

SECTION 52 BENCHMARKING TABLES 2007/08

Report of the Director of Children Schools and Families

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1. Purpose of the Report

To present benchmarking information for the Forum to note as part of its scrutiny role and as background for the budget process.

2. Summary

This report provides an overview of the section 52 benchmarking data for 2007/08.

3. Conclusion

The Forum is asked to note the benchmarking data.

4. Background

4.1 The DCSF publishes annually tables of planned expenditure to allow Local Authorities and their Schools Forums to benchmark spending profiles. The latest tables compare data from the statutory Section 52 Budget Statements 2007/08 and include:

- A line by line comparison on a per pupil basis across both the Schools and LEA Budgets,
- Year on Year changes for a range of budget headings,
- Additional information covering for example the levels of Dedicated Schools Grant (DSG) and the extent of the application of the Minimum Funding Guarantee.

New sections to the tables for 2007/08 are:

- Free entitlement to early years table.
- AWPU funding ratios table by authority enabling individual authority ratios to be compared to the national average.

4.2 A summary of some of the more significant information is set out below, comparing Hertfordshire with national averages. The complete document can be found at <http://www.dfes.gov.uk/localauthorities/section52/>

4.3 All comparative data should be treated with some caution as differing patterns of provision in different authorities may impact on the data. For example, Hertfordshire has a larger number of sixth forms than many authorities, which impacts on the value of the Individual Schools Budget per pupil in secondary. Also, authorities, working with their

Forums in recent years will have taken different decisions around delegating resources to schools. As an example Hertfordshire in 2007/08:

- Retained Practical Learning 14-16 budgets centrally where some other authorities delegated the resource; and
- Retained most of the Pay Progression Grant whilst others delegated it in full.
- Devolved to schools rather than delegated SEN funding for statemented pupils (These impact on the Central Expenditure Limit)

5. Benchmarking Data

5.1 Table 1 – Gross Expenditure per pupil (“upper tier authorities” i.e. 34 counties). This table expresses the budgeted expenditure (from the section 52 budget statement) as £ per pupil. Shown below are the maximum, minimum and median figures relating to the 34 shire counties, for the main subtotals in the DCSF table.

	ISB inc grants	School Specific Contingency	Non Delegated SEN (Schools Budget)	PRUs, Behaviour Support, Education Otherwise	Private Voluntary & Independent Nurseries	School Budget-Central Admin (Inc. Admissions)	Capital expenditure from revenue	Total Schools Budget	Total LEA Budget
	£	£	£	£	£	£	£	£	£
Hertfordshire	3,846	13	196	59	74	33	52	4,309	465
Maximum	4,209	124	304	101	296	60	196	4,577	757
Minimum	3,574	3	88	24	41	6	0	4,101	358
Median	3,728	24	150	61	139	28	26	4,280	593
Herts Rank	8	30	9	20	31	13	9	15	30

5.2 Key Points about Hertfordshire’s figures:

- The level of the Individual Schools Budget (ISB), (i.e. the school budget shares), plus grants per pupil in Hertfordshire ranks the eighth highest of all counties. The relatively high levels of sixth form funding and nursery provision contribute to this.
- Non delegated SEN Funding is relatively high because the Predictable Needs funding is devolved rather than delegated to schools.
- Overall spend on PRUs, Education Otherwise and Behaviour Support is slightly less than the median despite the increases in recent years. (Delegated provision such as Primary Support Bases and Learning Support Units is not included in these figures).
- Spending on private nurseries is relatively low reflecting the high level of maintained nursery provision in Hertfordshire.

5.3 Table 2 – Percentage Change from 2006/07 to 2007/08 (upper tier authorities) This table shows the percentage change in cash budgets between years. The median figures and range showing the lowest changes and highest changes relate to the 34 shire counties.

	Overall Schools Budget	ISB plus pay progression grants	Non delegated SEN provision	Overall LEA Budget	Devolved grants	Pupil referral units	Education out of school
Hertfordshire	6.0%	5.0%	41.4%	-1.7%	19.0%	4.9%	45.8%
Maximum	6.4%	7.2%	44.6%	8.7%	39.4%	46.7%	84.3%
Minimum	3.3%	2.7%	-11.0%	-1.9%	4.2%	-52.1%	-20.3%
Median	5.5%	5.2%	6.4%	1.1%	18.4%	3.0%	9.0%

5.4 Within the detail of the DCSF tables, a number of points can be highlighted:

- In general nationally Schools Budgets have increased at a faster rate than LEA Budgets.
- The large increase in devolved grants relates to increases in the School Standards Grant and the introduction of the School Standards Grant (Personalisation)
- The high increase in non delegated SEN provision was due to the change in SEN funding arrangements. EPF and AW&T funding previously delegated in budget shares is now included within the non delegated budgets and devolved to schools. In addition the budget was increased by the allocation of £1.7m from headroom.
- An increase of 45.8% of the Education Out of School budget relates to the introduction of the KS4 Learning Centres and the increase in Youth Programmes.

