.68%</b>
Lump sum: Primary	£110,000	5.7%	£117,024	0.00%
Lump sum: Secondary	£110,000	1.1%	£117,024	0.00%
<b>Sparsity</b>		<b>0.1%</b>	<b>£0</b>	<b>0.00%</b>
Sparsity: Primary	£25,000	0.1%	£0	0.00%
Sparsity: Secondary	£65,000	0.0%	£0	0.00%
<b>Premises</b>		<b>1.8%</b>		<b>0.94%</b>
<b>Explicit Growth</b>		<b>0.5%</b>		<b>0.53%</b>



<p><b>Area Cost Adjustment:</b> <i>A multiplier that is applied to basic per pupil, additional needs and school led funding (ACA is already included in each of the factor subtotals)</i></p>		
	2.5%	0.00%
<b>Core Total (Excluding funding floor)</b>	100%	100.00%

## Appendix 2

Shows a comparison between the B&NES actual funding formula to B&NES Formula using DFE resources available and the DFE NFF. All modelling has been based on 2017-18 data

Shaded cells indicate new growing schools excluded from the calculations

*Figures calculated to the nearest £1,000*

DFE No.	School Name	FY2017-18 B&NES actual funding formula calculation	Estimated Gain Using Local Funding Formula	Estimated Gain Using The National Funding Formula	Local Formula Vs NFF
8009999	Abbot Alphege Academy	0	0	0	0
8002236	Bathampton Primary	704,000	15,000	17,000	-2,000
8003076	Batheaston C of E Primary	717,000	15,000	18,000	-3,000
8003077	Bathford C of E Primary	646,000	10,000	16,000	-6,000
8003420	Bathwick St Mary C of E Primary	729,000	15,000	19,000	-4,000
8002237	Bishop Sutton Primary	520,000	11,000	12,000	-1,000
8003078	Cameley C of E Primary	414,000	9,000	9,000	0
8003079	Camerton Church Primary	235,000	1,000	0	1,000
8002260	Castle Primary	1,004,000	19,000	26,000	-7,000
8002258	Chandag Infant	614,000	10,000	15,000	-5,000
8002242	Chandag Junior	864,000	20,000	32,000	-12,000
8002238	Chew Magna Primary	431,000	9,000	10,000	-1,000
8003440	Chew Stoke Church Primary	621,000	12,000	16,000	-4,000
8002239	Clutton Primary	448,000	10,000	11,000	-1,000
8003128	Combe Down C of E Primary	1,397,000	30,000	39,000	-9,000
8003086	East Harptree C of E Primary	360,000	8,000	10,000	-2,000
8003088	Farmborough C of E Primary	455,000	7,000	10,000	-3,000
8003089	Farrington Gurney C of E Primary	371,000	8,000	8,000	0
8003092	Freshford C of E Primary	534,000	11,000	13,000	-2,000
8003093	High Littleton C of E Primary	554,000	11,000	13,000	-2,000
8002293	Longvernal Primary	527,000	8,000	13,000	-5,000
8003096	Marksbury C of E Primary	401,000	6,000	1,000	5,000
8002259	Midsomer Norton Primary	1,023,000	19,000	31,000	-12,000
8002154	Moorlands Infant	646,000	10,000	16,000	-6,000
8002153	Moorlands Junior	829,000	17,000	21,000	-4,000
8003449	Newbridge Primary	1,440,000	29,000	56,000	-27,000
8002150	Oldfield Park Infant	653,000	11,000	17,000	-6,000
8002159	Oldfield Park Junior	902,000	19,000	24,000	-5,000
8002243	Paulton Infant	753,000	15,000	20,000	-5,000

