

Cheshire West & Chester Council

Cheshire West and Chester Schools Forum

Monday 12 December 2016
4.30pm – 6.30 pm

To be held at

Queen's Park High School
Queen's Park Road
Handbridge
Chester CH4 7AE

Refreshments will be available from 4pm

Schools Forum Clerk
Children and Families
Cheshire West and Chester Council
Telephone 01244 972901



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Cheshire West and Chester Schools Forum

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Agenda for Cheshire West and Chester Schools Forum 12 December 2016

1.	4.30	Introductions and apologies		
2.	4.35	Minutes and matters arising of last meeting 2.1 To agree the minutes of the meeting held on 19 September 2016 2.2 Matters arising		page 4 - 13
3.	4.50	Dedicated Schools Grant (DSG) 2016-2017 Forecast Outturn at Mid-Year Review	Paul Plested	page 14-15
4.	5.05	Falling rolls fund	Natalie Cole	to follow
5.	5.30	Changes in funding arrangements for Income Deprivation Affecting Children Index (IDACI) bands	Natalie Cole	page 16-25
6.	5.50	Initial Planning for DSG Allocations for 2017-2018 and Budget Setting	Natalie Cole	to follow subject to availability of DfE data
7.	6.10	Apprenticeship levy	Paul Plested	verbal
8.	6.20	Any other business		
9.	6.30 Finish	Next meeting: Monday 16 January 2017 Schools Forum and finance sub group meeting schedule and forward plan		page 26

**Cheshire West and Chester
Schools Forum
12 December 2016**

Agenda item 2

Draft minutes Cheshire West and Chester Schools Forum, Queen's Park High School, Chester, 19 September 2016

Present:

Paula Adolph

Hilary Berry

Cheryl Bullen

David Charlton (Chair)

Sarah Curtis

Kate Docherty

Steve Dool

Kathie Foye

John Freeman

Duncan Haworth

Mike Holland (sub for David Curry)

Luci Jones

Sarah Lee

John Murray

Samantha Myers-Whittaker

Sue Pearson

David Rowlands (sub for Martin Nield)

Ian Trotman

Jenny Turner

Katie Tyrie

Caroline Vile

Geoff Wright

Sue Yates

Representing:

PVI (Private, voluntary and independent) early years' providers

CWAPH (Cheshire West Association of Primary Head teachers)

Primary head teachers

Secondary head teachers

Primary head teachers

Primary head teachers

Academies

PVI early years' providers

Secondary governors

Primary governors

Secondary head teachers

Academies

Academies

Academies

Special head teachers

Primary governors

Primary governors

Primary governors

Secondary governors

Nursery head teachers

Diocese

Unions

Secondary head teachers

Officers:

Janet Beckett

Natalie Cole

Charlotte Fenn (Clerk)

Sue Lawson

Mark Parkinson

Janine Smart

Official observers:

**Observers/
public:**

1. Introductions and apologies

Apologies were received from David Curry, Ian Devereux- Roberts currently covering for Chris Priddey who was on paternity leave, Greg Foster, Kerry Kirkwood, Francis Kwateng, Kathryn Magiera, Martin Nield and Harry Ziman.

David Charlton welcomed three new members to the group:

Katie Tyrie, new nursery head representative, who had been appointed as the new head at St Mary's nursery following the retirement of Ken Jones;

Caroline Vile, Head teacher Ellesmere Port Catholic High School, diocesan representative taking over from John Murray;
Paula Adolph from Whitby Heath Pre-school, PVI representative, who replaced Angelina Wheeler who's term of office ended in May 2016.

It was also noted that Sue Anderson, The Beeches Pre-school, had been named as the PVI substitute.

David Charlton also welcomed back Steve Dool, Sarah Lee and Harry Ziman who had been re-elected as academy representatives and Sue Yates who had been re-elected as secondary head representative following their term of office ending.

It was also noted that Joy Verrier would no longer be acting as primary governor substitute as she had retired from her governor role.

2. Minutes and matters arising of last meeting

2.1 Minutes of the last meeting

The minutes of the meeting held on 14 March 2016 were agreed as a correct record.

2.2 Matters arising

None to report.

3. Children and Families – Basic Need Capital Programme 2016-2019

David Charlton welcomed Janine Smart to her first Schools Forum meeting as Capital Development Manager.

David Charlton declared an interest and offered to step down as chair for this item, if the Forum so wished, Forum members were happy for David to continue in the chair.

Janine Smart took Forum members through the paper which provided an update on the Children and Families Basic Need Capital Programme. It was noted that the current strategy was for three financial years and a revised strategy would be drawn up over the next few months and brought to Schools Forum in the spring term.

Janine Smart sought to clarify questions regarding the reported zero funding for 2018-2019. It was noted that, in broad terms, the allocations were calculated by looking at the pupil forecast need of places against the capacity of schools minus planned changes already funded. At present the EFA (Education Funding Agency) deemed CWAC sufficiently funded to meet its forecast needs at this point in time but this may change with future forecasts.

It was noted that this funding was not ring fenced but the LA had historically used the funding in full to support the schools programme and continued to do so.

Janine Smart emphasised that the programme delivery dates, in appendix 1, were anticipated dates as there were many factors that could impact on programme delivery.

Sam Myres-Whittaker sought clarification regarding the planned investment at Oaklands special school. Janine Smart reported that the work to be carried out was to make the accommodation fit for purpose for the current pupils and not to accommodate an increase in PAN (published admission numbers).