5.5 Table 3 – Additional Information (upper tier authorities)

This table provides information about the Dedicated Schools Grant (DSG) and other aspects of authorities' Schools Budgets. As previously, the maximum, minimum and median figures relate to the 34 shire counties.

	Funding per pupil – DSG	DSG % increase per pupil	Primary/ Secondary ratio of expenditure per pupil	Primary schools on MFG	Secondary Schools on MFG	Central Expenditure Limit	Planned Expenditure Devolved to schools
	£	%	%	%	%	%	%
Maximum	3,831.15	6.7	94.5	83.8	87.2	151.9	93.7
Minimum	3,429.21	6.3	72.2	0.00	0.00	89.8	85.4
Median	3,642.35	6.5	79.6	23.6	6.8	100.6	89.7
Hertfordshire	3,730.25	6.4	73.7	23.1	7.3	129.8	89.9
- Rank	7	27	33	18	17	2	17

5.6 Key points:

- Hertfordshire continues to have one of the higher levels of DSG funding per pupil, although the increase in its funding in 2007/08 was slightly below the average.
- The primary/secondary funding differential is lower than the average for upper tier authorities. This figure is influenced by the high level of sixth form provision in Hertfordshire secondary schools which inflates the average expenditure per pupil figure in the secondary sector.
- Hertfordshire exceeded the Central Expenditure Limit. The main reason for exceeding the limit in Hertfordshire related to the treatment adopted for Pay Progression Grant, delegating within budget shares only leadership, UPS3 and UPS2 for secondary schools in 2007/08 whilst devolving the balance. (The majority of counties have delegated all Pay Progression Funding). The two other contributory factors in exceeding the limit are the retention of the 14-16 Practical Learning Funding (which is devolved to the Strategic Area Partnership Groups) and the introduction of the new SEN funding arrangements.
- The percentage of schools on the Minimum Funding Guarantee in Hertfordshire is very close to the national average. There is however wide variety on this across the country.

5.7 Table 4 - Free Entitlement to Early Years table, (upper tier authorities)

The data for this table was not available from the Section 52 Budget Statements and is drawn from the supplementary questionnaire on early years funding which the DCSF sent out in May and which related to 2006/07.

	Planned Expenditure on early years £ per pupil	Rate of funding for PVI Settings £ per pupil	Rate of funding for maintained nursery provision	No. of Pupils in maintained nursery schools	No. of Pupils in maintained nursery classes	No. of pupils in PVI settings
Hertfordshire	1796	1520	2020	1277	8159	5932
Maximum	1964	1596	2189	2300	9004	14962
Minimum	1085	1335	587	0	0	1238
Median	1663	1539	1637	299	2434	5504
Herts rank	2	20 (out of 31 counties with data)	5	3	3	13

5.8 Hertfordshire has proportionally more maintained nursery provision than most counties. Overall this maintained provision has a relatively high rate of funding compared to maintained provision in other counties, partly due to the significant number of pupils in nursery schools. (Nursery schools tend to have higher funding levels than nursery classes). In contrast the Hertfordshire rate of funding for PVI settings is slightly below the median for English counties.

5.9 Table 5 - AWPU Ratios

The national ratios published by the DCSF cover all authorities, not just counties:

	KS1	KS2	KS3	KS4
Hertfordshire	1.05	1.00	1.36	1.77
National Average	1.03	1.00	1.30	1.56

Hertfordshire has greater differentials between key stages than the national average. However, this data relates only to AWPU funding, not the whole budget share.

6. Statistical Neighbour Analysis

6.1 It is particularly appropriate to compare Hertfordshire's data against those authorities recognised as having socio-economic similarity to Hertfordshire, our "statistical neighbours".

An extract from comparative data across statistical neighbours is attached.

6.2 Overview

Many of the themes from the wider comparison with English counties continue in the statistical neighbour comparison. The high increase in non delegated funding relates to the changes in mainstream SEN funding arrangements. However, Hertfordshire's non delegated SEN funding and funding for PRUs / Behaviour Support/ Education Otherwise was almost exactly at the average of the statistical neighbours. Hertfordshire tended to have slightly fewer schools on the MFG.