<b>DFE No.</b>	<b>School Name</b>	<b>FY2017-18 B&amp;NES actual funding formula calculation</b>	<b>Estimated Gain Using Local Funding Formula</b>	<b>Estimated Gain Using The National Funding Formula</b>	<b>Local Formula Vs NFF</b>
8002270	Paulton Junior	898,000	17,000	23,000	-6,000
8002244	Peasedown St John Primary	1,560,000	100,000	84,000	16,000
8002246	Pensford Primary	334,000	2,000	6,000	-4,000
8002158	Roundhill Primary	1,320,000	28,000	6,000	22,000
8003102	Saltford C of E Primary	1,210,000	120,000	116,000	4,000
8003347	Shoscombe C of E Primary	419,000	6,000	9,000	-3,000
8009998	Somerdale Educate Together Primary	0	0	0	0
8003421	St. Andrew's C of E Primary	756,000	13,000	19,000	-6,000
8003094	St. John's C of E Primary (Keynsham)	776,000	16,000	20,000	-4,000
8003445	St. John's C of E Primary (Midsomer Norton)	1,264,000	102,000	107,000	-5,000
8003424	St. John's Catholic Primary (Bath)	1,084,000	19,000	29,000	-10,000
8003107	St. Julian's C of E Primary	404,000	6,000	9,000	-3,000
8003448	St. Keyna Primary	833,000	14,000	21,000	-7,000
8002001	St. Martin's Garden Primary	1,000,000	16,000	5,000	11,000
8003105	St. Mary's C of E Primary (Timsbury)	597,000	12,000	14,000	-2,000
8003109	St. Mary's C of E Primary (Writhlington)	522,000	3,000	12,000	-9,000
8003425	St. Mary's Catholic Primary	673,000	13,000	17,000	-4,000
8003035	St. Michael's C of E Junior	848,000	81,000	4,000	77,000
8003446	St. Nicholas' C of E Primary	854,000	14,000	26,000	-12,000
8003032	St. Philip's C of E Primary	966,000	18,000	26,000	-8,000
8003034	St. Saviour's C of E Infant	724,000	12,000	18,000	-6,000
8003033	St. Saviours C of E Junior	813,000	13,000	20,000	-7,000
8003422	St. Stephen's C of E Primary	1,224,000	129,000	132,000	-3,000
8002248	Stanton Drew Primary	277,000	6,000	5,000	1,000
8003103	Swainswick C of E Primary	321,000	4,000	2,000	2,000
8003447	Trinity Church	790,000	13,000	4,000	9,000
8002160	Twerton Infant	747,000	91,000	3,000	88,000
8003106	Ubley C of E Primary	342,000	4,000	7,000	-3,000
8002249	Welton Primary	641,000	11,000	16,000	-5,000
8002250	Westfield Primary	1,264,000	25,000	34,000	-9,000

DFE No.	School Name	FY2017-18 B&NES actual funding formula calculation	Estimated Gain Using Local Funding Formula	Estimated Gain Using The National Funding Formula	Local Formula Vs NFF
8003125	Weston All Saints C of E Primary	1,820,000	124,000	126,000	-2,000
8002251	Whitchurch Primary	777,000	39,000	19,000	20,000
8003423	Widcombe C of E Junior	788,000	15,000	21,000	-6,000
8002162	Widcombe Infant	639,000	11,000	16,000	-5,000
	<b>Total 63 Primary Schools</b>	<b>46,277,000</b>	<b>1,462,000</b>	<b>1,469,000</b>	<b>-7,000</b>
8004000	Bath Community Academy	1,786,000	32,000	8,000	24,000
8005400	Beechen Cliff	3,948,000	220,000	246,000	-26,000
8004001	Broadlands	2,300,000	83,000	60,000	23,000
8004130	Chew Valley	4,285,000	159,000	124,000	35,000
8004107	Hayesfield Technology College	4,181,000	128,000	150,000	-22,000
8004128	Norton Hill	5,530,000	454,000	416,000	38,000
8005401	Oldfield	4,413,000	196,000	213,000	-17,000
8004132	Ralph Allen	4,260,000	156,000	126,000	30,000
8004133	Somervale	1,976,000	32,000	56,000	-24,000
8004608	St. Gregory's Catholic College	3,589,000	128,000	133,000	-5,000
8004607	St. Mark's C.E.	1,278,000	22,000	6,000	16,000
8004002	The Bath Studio School	561,000	7,000	3,000	4,000
8004004	The IKB Studio School	490,000	6,000	2,000	4,000
8004003	The Mendip Studio School	519,000	19,000	12,000	7,000
8004138	Wellsway	4,616,000	393,000	423,000	-30,000
8004134	Writhlington	5,150,000	182,000	239,000	-57,000
	<b>Total 16 Secondary Schools</b>	<b>48,882,000</b>	<b>2,217,000</b>	<b>2,217,000</b>	<b>0</b>
	<b>Grand Total</b>	<b>95,159,000</b>	<b>3,679,000</b>	<b>3,686,000</b>	<b>-7,000</b>

**Notes:**

*The estimated gain under the LA formula contains amendments described in the consultation document. This includes no CAP on gains, a 0%*

*Minimum Funding Guarantee, and a per pupil guaranteed minimum of £3,300 per primary pupil and £4,600 per secondary pupil.*

*There has also been included an adjustment to allow at least a 0.5% increase per pupil for all schools as described by the DFE for comparison.*

Please remember these figures are for exemplification and have been calculated using 2017-18 data and pupil numbers. It is highly likely that they will change when the 2018-19 pupil numbers and data are utilised.