It was noted that consultations would be carried in relation to an increase in PAN where necessary.

Mark Parkinson, Director of Education, informed Forum members that, following the retirement of Claire Gregory, Carolyn Davis had taken over her role as Senior Manager and was delighted to have Janine Smart as the new Capital Development Manager, who was a great addition to the team. Mark Parkinson urged colleagues to 'pick up the phone' and contact Janine at an early stage if they needed to discuss any capital development issues.

Resolved that the Schools Forum note the paper.

4. School Intervention budget 2015-2016

Janet Beckett, School Intervention and Schools Causing Concern Manager, introduced the paper which informed Forum members as to how the School Intervention budget was deployed during 2015-2016.

Janet Beckett informed the group that, should a school receiving school intervention support receive a good Ofsted judgement during this time, resources would not be withdrawn immediately but would continue to ensure completion of any ongoing initiatives where necessary.

Forum members' attention was drawn to paragraph 5.4; Janet Beckett informed the group that, although the standards in academies were the responsibility of the DfE, it did not mean that academies did not get support from the school intervention budget only that they would not be assigned an ASIA (associate school improvement adviser) or curriculum adviser. It was noted that the role of the Regional School Commissioners (RSC) was not new, however they now had powers to act on behalf of the government in relation to failing, underperforming and coasting schools.

Janet Beckett informed Forum members that there were areas that the School Improvement team would be reviewing in particular 'coasting schools' and school governance which was now high profile due to the new duty of facilitating the conversion to academy.

Forum members supported Sarah Lee's observation that the increase of the proportion of CWAC pupils in good and outstanding schools, outlined in paragraph 9.5, was worth celebrating.

Mark Parkinson acknowledged Sue Pearson's comment, that the RSC had recently referred to CWAC schools as 'light touch', as a success story which demonstrated how all concerned had worked together in partnership.

Resolved that the Schools Forum note the paper.

5. Early Years National Funding Formula (EYNFF) Consultation August 2016

David Charlton drew Forum members' attention to the tabled paper which contained the draft consultation response from the Early Years reference group which would be referred to during the item.

Natalie Cole, Finance Manager, presented the report which outlined the key proposals and potential impact of the Government consultation for the introduction of an EYNFF.

It was noted that, although the implementation of the schools national funding formula had been postponed, the Government still intended to implement the EYNFF from April 2017.

Forum members' attention was drawn to paragraph 5 which summarised the consultation proposals.

It was noted that CWAC was one of the 25% of LA's that stood to lose from the proposals with a funding reduction of 631k by 2018-2019.

Natalie Cole warned the Forum that the impact on providers was not explicit in the consultation; any gains would be negligible due to the changes and removal of some supplements. The cap on central spend would also have an impact as some services would have to be withdrawn or offered as a traded service.

It was noted that a significant amount of work was required, as outlined in next steps paragraphs 17 – 18, within a tight timescale to ensure implementation by April 2017.

Sue Lawson, Commissioning Manager, referred Forum members to the draft response to the consultation. It was noted that the early years reference group, in formulating their response, had found some of the questions badly worded and unclear and were unable to form an opinion on some due to the lack of, and clarity of, information provided in the consultation document. It was noted that the group had also raised concerns in their response regarding the lack of guidance on cross boarder issues with Scotland & Wales and the lack of direction on the lump sum for nursery schools.

Sue Lawson informed Forum members that CWAC was a loser in part due to the LA being more generous in its supplements and still retaining an Early Years Team, which many LA's no longer had.

The group discussed the consultation response and put forward some observations. Concerns were raised that nursery's were vulnerable and would suffer as a result of the proposals and some may shut; removal of the quality supplement would reduce the ability to monitor quality of provision and this in turn may have a knock on effect in schools. The consultation response needed to reflect that any changes need to ensure funding went to those who needed it most and LAs should not be penalised for keeping a service doing well.

Mark Parkinson commented that it was ironic as CWAC had seen its best year's performance in Early Years and were second best in the North West.

The Forum commented that there was still an issue regarding parents registering for free school meals in light of the universal infant free school meals policy; it was noted that this had been flagged as an issue in the consultation response and use of IDACI (Income Deprivation Affecting Children Index) as an alternative raised.

It was acknowledged that work by schools and the LA continued to be done to ensure eligible pupils register for free school meals.

David Charlton thanked colleagues and the early years reference group for the work put into completing the consultation response.

Resolved that the Schools Forum agreed the response to the consultation from the Early Years Reference Group subject to incorporating Forum members' observations.

6. Maintained School Balances Financial Year 2015-2016

Natalie Cole introduced the paper which informed the Schools Forum of the final outturn position of maintained schools. It was noted that the figures did not include academies.

Natalie Cole apologised for errors in the figures in paragraph 5; however the school balances in the table were correct for 2015-2016.

It was noted that paragraph 5 should read as:

The net surplus is made up of **£11.5m** of surplus balances across **124** schools and **£0.861m** of deficit balances. There are **16** schools with deficit balances which is a **decrease of eight** on **2014-2015**.

It was noted that the Balance Control Mechanism (BCM) and requirement for schools to submit plans for unspent balances was not in operation, largely due to a decision based on equity with academies, though Officers would review schools with excessive balances.

