**Access Group (HCSS) Budget Modelling Software 2019**   **(March 2019 VERSION 1)**

**Additional Guidance Notes for Schools**

These guidance notes provide a little more information on how to set up and use the Bradford customised version of the Access Group (HCSS) Budget Modelling Software.

**This guidance sets out some important manual adjustments to funding that are required in setting up your scenarios for 2019. These are in line with the adjustments required in previous years.**

**This guidance also sets out how schools should move E03 – E07 staff contracts from the current to the new NJC national scale within the Software from April 2019. Schools need to take specific action in respect of this. Please see page 9.**

**We advise schools to read the more** [**general budget guidance**](https://bso.bradford.gov.uk/Secure/CMSPage.aspx?mid=236) **and the** [**S251 funding guidance**](https://bso.bradford.gov.uk/Secure/CMSPage.aspx?mid=229) **alongside these technical notes.**

Please contact a member of the HCSS Helpdesk with any technical queries that are not resolved by these guidance notes **0845 340 4546.** Schools should contact a member of School Funding Team with more general budget or formula funding related queries.

**Primary schools** should read sections **A**, **B**, **C**, **E and F** below

**Secondary schools** should read sections **A**, **B**, **E and F** below

**Nursery schools** should read section **A**, **C**, **E and F** below

**Special schools** and **PRUs** should read sections **A**, **D**, **E and F** below

**A. All Schools**

1. Once the 2019/20 financial year is ‘live’, the 2019/20 financial year will be the default view when you log in to the Software. The list of scenarios initially will be blank. You can either begin a new scenario or transfer an existing scenario from 2018/19.

You can create a blank scenario by clicking on the blue **‘+’**

To ‘transfer’ a scenario from 2018/19 click on ‘**Upgrade Scenario**’. You will be able to select a scenario from the drop-down list. Click on ‘**Submit**’ and you should see a pop-up message confirming the upgrade has been successful. Repeat this step for each scenario you wish to transfer.

You can choose from various actions under the Actions heading, at the right of each scenario line. To edit the scenario name, for example, you would choose Edit and then rename the scenario.

All transferred scenarios will still exist in the (closed) 2018/19 year. To change the financial year back to 2018/19, choose 2018-19 (CLOSED) from the top right drop-down menu.

1. To load your chosen scenario click on the scenario name in blue text. When your scenario has loaded you will be presented with a ‘Budget Dashboard’ screen. This displays a series of graphs depicting the data within the scenario. This can be printed by right clicking on the screen and choosing Print.
2. To access the data within your scenario, click on the **Scenario** heading on the left hand side. You will be presented with this screen:



The majority of the work you will undertake will be within the **Budget Planning** menu.

You can view a summary CFR report by selecting **View Budget Summary** from the Budget Summary menu.

You can navigate to different areas by clicking on the **Scenario** heading from any screen within your scenario.

**B. Primary and Secondary Schools**

1. Navigate to the **Pupil Numbers** page from the Scenario > Budget Planning heading menu, as illustrated above.

The October 2018 Census pupil numbers will be displayed (excluding 3&4 year old nursery numbers; so for nursery schools the Pupil Numbers page will be blank; it will also be blank for special schools and PRUs). Numbers for future years are partially pre-populated. **You need to manually input your estimate of Reception (primary) and Year 7 (secondary) numbers in each future year.** You may also wish to review pupil number estimates for future years in other year groups; amend by overtyping. You should ensure that pupil numbers for all year groups (reception to year 6 primary; year 7 to year 11 secondary) in all 5 years are populated. Sense check the pupil numbers totals shown at the bottom of the page.

**You must not change your October 2018 numbers** from those pre-populated. This will change your 2019/20 Section 251 funding. As your main 2019/20 Section 251 formula funding is now set and will not change, your software would be calculating a level of funding in 2019/20 that is not accurate and this will be a reason why your software does not match your Section 251 Budget Statement.