## Appendix 3 - Consultation 2017 SEN

### Resources adjustment

Shows a comparison between the B&NES actual funding formula to B&NES Formula using DFE resources available and the DFE NFF. All modelling has been based on 2017-18 data

Shaded cells indicate new growing schools excluded from the calculations

*Figures calculated to the nearest £1,000*

DFE No.	School Name	FY2017-18 B&NES actual funding formula calculation	Estimated Gain Using Local Funding Formula	Estimated Gain Using The National Funding Formula	Local Formula Vs NFF
8009999	Abbot Alphege Academy	0	0	0	0
8002236	Bathampton Primary	704,000	11,000	13,000	-2,000
8003076	Batheaston C of E Primary	717,000	11,000	14,000	-3,000
8003077	Bathford C of E Primary	646,000	7,000	13,000	-6,000
8003420	Bathwick St Mary C of E Primary	729,000	11,000	15,000	-4,000
8002237	Bishop Sutton Primary	520,000	8,000	9,000	-1,000
8003078	Cameley C of E Primary	414,000	7,000	7,000	0
8003079	Camerton Church Primary	235,000	0	0	0
8002260	Castle Primary	1,004,000	14,000	21,000	-7,000
8002258	Chandag Infant	614,000	7,000	12,000	-5,000
8002242	Chandag Junior	864,000	16,000	28,000	-12,000
8002238	Chew Magna Primary	431,000	7,000	8,000	-1,000
8003440	Chew Stoke Church Primary	621,000	9,000	13,000	-4,000
8002239	Clutton Primary	448,000	7,000	9,000	-1,000
8003128	Combe Down C of E Primary	1,397,000	23,000	32,000	-9,000
8003086	East Harptree C of E Primary	360,000	6,000	8,000	-2,000
8003088	Farmborough C of E Primary	455,000	5,000	8,000	-3,000
8003089	Farrington Gurney C of E Primary	371,000	6,000	6,000	0
8003092	Freshford C of E Primary	534,000	8,000	10,000	-2,000
8003093	High Littleton C of E Primary	554,000	9,000	10,000	-1,000
8002293	Longvernal Primary	527,000	5,000	10,000	-5,000
8003096	Marksbury C of E Primary	401,000	4,000	0	4,000
8002259	Midsomer Norton Primary	1,023,000	13,000	26,000	-12,000
8002154	Moorlands Infant	646,000	7,000	13,000	-5,000
8002153	Moorlands Junior	829,000	13,000	17,000	-4,000
8003449	Newbridge Primary	1,440,000	21,000	49,000	-27,000
8002150	Oldfield Park Infant	653,000	8,000	14,000	-6,000

DFE No.	School Name	FY2017-18 B&NES actual funding formula calculation	Estimated Gain Using Local Funding Formula	Estimated Gain Using The National Funding Formula	Local Formula Vs NFF
8002159	Oldfield Park Junior	902,000	14,000	19,000	-5,000
8002243	Paulton Infant	753,000	11,000	16,000	-5,000
8002270	Paulton Junior	898,000	12,000	18,000	-6,000
8002244	Peasedown St John Primary	1,560,000	92,000	76,000	16,000
8002246	Pensford Primary	334,000	0	4,000	-4,000
8002158	Roundhill Primary	1,320,000	22,000	0	22,000
8003102	Saltford C of E Primary	1,210,000	113,000	109,000	4,000
8003347	Shoscombe C of E Primary	419,000	4,000	7,000	-3,000
8009998	Somerdale Educate Together Primary	0	0	0	0
8003421	St. Andrew's C of E Primary	756,000	9,000	15,000	-6,000
8003094	St. John's C of E Primary (Keynsham)	776,000	12,000	16,000	-4,000
8003445	St. John's C of E Primary (Midsomer Norton)	1,264,000	95,000	100,000	-5,000
8003424	St. John's Catholic Primary (Bath)	1,084,000	14,000	23,000	-9,000
8003107	St. Julian's C of E Primary	404,000	4,000	7,000	-3,000
8003448	St. Keyna Primary	833,000	10,000	17,000	-7,000
8002001	St. Martin's Garden Primary	1,000,000	11,000	0	11,000
8003105	St. Mary's C of E Primary (Timsbury)	597,000	9,000	11,000	-2,000
8003109	St. Mary's C of E Primary (Writhlington)	522,000	0	9,000	-9,000
8003425	St. Mary's Catholic Primary	673,000	10,000	14,000	-4,000
8003035	St. Michael's C of E Junior	848,000	77,000	0	77,000
8003446	St. Nicholas' C of E Primary	854,000	10,000	22,000	-12,000
8003032	St. Philip's C of E Primary	966,000	13,000	21,000	-8,000
8003034	St. Saviour's C of E Infant	724,000	8,000	14,000	-6,000
8003033	St. Saviours C of E Junior	813,000	9,000	16,000	-7,000
8003422	St. Stephen's C of E Primary	1,224,000	122,000	125,000	-3,000
8002248	Stanton Drew Primary	277,000	5,000	4,000	1,000
8003103	Swainswick C of E Primary	321,000	3,000	0	2,000
8003447	Trinity Church	790,000	9,000	0	9,000
8002160	Twerton Infant	747,000	87,000	0	87,000
8003106	Ubley C of E Primary	342,000	3,000	5,000	-3,000
8002249	Welton Primary	641,000	7,000	13,000	-5,000
8002250	Westfield Primary	1,264,000	19,000	28,000	-9,000
8003125	Weston All Saints C of E Primary	1,820,000	114,000	116,000	-2,000
8002251	Whitchurch Primary	777,000	35,000	15,000	20,000