Steve Dool brought to the Forum's attention a decision made at a previous meeting that academies figures should be included. It was acknowledged that this had been suggested but no mechanism to secure the figures had been agreed.

Forum members discussed how this could be achieved in light of the fact that academies operated on an academic financial year and sponsored trusts might

publish only accumulated accounts rather than individual academy accounts and pool funds.

Luci Jones informed Forum members that MATs (Multi Agency Trust) could choose to publish individual academy accounts, as did her trust. It was also noted that the EFA required final accounts by 31 December which were published on the website on 31 January.

Questions were asked as to what action could be taken if this data raised an issue. It was acknowledged that the LA could not take any action but it would provide a fuller financial picture of how schools were doing and show, for example, areas of deprivations.

Natalie Cole sought agreement from the Schools Forum that when requests for spending plans from schools who had in excess of the BCM threshold were issued, that it stated that the plans were being requested with the agreement of the Schools Forum. Schools Forum agreed this request.

Forum members sought clarification as to what would happen following the submission of these spending plans. Officers confirmed no formal process had been put in place as yet other than the plans being reviewed, sense checked and monitored by finance colleagues and Mark Parkinson, and challenging schools that had consistently held excess funds but were claiming, for example, that they had insufficient funds for SEN etc. It was noted that there had been £5m slippage on the plans submitted last year. Officers sought suggestions from Schools Forum as to how they would like to proceed to ensure a robust system was in place in the absence of the BCM and how much involvement they wished to have.

The group discussed various options including sharing plans with the Schools Forum finance sub group, Schools Forum member to engage in conversation with schools, balances to be shared with all schools, review where schools were up to with their financial training, reconsider clawing back excess funds. It was noted that a claw back mechanism was included in the Scheme for Financing Schools, but schools would need to be made aware of this. It was acknowledged that, prior to any action, the facts behind excess balances should be sought. It was noted that school balances for the last three years would be published and in the public domain.

Hilary Berry suggested that, subject to CWAPH executive approval, she could contact Headteachers, in schools identified by Natalie Cole as having successive three year underspends, to gain an understanding of the context and rationale of the underspends and to offer support and advice in relation to prudent and efficient financial planning.

Resolved that the Schools Forum

- i. noted the outturn position and movement in school balances and the mechanisms in place to support schools with deficit balances;
- ii. tasked Officers to write to academies in early January, as recommended by academy representatives, and request balances for two years; and
- iii. endorsed Officers request for spending plans from schools who had in excess of the BCM threshold to state that the plans were being requested

with the agreement of the Schools Forum (vote: unanimous).

7. Dedicated Schools Grant (DSG) 2015-2016 – Final Outturn

Natalie Cole introduced the item which reported on the 2015-2016 final outturn position for the centrally held DSG budget. It was noted that the £0.072m underspend was significantly lower than in previous years.

Natalie Cole went through the key areas that contributed to the net underspend outlined in paragraph 4. It was noted that the underspend was mainly attributed to the prior year's rates rebate under the de-delegated budgets.

Resolved that the Schools Forum:-

- i. noted the final outturn on the 2015-2016 centrally held DSG; and
- ii. endorsed the retention of the unspent £0.072m from the 2015-2016 allocation in reserves to offset forecast pressures in high needs in 2016-2017.

8. Final Allocation of the Dedicated Schools Grant for 2016-2017

Natalie Cole introduced the paper which reported the final allocation of the DSG for 2016-2017 highlighting the changes from the draft allocation used in budget setting for this financial year.

Forum members' attention was drawn to tables 1 and 2 which summarised the changes to the allocation since January 2016. It was noted that the figures reflected changes in high needs commissioned places and early years census data.

Resolved that the Schools Forum noted the amendments to the DSG allocation for the high needs and early years funding blocks and the adjustments to centrally held budgets for 2016-2017.

9. Dedicated Schools Grant (DSG) 2016-2017 Forecast Outturn at First Review

David Charlton referred Forum members to the paper that had been tabled.

Natalie Cole introduced the paper which provided an update on the financial forecast outturn position for 2016-2017 for centrally held DSG as reported at the First Review. This was based on the position at July 2016. It was noted that this item had been tabled as the information was not in the public domain at the time the Schools Forum papers were circulated.

Natalie Cole took Forum members through the paper and drew their attention to the key variances which contributed to the net overspend of £0.408m. It was noted the key factor to the overspend was the increased demand on SEN top-up payments in special and mainstream schools and that demand was likely to continue to grow. The retention of the unspent £0.072m from the 2015-2016 allocation, as reported under item 7, would offset some of the forecast pressure for 2016-2017; however it was noted that these ongoing budget pressures would have to be factored into the 2017-2018 budget.

It was noted that the underlying net overspend was £612k, on the assumption that the de-delegated balances (£204k) were earmarked carry forwards for 2017-2018.

Officers reported that the f40 group had been doing some work on SEN and reported there was national pressure on the high needs block; CWAC were in a better position than some LAs who had already had to move funding from the schools block into the high needs block.

Resolved that the Schools Forum noted the First Review position on the DSG.

10.2016-2017 School Funding Arrangements – National Data Comparison

Natalie Cole introduced the report which provided an overview of the national analyses of schools block funding formulae and sought feedback from Schools Forum as to whether there were any formula factors that they wished to be reviewed.

It was noted that there had been little movement across the factors and most of CWAC formula factors remained close to the national average.