**Schools with DSPs and ARCs:** a reminder that the adjustment to pupil numbers / AWPU funding, that was needed prior to 2018 to remove those pupils funded on a place-led basis, is still no longer necessary. You should not reduce your pupil numbers or AWPU funding in any year for this reason.

1. See section C below for guidance on altering / inputting **early years 2, 3&4 year old nursery numbers**. You may wish to add your 3&4 year old numbers into the Pupil Numbers page. However, this is not necessary and will not have an impact on the funding calculations (EYSFF allocations are calculated within the Section 251 page). The Year 12 and Year 13 numbers in the Pupil Numbers page also do not link to any funding calculations.
2. Navigate to the **Section 251** page using the Scenario heading menu.

Your I01, I02 and I03 funding will be displayed by factor. The figures in the 2019/20 column should ultimately match the figures shown on your 2019/20 Section 251 Budget Statement published on 22 February by factor and **you must check this.**

You can drill down into each factor by choosing ‘Edit’ or ‘Show Factors’ from the drop-down box under Actions at the right hand side of the page:

* *Clicking ‘Edit’ allows you to change the funding value, which is recommended for adjusting I03 funding.*
* *Clicking ‘Show Factors’ will allow you to view the data behind the funding calculations. If you forecast, for example, that your Ever 6 FSM% will change in future years, you could adjust the % here. However, if you do this, please be careful to ensure that changes to data are realistic, especially increases, as if these changes do not materialise in future October Censuses you could be overestimating your funding. Schools are generally advised not to amend any of the data behind the primary and secondary formula funding calculations and certainly not to amend to increase funding allocations in future years.*

Please note that, as in previous years, the Software does not pre-populate from the Section 251 Budget Statements **Pupil Premium** (I05) and **Post-16 ESFA Bursary** funding (I02). You will need to enter these allocations manually in the relevant **Non-Section 251 Income** pages.

We recommend that schools **calculate their own estimate of Pupil Premium funding for 2019/20** using their pupil data from Key To Success alongside their January 2019 Census return. This is because the S251 estimate is calculated using the previous years Ever 6 FSM % data. Please ensure that your scenario includes an estimate of Pupil Premium funding in every year, based on the information you have available at the moment. Please note however, that *the Government has currently committed to continue Pupil Premium funding only until the end of 2019/20 and this is one of the uncertainties of the system going forward. Please refer to our budgeting guidance notes.*

Estimated **2 year old EYSFF allocations** (I01) are now pre-populated from the 1st Draft Indicative Budgets albeit simply within the EYSFF total in the Section 251 page. You can see a breakdown of the EYSFF calculations via the ‘Show Factors’ sub-menu on the EYSFF line. 2 year old allocations are included as an annual cash amount at the bottom of the ‘Show Factors’ page. This value can be edited and will feed through to the Section 251 page funding totals.

**Secondary schools with DSPs and ARCs that have post 16 places will need to manually move** in the Software the element of place-led funding for post 16 places from I01 to I02 so that the CFR totals match the Section 251 Budget Statements. Post 16 places are worth £6,000. So the place-led funding (no. of places x £6,000) should be removed from I01 funding (enter a negative) and added to I02 funding (enter a positive) in the relevant I01 and I02 Non-Section 251 Income pages.

1. You are reminded that you need to **manually enter into the Software as expenditure your school’s contributions to de-delegated items**. You should enter the figures as shown in the CFR Funding Breakdown of your S251 Budget Statement for 2019/20. To enter these figures:
	1. Navigate to the **Other Expenditure** page using the Scenario heading menu as before.
	2. You can then either click on the blue ‘**+**’ button to add the item as a new budget line, or amend the figure brought into 2019/20 from your 2018/19 scenario
	3. Choose the relevant CFR code by clicking in the Section box and choosing from the drop-down menu.
	4. Enter a relevant description along with the expenditure values and any further information helpful to you in your budget setting. *Once you enter a figure for 2019/20, the figures for 2020/21 – 2023/24 will be automatically generated based on 3% inflation in each year. You can overtype these figures to match 2019/20 (assuming no inflation), or keep the inflated figures, should you wish.*
	5. Click on the blue ‘Save’ button at the bottom right of the page.
2. Once you have completed these initial adjustments and inputs, please **check** your totals of formula funding and de-delegated funds expenditure in the **CFR Report** for 2019/20. You can navigate to your CFR report by clicking the Scenario heading menu and choosing **Reporting Module** from the Reports submenu. Click on the CFR report under the Bradford Reports tab and click on the blue ‘Print to Excel’ button; you should then be asked to open or save the report in Excel.