Hertfordshire and its statistical neighbour authorities

Table 1 – Gross Expenditure per pupil 2007/08

	ISB Plus Grants £	Non Delegated SEN £	Behaviour Support, PRUs, Education Otherwise £	Total Schools Budget £	Total LEA Budget £
Statistical Neighbours (Median)	3,706	196	60	4,373	594
Hertfordshire	3,846	196	59	4,309	465
Bracknell Forest	3,670	338	77	4,494	594
Bedfordshire	3,900	159	74	4,510	756
Hampshire	3,611	141	60	4,211	460
Oxfordshire	3,697	165	31	4,392	694
Cambridgeshire	3,638	149	92	4,207	486
West Berkshire	3,976	239	66	4,567	403
Buckinghamshire	3,673	280	41	4,510	695
Cheshire	3,706	198	49	4,244	667
Trafford	3,849	165	48	4,373	371
Surrey	3,766	219	70	4,287	597

Table 2 – Percentage Change from 2006/07 to 2007/08

	Overall Schools Budget %	ISB inc. pay progression grant %	Non delegated SEN Provision in Schools Budget %	Overall LEA budget %
Statistical Neighbours (Median)	6.1	5.3	8.6	2.0
Hertfordshire	6.0	5.0	41.4	-1.7
Bracknell Forest	6.6	5.2	23.9	2.0
Bedfordshire	6.4	6.0	1.3	3.4
Hampshire	6.0	4.8	11.9	5.9
Oxfordshire	6.1	5.3	9.0	-0.5
Cambridgeshire	5.3	5.0	4.0	3.2
West Berkshire	6.7	5.5	70.3	4.0
Buckinghamshire	5.8	5.8	8.6	8.6
Cheshire	3.3	2.7	8.0	-1.9
Trafford	6.2	7.4	-23.1	-2.2
Surrey	6.3	6.2	6.5	-1.4

Table 3– Additional Information Table

	DSG per pupil £	Increase in DSG per pupil %	Primary Schools on MFG %	Secondary Schools on MFG %	Special Schools MFG %	Central Expenditure from Schools Budget as a % of allowed limit	Planned Expenditure Devolved to schools %
Statistical Neighbours (Median)	3,704.32	6.4	33.3	10.7	8.0	102.4	89.0
Hertfordshire	3,730.25	6.4	23.1	7.3	8.0	129.8	89.9
Bracknell Forest	3,834.96	6.8	6.7	16.7	0.0	108.4	85.2
Bedfordshire	3,632.61	6.6	21.1	10.7	20.0	102.2	90.4
Hampshire	3,658.60	6.3	37.4	12.7	0.0	129.3	88.3
Oxfordshire	3,704.32	6.4	45.5	0.0	42.9	102.4	87.2
Cambridgeshire	3,622.90	6.3	16.2	3.2	0.0	100.2	89.9
West Berkshire	3,808.74	6.7	32.8	10.0	0.0	103.9	89.0
Buckinghamshire	3,728.01	6.3	40.8	73.5	38.5	98.3	85.9
Cheshire	3,692.33	6.4	40.9	34.1	100.0	101.8	89.0
Trafford	3,652.72	6.4	33.3	33.3	50.0	87.1	90.6
Surrey	3,800.87	6.5	35.6	7.5	0.0	102.7	88.7

Table 4 – Free Entitlement to Early Years

	Planned expenditure on early years £	Rate of funding for PVI settings £	Rate of funding for maintained nursery provision £
Statistical Neighbours (Median)	1,725	1,560	1,608
Hertfordshire	1,796	1,520	2,020
Bracknell Forest	1,706	1,560	1,575
Bedfordshire	1,581	No data	1,401
Hampshire	1,678	1,577	1,736
Oxfordshire	1,964	1,520	1,856
Cambridgeshire	1,645	1,511	1,378
West Berkshire	1,861	1,606	1,957
Buckinghamshire	1,752	1,518	1,559
Cheshire	1,733	1,596	1,608
Trafford	1,379	No data	974
Surrey	1,725	1,577	2,187

Table 5 – AWPU Ratios

	KS1	KS2	KS3	KS4
Hertfordshire	1.05	1.00	1.36	1.77
Bracknell Forest	0.98	1.00	1.20	1.45
Bedfordshire	1.03	1.00	1.23	1.60
Hampshire	1.02	1.00	1.26	1.54
Oxfordshire	1.07	1.00	1.29	1.69
Cambridgeshire	0.99	1.00	1.24	1.60
West Berkshire	1.03	1.00	1.34	1.53
Buckinghamshire	1.06	1.00	1.18	1.44
Cheshire	1.19	1.00	1.35	1.55
Trafford	1.10	1.00	1.39	1.79
Surrey	0.96	1.00	1.25	1.52