Forum members commented on the change in primary:secondary ratio ranking from 20th lowest to 13th lowest as this was an area that Officers had tried to address in the past. Officers were not in a position to explain the change from the data provided by the EFA, but thought it was likely that the inclusion of free schools into the data had skewed the national average and possible changes to formula factors by other LAs may have had an impact on CWAC's ranking.

It was noted that the number of small schools receiving a lump sum was still the main element having an impact on the primary:secondary ratio. Forum members asked if having a differential lump sum for small schools within a MAT was feasible to reflect the reduction in centralised costs such as admin. Officers reported that this was not allowed under the regulations.

Members asked if the national school funding formula (NSFF) could have an impact on the primary:secondary ratio; Officers responded that there was no way of knowing at this stage.

Forum members raised concerns that the new NSFF may make some small schools unsustainable. Officers acknowledged that sustainability of small schools was an issue and difficult to address; proactively suggesting closure of schools that might become unsustainable would only lead to schools becoming academies.

Resolved that the Schools Forum noted the comparison between the national data and Cheshire West and Chester's data.

11. School Funding Arrangements 2017-2018

Natalie Cole introduced the report which outlined the key changes set out by the EFA for school funding arrangements for 2017-2018.

It was noted that funding arrangements were largely unchanged from 2016-2017 though some changes had been made to reflect the move towards a national funding formula.

Natalie Cole informed Forum members that the requirement to re-baseline funding to reflect current spend had resulted in an increase in the schools block which should result in an increase to the DSG allocation for 2017-2018.

Forum members noted that the Education Support Grant (ESG), which funded statutory LA responsibilities, was being cut however the responsibilities remained. This funding would now become part of a new central spend block within the DSG. Officers would need to work with the Schools Forum finance sub group to look at retaining sufficient funds to cover statutory duties previously funded through the ESG.

Forum members' attention was drawn to paragraph 10 which outlined the changes to the IDACI bands which effectively lower the threshold making more pupils eligible. If the new bands were applied to the current cohort it would cost an extra £1m. How these changes leave CWAC nationally was unclear. Further modelling would need to be done to review the formula values for 2017-2018 with the finance sub group.

It was noted that the LA was no longer required to make an October funding formula submission giving the LA and Schools Forum more time to consider funding allocations prior to the January submission.

Resolved that the Schools Forum:

- i. noted the changes to funding arrangements outlined in the report; and
- ii. agreed recommendations be made by Finance Sub Group at the December meeting for
 - the changes in funding arrangements for Income Deprivation Affecting Children Index (IDACI) bands and
 - the retention of DSG for ongoing responsibilities previously covered by the Education Services Grant (ESG).

12. Annual review of the Cheshire West and Chester Schools Forum's membership, constitution and terms of reference

David Charlton introduced the report to review the Schools Forum's membership, constitution and terms of reference. It was noted that the membership in appendix 1 had changed since the paper had been circulated as outlined under agenda item 1. Sam Myers Whittaker reported that Judith McGuinness (special school head substitute) was now Head at Dee Banks School.

Forum members' attention was drawn to table 1 which listed governor representatives whose term of office were due to end this term and the election scheme outlined in appendix 3.

John Freeman asked if anything had been put in place to prevent ineligible nominations being put forward, as had happened in the past. Charlotte Fenn

reported that nominations now had to be endorsed by the Chair of Governors, prior to submission.

Resolved that the Schools Forum

- i. noted that there were no changes to the current constitution and terms of reference; and
- ii. endorsed the proposal to seek governor nominations to fill the vacancies which would arise due to the terms of office coming to an end using the scheme outlined in appendix 3.

13. Any Other Business

Duncan Haworth sought an update on the apprenticeship levy. Natalie Cole reported that Officers were waiting for a steer from the Council and there was also the size of employer issue to clarify. Officers agreed to follow up on this and report back.

14. Next meeting

Monday 12 December 2016 Queen's Park High School 4.30 - 6.30.

Agenda Item 3

Dedicated Schools Grant (DSG) 2016-2017 Forecast Mid Year Review

Purpose of the Report

1. The purpose of the report is to provide an update on the financial forecast outturn position for 2016-2017 for centrally held DSG as reported at the Mid Year Review (MYR). This is based on the position at September 2016.

Recommendations

2. The Forum is asked to note the Mid Year Review position on the DSG.

Forecast Outturn

3. The MYR forecast outturn position for the centrally held DSG is a net overspend of £0.322m, which has improved by £0.086m since the First Review. However, the net position masks a number of key variances as summarised below:-
 - There is a forecast overspend of £0.991m (up from £0.833m) due to increased demand for Special Educational Needs top-up payments.
 - Early Years is now forecasting an overspend of £0.178m (previously £nil) due to an increase in demand for 3-4 year olds.
 - This is partially offset by reduced costs for both Independent School Fees of £0.218m (previously £112k) and children placed in other Authority's schools of £ 0.073m (was £0.064m).
 - The de-delegated schools budget, which is traditionally ring-fenced to maintained schools, is forecast to underspend by £0.599m, which is a significant increase from First Quarter, which was reporting an underspend of £0.204m. This is primarily due to an increase in prior year Rates rebates as well as calls on contingencies being lower than anticipated.
 - Various minor under/overspend giving rise to a net overspend of £43k.
4. On the assumption that the de-delegated balances are earmarked carry forwards for 2017-2018, the underlying net overspend 2016-2017 is £0.921m (up from £0.612m), which is due to increased demand for SEN and Early Years budget pressures. Officers will continue to monitor the financial position and seek ways to mitigate the impact, but Schools Forum should note that, in the first instance, this will be a call on the 2017-2018 DSG budget. In addition, the future year impact of any ongoing budget pressure arising this year will also need to be factored into the 2017-2018 budget.