DFE No.	School Name	FY2017-18 B&NES actual funding formula calculation	Estimated Gain Using Local Funding Formula	Estimated Gain Using The National Funding Formula	Local Formula Vs NFF
8003423	Widcombe C of E Junior	788,000	11,000	17,000	-5,000
8002162	Widcombe Infant	639,000	7,000	13,000	-5,000
	<b>Total 63 Primary Schools</b>	<b>46,277,000</b>	<b>1,224,000</b>	<b>1,235,000</b>	<b>-6,000</b>
8004000	Bath Community Academy	1,786,000	22,000	0	22,000
8005400	Beechen Cliff	3,948,000	199,000	225,000	-26,000
8004001	Broadlands	2,300,000	71,000	48,000	23,000
8004130	Chew Valley	4,285,000	137,000	102,000	35,000
8004107	Hayesfield Technology College	4,181,000	106,000	128,000	-22,000
8004128	Norton Hill	5,530,000	424,000	386,000	38,000
8005401	Oldfield	4,413,000	173,000	190,000	-17,000
8004132	Ralph Allen	4,260,000	134,000	104,000	30,000
8004133	Somervale	1,976,000	22,000	46,000	-24,000
8004608	St. Gregory's Catholic College	3,589,000	110,000	114,000	-5,000
8004607	St. Mark's C.E.	1,278,000	15,000	0	15,000
8004002	The Bath Studio School	561,000	4,000	0	4,000
8004004	The IKB Studio School	490,000	3,000	0	3,000
8004003	The Mendip Studio School	519,000	16,000	9,000	7,000
8004138	Wellsway	4,616,000	368,000	398,000	-29,000
8004134	Writhlington	5,150,000	155,000	212,000	-57,000
	<b>Total 16 Secondary Schools</b>	<b>48,882,000</b>	<b>1,959,000</b>	<b>1,962,000</b>	<b>-3,000</b>
	<b>Grand Total</b>	<b>95,159,000</b>	<b>3,183,000</b>	<b>3,197,000</b>	<b>-9,000</b>

**Notes:**

***The estimated gain under the LA formula contains amendments described in the consultation document. This includes no CAP on gains, a 0% Minimum Funding***

***Guarantee, and a per pupil guaranteed minimum of £3,300 per primary pupil and £4,600 per secondary pupil.***

***There has also been included an adjustment to allow at least a 0.5% increase per pupil for all schools as described by the DFE for comparison and a removal of 0.5% funding in respect of SEN***

Please remember these figures are for exemplification and have been calculated using 2017-18 data and pupil numbers. It is highly likely that they will change when the 2018-19 pupil numbers and data are utilised.

#### Appendix 4 Current Delegation Amounts and Methodology

Description	Detail	Amount Primary	Amount Secondary	Methodology of delegation
HCSS	Licence for budget management software	£13,889	£969	Lump sum per school £323
Pupil Retention Grant – Primary Only	Resources to support behaviour management	£64,077	£0	Per pupil Primary £7.95
Behaviour Support Services	resources currently allocated to area panels to support pupils with behaviour difficulties	£290,782	£0	Per pupil Primary £36.04
Broadband charges	Costs of broadband circuits to schools	£193,446	£20,591	Lump sum £3,659 Per pupil Primary £4.48 Secondary £5.01
FSM checking Service	Resources to check eligibility of pupils to FSM	£10,559	£2,667	Per pupil Primary £1.31 Secondary £1.39
Maternity cover	Cost of cover maternity and paternity	£236,883	£31,912	Per pupil Primary £29.39 Secondary £16.63
Jury, magistrates and Councillor	Cost of cover	£2,418	£768	Per pupil Primary £0.30 Secondary £0.40
Union duties	Cost of facility time for union representatives	£32,465	£2,265	Per school Primary £755 Secondary £755
Termination of employment costs	Cost of individual cases	£7,818	£1,132	Per pupil Primary £0.97 Secondary £0.59