Next Steps

5. To review the forecast DSG outturn position as part of the Third Review.

Agenda item 5

Changes in funding arrangements for Income Deprivation Affecting Children Index (IDACI) bands

Purpose of the Report

1. This report sets out the review undertaken by the Finance Sub Group of the impact of the change in IDACI bands for the 2017-2018 Schools Block funding formula.

Recommendation

2. That the Schools Forum approve the recommendation of the Finance Sub Group to revise the bands and values used to allocate funding through the IDACI deprivation factor in the Schools Block funding formula for 2017-2018. (See paragraph 8).

Background

3. As reported to Schools Forum in September 2016, following the 2015 dataset update which showed a considerably different distribution of deprivation to the previous 2010 dataset, the EFA have redesigned the bands in which funding can be allocated using IDACI. The bands have been revised to make them similar to pupil numbers eligible in the previous year under the 2010 dataset. The revised bands will be A – G rather than 1-6 with changes to the IDACI score within each band. The following table sets out the changes in bands that will apply for 2017-2018.

Proportion of pupils in each IDACI band in the 2015 to 2016 and 2016 to 2017 schools block dataset mapped on to new bands

Bands used in 2015-16 and 2016-17	IDACI score	% pupils in each band (2015-16)	% pupils in each band (2016-17)	New bands for 2017-18	IDACI score	% pupils in each new band (2015 October census)
T	U	V	W	X	Y	Z
6	Between 0.60 and 1.00	3%	1%	A	Between 0.50 and 1.00	3%
5	Between 0.50 and 0.60	6%	3%	B	Between 0.40 and 0.50	8%
4	Between 0.40 and 0.50	10%	8%	C	Between 0.35 and 0.40	7%
3	Between 0.30 and 0.40	12%	14%	D	Between 0.30 and 0.35	8%
2	Between 0.25 and 0.30	7%	9%	E	Between 0.25 and 0.30	9%
1	Between 0.20 and 0.25	8%	10%	F	Between 0.20 and 0.25	10%
0	Less than 0.20	53%	56%	G	Less than 0.20	56%

Effect of the banding change for Cheshire West and Chester

4. The updated dataset applied in 2016-2017 resulted in a significant shift from 2015-2016 in the number of pupils allocated in each band and a reduction in pupils in the funded bands 4 - 6. The revisions to bands for 2017-2018 will effectively reverse that change. However, the IDACI scores for bands 4 - 6 have also been revised which means that far more pupils will be counted in the top 3 bands than in the last financial year. This is the result of lowering the lower threshold in Band 4 from 0.4 probability of deprivation to 0.35 in the new Band C. The change is summarised in the table below.

IDACI Band	Number of pupils Financial Year 2015- 2016	Number of pupils Financial Year 2016- 2017	Number of pupils Financial Year 2016-2017 - revised bands
IDACI Units Band 4/C	2,937	2,678	2,628
IDACI Units Band 5/B	1,565	931	2,690
IDACI Units Band 6/A	238	2	941
Pupils Funded through IDACI	4,741	3,611	6,259

5. In 2016-2017, to counter the effect of the fewer pupil numbers in bands 4 - 6, the unit values in the funding formula were adjusted upwards so that the same proportion of total deprivation funding (10%) was allocated through IDACI as in the previous year. With increased pupil numbers now included within the new bands for 2017-2018 this would inevitably have a cost implication within the formula if the unit rates were to remain at the same level. As such, a number of options have been reviewed by the Finance Sub Group.

Recommendation of the Finance Sub Group

6. The Finance Sub Group reviewed the impact of leaving the unit rates at their current levels. This would result in an additional £1.2m being allocated through IDACI and being targeted through deprivation instead of the basic per pupil entitlement. The Group felt that the aim should be to maintain the original principles for allocating funding through IDACI which were:
- to apply to 10% of total deprivation funding, and
 - to target funding at the higher levels of deprivation in bands 4 and above i.e. above a 0.4 probability of deprivation.
7. The Group therefore considered the option for 2017-2018 to fund bands A and B and to reduce the funding rates proportionally and equally between primary and secondary to the same level of total funding as in 2016-2017 at 10% of deprivation. This option results in very little change at individual school level based on the current dataset and was therefore the recommendation of the Group. The change for individual schools is shown in Appendix A.

8. The indicative revised rates would be as follows. However, these will need to be reviewed further when the October 2016 data set is available to maintain the principles above.

Description	2016-2017 Actual Rates		2017-2018 Indicative Rates	
	Primary amount per pupil	Secondary amount per pupil	Primary amount per pupil	Secondary amount per pupil
IDACI Band 4/C	£336.55	£417.82	£0.00	£0.00
IDACI Band 5/B	£394.57	£489.86	£333.59	£415.02
IDACI Band 6/C	£452.60	£561.90	£400.31	£498.03

Next Steps

9. To include the revised values and bands in the funding formula submission in January.

Appendix A Comparison of current 2016-2017 IDACI allocations and indicative rates for 2017-2018

School	IDACI funding based on current rates 2016-2017				IDACI funding based on indicative rates 2017-2018			Increase / - decrease £
	IDACI Band 4 £	IDACI Band 5 £	IDACI Band 6 £	Total IDACI £	IDACI Band B £	IDACI Band A £	Total IDACI £	
Primary Maintained								
Acresfield Primary	325	0	0	325	324	0	324	-1
All Saints Saughall	2,279	0	0	2,279	2,259	0	2,259	-20
Alvanley Primary	0	0	0	0	0	0	0	0
Antrobus St Marks Pr	346	0	0	346	343	0	343	-3
Ashton Hayes Primary	0	0	0	0	0	0	0	0
Aston by Sutton Pri	6,529	1,209	0	7,738	6,472	1,226	7,698	-40
Barnton Primary	0	0	0	0	0	0	0	0
Barrow C of E Primary	0	0	0	0	0	0	0	0
Belgrave Primary	1,015	0	0	1,015	1,006	0	1,006	-9
Brookside Primary	11,228	0	0	11,228	11,129	0	11,129	-99
Burton Bishop Wilson Pr	341	0	0	341	338	0	338	-3
Byley Primary	337	0	0	337	334	0	334	-3
Cambridge Road Pr	18,510	0	0	18,510	18,439	0	18,439	-71
Capenhurst Primary	1,026	0	0	1,026	1,017	0	1,017	-9
Charles Darwin Primary	2,019	395	0	2,414	2,002	400	2,402	-12
Cherry Grove Primary	342	0	0	342	341	0	341	-1
Chester Blue Coat Pr	13,097	0	0	13,097	12,982	0	12,982	-115
Childer Thornton Primary	1,030	0	0	1,030	1,021	0	1,021	-9
Christleton Primary	0	0	0	0	0	0	0	0
Clutton C of E Primary	0	0	0	0	0	0	0	0
Comberbach Primary	0	0	0	0	0	0	0	0
Crowton ChristChurch Pr	0	789	0	789	0	801	801	12
Cuddington Primary	1,353	1,982	0	3,335	1,341	2,011	3,352	17

IDACI funding based on current rates 2016-2017

IDACI funding based on indicative rates 2017-2018

School	IDACI Band 4	IDACI Band 5	IDACI Band 6	Total IDACI	IDACI Band B	IDACI Band A	Total IDACI	Increase / - decrease
	£	£	£	£	£	£	£	
Darnhall Primary	7,177	53,161	0	60,338	7,114	53,935	61,049	711
Davenham Primary	0	795	0	795	0	806	806	11
Dee Point Primary	28,283	0	0	28,283	28,034	0	28,034	-249
Dodleston Primary	0	0	0	0	0	0	0	0
Duddon St Peter's Pr	0	0	0	0	0	0	0	0
Eaton Primary	0	789	0	789	0	801	801	12
Eccleston C of E Primary	773	0	0	773	766	0	766	-7
Ellesmere P Christ Church	10,097	395	0	10,492	10,008	400	10,408	-84
Elton Primary	337	0	0	337	334	0	334	-3
Farndon Primary	0	0	0	0	0	0	0	0
Frodsham Primary	0	0	0	0	0	0	0	0
Frodsham ManorHouse Pr	337	395	0	732	337	404	741	9
Frodsham Weaver Vale Pr	621	364	0	985	616	370	986	1
Gt Budworth C of E Primary	337	0	0	337	334	0	334	-3
Guilden Sutton Primary	0	0	0	0	0	0	0	0
Hartford Manor Primary	1,350	1,187	0	2,537	1,338	1,204	2,542	5
Hartford Primary	673	0	0	673	671	0	671	-2
Helsby Hillside Primary	0	0	0	0	0	0	0	0
Highfield Primary	13,818	0	0	13,818	13,697	0	13,697	-121
Hoole Community	1,024	0	459	1,483	1,015	406	1,421	-62
Horn's Mill Primary	337	0	0	337	334	0	334	-3
Huntington Primary	0	0	0	0	0	0	0	0
Huxley C of E Primary	0	0	0	0	0	0	0	0
J H Godwin Primary	23,124	0	0	23,124	22,921	0	22,921	-203

IDACI funding based on current rates 2016-2017

IDACI funding based on indicative rates 2017-2018

School	IDACI Band 4	IDACI Band 5	IDACI Band 6	Total IDACI	IDACI Band B	IDACI Band A	Total IDACI	Increase / - decrease
	£	£	£	£	£	£	£	
Kingsley Primary	0	0	0	0	0	0	0	0
Kingsley St John's Primary	0	0	0	0	0	0	0	0
Kingsmead	0	0	0	0	0	0	0	0
Lache Primary	26,433	0	0	26,433	26,332	0	26,332	-101
Leftwich Primary	0	793	0	793	0	805	805	12
Little Leigh Primary	0	0	0	0	0	0	0	0
Little Sutton C of E Primary	337	0	0	337	334	0	334	-3
Lostock Gralam Primary	1,683	0	0	1,683	1,677	0	1,677	-6
Lower Peover Primary	338	0	0	338	335	0	335	-3
Malpas Alport Primary	0	0	0	0	0	0	0	0
Manley Village	0	0	0	0	0	0	0	0
Meadow Primary	5,115	0	0	5,115	5,070	0	5,070	-45
Mickle Trafford Village	0	0	0	0	0	0	0	0
Moulton Primary	0	0	0	0	0	0	0	0
Neston Primary	0	0	0	0	0	0	0	0
Newton Primary	1,018	0	0	1,018	1,009	0	1,009	-9
Norley C of E Primary	0	0	0	0	0	0	0	0
Oldfield Primary	0	0	0	0	0	0	0	0
Our Lady Star of the Sea	17,206	0	0	17,206	17,055	0	17,055	-151
Over St Johns Primary	1,017	11,125	0	12,142	1,008	11,287	12,295	153
Overleigh St Mary's Pri	4,347	0	0	4,347	4,320	0	4,320	-27
Parkgate Primary	0	0	0	0	0	0	0	0
Parklands Primary	1,354	0	0	1,354	1,350	0	1,350	-4
Rivacre Valley Primary	6,731	0	0	6,731	6,743	0	6,743	12

IDACI funding based on current rates 2016-2017

IDACI funding based on indicative rates 2017-2018

School	IDACI	IDACI	IDACI	Total	IDACI	IDACI	Total	Increase / - decrease £
	Band 4 £	Band 5 £	Band 6 £	IDACI £	Band B £	Band A £	IDACI £	
Rossmore Primary	6,772	0	0	6,772	6,712	0	6,712	-60
Saighton C of E Primary	343	402	0	745	340	408	748	3
Sandiway Primary	1,010	0	0	1,010	1,001	0	1,001	-9
Shocklach Oviatt Primary	0	0	0	0	0	0	0	0
St Bede's Catholic Primary	337	0	0	337	334	0	334	-3
St Clare's Catholic Primary	16,953	0	0	16,953	16,804	0	16,804	-149
St Joseph's Catholic Pri	7,741	14,994	0	22,735	7,673	15,212	22,885	150
St Luke's Catholic Primary	0	0	0	0	0	0	0	0
St Mary of the Angels	2,019	0	0	2,019	2,002	0	2,002	-17
St Oswald's C of E Primary	1,169	0	0	1,169	1,159	0	1,159	-10
St Saviour's Primary	9,905	0	0	9,905	9,818	0	9,818	-87
St Theresa's Primary	21,203	0	0	21,203	21,016	0	21,016	-187
St Werburgh'sSt Columba's	2,718	0	0	2,718	2,703	0	2,703	-15
St Wilfrid's Catholic Primary	2,692	395	0	3,087	2,669	400	3,069	-18
St Winefrides Primary	337	0	0	337	334	0	334	-3
Sutton Green Primary	2,356	0	0	2,356	2,335	0	2,335	-21
Tarporley C of E Primary	0	0	0	0	0	0	0	0
Tarvin Primary	0	0	0	0	0	0	0	0
Tattenhall Park Primary	0	0	0	0	0	0	0	0
The Acorns	48,295	0	0	48,295	48,035	0	48,035	-260
The Arches Primary	18,246	0	0	18,246	18,085	0	18,085	-161
The Oaks	16,154	0	0	16,154	16,012	0	16,012	-142
Tilston Parochial Primary	0	0	0	0	0	0	0	0
Tushingam-with-Grindley	0	0	0	0	0	0	0	0

IDACI funding based on current rates 2016-2017

IDACI funding based on indicative rates 2017-2018

School	IDACI Band 4	IDACI Band 5	IDACI Band 6	Total IDACI	IDACI Band B	IDACI Band A	Total IDACI	Increase / - decrease
	£	£	£	£	£	£	£	
Upton Heath Primary	1,346	0	0	1,346	1,355	0	1,355	9
Upton Westlea Primary	2,880	0	0	2,880	2,854	0	2,854	-26
Utkinton St Paul's Primary	0	0	0	0	0	0	0	0
Victoria Road Primary	14,213	0	0	14,213	14,088	0	14,088	-125
Waverton Primary	0	0	0	0	0	0	0	0
Weaverham Forest Primary	337	0	0	337	334	0	334	-3
Westminster Primary	673	0	0	673	678	0	678	5
Wharton C of E Primary	337	13,021	0	13,358	334	13,210	13,544	186
Whitby Heath Primary	23,623	0	0	23,623	23,479	0	23,479	-144
Whitegate C of E Primary	1,346	395	0	1,741	1,334	400	1,734	-7
Whitley Village	0	0	0	0	0	0	0	0
Willaston C of E Primary	338	0	0	338	335	0	335	-3
William Stockton Primary	56,740	0	0	56,740	56,242	0	56,242	-498
Willow Wood Primary	0	57,737	0	57,737	0	58,577	58,577	840
Wimboldsley Primary	673	789	0	1,462	667	801	1,468	6
Wincham Primary	337	0	0	337	334	0	334	-3
Winnington Park Primary	1,352	0	0	1,352	2,020	0	2,020	668
Winsford Grange Primary	673	7,891	0	8,564	667	8,006	8,673	109
Winsford High St	6,394	10,259	0	16,653	6,338	10,408	16,746	93
Winsford St Chads Primary	2,692	8,681	0	11,373	2,669	8,807	11,476	103
Witton Church Walk Primary	16,730	0	0	16,730	16,643	0	16,643	-87
Wolverham Primary	11,443	0	0	11,443	11,342	0	11,342	-101
Woodfall Primary	338	0	0	338	335	0	335	-3
Woodlands Primary	4,753	0	0	4,753	4,711	0	4,711	-42

IDACI funding based on current rates 2016-2017

IDACI funding based on indicative rates 2017-2018

School	IDACI Band 4 £	IDACI Band 5 £	IDACI Band 6 £	Total IDACI £	IDACI Band B £	IDACI Band A £	Total IDACI £	Increase / - decrease £
Primary Academy								
Boughton Heath Primary	0	0	0	0	0	0	0	0
Delamere C of E Academy	677	0	0	677	684	0	684	7
Kelsall Primary Academy	0	0	0	0	0	0	0	0
Mill View Primary	340	0	0	340	337	0	337	-3
Oak View Academy	6,731	28,409	0	35,140	6,672	28,822	35,494	354
Over Hall Primary Academy	27,597	27,225	0	54,822	27,355	27,621	54,976	154
Rudheath Academy	8,781	0	0	8,781	8,797	0	8,797	16
St Bernard's Academy	24,364	0	0	24,364	24,150	0	24,150	-214
St Martin's Academy	0	0	0	0	0	0	0	0
University Cathedral Free School	440	0	0	440	436	0	436	-4
University Primary Academy	0	0	0	0	0	0	0	0
Secondary Maintained								
Bishop Heber High	0	0	0	0	0	0	0	0
Blacon High	41,788	0	0	41,788	41,509	0	41,509	-279
Ellesmere Port Catholic Hig	46,095	491	0	46,586	45,786	499	46,285	-301
Hartford High	7,557	12,305	0	19,862	7,506	12,510	20,016	154
Helsby High	1,253	1,959	0	3,212	1,247	1,996	3,243	31
Queen's Park High	20,971	0	0	20,971	20,830	0	20,830	-141
St Nicholas Catholic High	4,553	9,220	0	13,773	4,522	9,373	13,895	122
The Whitby High	69,045	0	0	69,045	68,635	0	68,635	-410
Upton-by-Chester High	14,092	0	0	14,092	14,069	0	14,069	-23
Weaverham High	2,091	5,394	0	7,485	2,077	5,484	7,561	76

IDACI funding based on current rates 2016-2017

IDACI funding based on indicative rates 2017-2018

School	IDACI Band 4 £	IDACI Band 5 £	IDACI Band 6 £	Total IDACI £	IDACI Band B £	IDACI Band A £	Total IDACI £	Increase / - decrease £
Secondary Academy								
Chester The Catholic High	32,048	0	0	32,048	31,942	0	31,942	-106
Christleton High	1,268	0	0	1,268	1,263	0	1,263	-5
E'Port UCA Academy	77,221	0	0	77,221	76,704	0	76,704	-517
Leftwich The County High	4,610	9,828	0	14,438	4,580	9,992	14,572	134
Neston High	3,769	0	563	4,332	3,744	499	4,243	-89
Northwich UCA Academy	21,727	1,470	0	23,197	21,581	1,494	23,075	-122
Tarporley High School	2,925	3,919	0	6,844	2,928	4,015	6,943	99
The Bishop's Blue Coat	10,881	510	0	11,391	10,808	519	11,327	-64
The Winsford Academy	27,191	108,390	0	135,581	27,009	110,198	137,207	1,626
Totals								
Primary Maintained	519,112	187,943	459	707,514	515,891	191,085	706,976	-538
Primary Academy	68,930	55,634	0	124,564	68,431	56,443	124,874	310
Secondary Maintained	207,445	29,369	0	236,814	206,181	29,862	236,043	-771
Secondary Academy	181,640	124,117	563	306,320	180,559	126,717	307,276	956
Total Primary	588,042	243,577	459	832,078	584,322	247,528	831,850	-228
Total Secondary	389,085	153,486	563	543,134	386,740	156,579	543,319	185
Total	977,127	397,063	1,022	1,375,212	971,062	404,107	1,375,169	-43

**Cheshire West and Chester
Schools Forum
12 December 2016**

Agenda item 9

Schedule of meetings

Schools Forum – all meetings 4.30pm – 6.30pm (refreshments at 4pm) unless otherwise stated

Date	Venue	Proposed key agenda items
Monday 16 January 2017	Queen's Park High School	<ul style="list-style-type: none"> • combined budgets and miscellaneous expenditure • DSG allocations for 2017-2018 and budget setting • draft of 2017-2018 school funding formula for January submission • de-delegation – proposals for 2017-2018
Monday 13 March 2017	Queen's Park High School	<ul style="list-style-type: none"> • SEN funding for mainstream and special schools – funding from the high needs block 2017-2018 • central spend budgets 2017-2018 • DSG 2016-2017 forecast outturn at third review • Basic needs capital programme • Academy balances
Monday 3 July 2017	Queen's Park High School	<ul style="list-style-type: none"> • School intervention funding 2016-2017 • School funding arrangements –national data comparison 2017-2018 • School funding arrangements for 2018-2019 • Directed revisions to schemes for financing schools • DSG 2016-2017 outturn • Financial year 2016-2017 analysis of schools balances • Annual review of Schools Forum membership, constitution and terms of reference

Schools Forum finance sub group – all meetings 2pm – 4pm unless otherwise stated

Date	Venue
Tuesday 13 December 2016	Nicholas House G2
Tuesday 28 February 2017	HQ 1.7
Tuesday 13 June 2017	HQ tbc
Tuesday 11 July 2017	HQ tbc