If you have simply tried to replicate your Section 251 Budget Statement and have not deliberately and knowingly made any changes e.g. for I03 SEND funding, or to use different estimates for I05 Pupil Premium, I01 Early Years, I02 Post-16 funding, then the funding totals by CFR code for 2019/20 in the CFR Report should match the totals shown on your 2019/20 Section 251 Budget Statement that was published on 22 February.

There will be a difference between the Software and the March Section 251 Statements for primary and nursery schools where schools have asked us to adjust their estimates of 2, 3&4 year old nursery numbers following the publication of the 1st Draft Indicative EYSFF allocations – please see paragraph C for how to manage these. There may also be some small differences that are due to roundings in the Software. If this is this case, please make small manual adjustments as necessary in the relevant **Non Section 251 Income** pages.

1. Once you are clear about your ‘starting’ funding position you should then enter **additional funding allocations** that you estimate / expect to receive for items that have not been included in the 2019/20 Section 251 Budget Statements. These should all be entered in the relevant Non-Section 251 Income pages. Please see the [S251 guidance notes](https://bso.bradford.gov.uk/Secure/CMSPage.aspx?mid=229) on BSO for further information on what is not included in the Section 251 Budget Statements. You should also take note of the risks and changes to funding that are highlighted in these guidance notes.

**C. Funding for Nursery Provision (EYSFF) – Nursery Schools & Classes in Primary Schools**

1. The Software has been pre-populated to include, at a detailed level, the Early Years Single Funding Formula (EYSFF) totals and estimated numbers, for 3 and 4-year-old free entitlement delivery that were shown in the 1st Draft Indicative EYSFF Budgets published on 22 February.

Please note that the pre-population of the 2 year old EYSFF funding is still treated simply; pre-populated only with an annual cash amount within the ‘Show Factor’ page on the EYSFF line of the Section 251 Page. In a change from 2018, 2 year old allocations are now pre-populated for nursery schools.

Please note that, where schools have asked for estimates of 3&4 year old numbers to be adjusted for 2019/20 following the publication of the 1st Draft Indicative Budgets, although these changes will be reflected in the Confirmed Indicative Budgets (published mid-March), they are not reflected in the Software. Schools that have adjusted their estimates will need to manually adjust their scenarios to match the CIBs using the process described below. Any adjustments to the cash values of 2 year old allocations resulting from numbers changes will also not be reflected in the Software.

Please also note, in a change from 2018, that the headcounts pre-populated in the ‘Show Factors’ page for 3&4 year olds are now split between the universal and extended entitlements. For both the universal and extended entitlements 1 headcount = 15 hours. In this way, the Software now replicates how the EYSFF allocations are displayed within the EYSFF breakdown in the Section 251 Budget files and also how the ready reckoner works.

Schools are advised always to sense check their HCSS Software estimates with the ready reckoner that is provided - do you get the same funding result when you use the same estimates of numbers and is this funding in line with what you would expect / manually calculate / currently receive? There is opportunity for error when making amendments. A simple sense check of the EYSFF funding totals in the Software against the ready reckoner will help ensure that significant errors are avoided.

Schools should not amend the number of hours (15) or the weeks per term (12,14,12) that are pre-populated in the ‘Show Factors’ page in any of the years.

Please note that the sustainability lump sum for nursery schools is not dynamic i.e. it does not re-calculate for changes in numbers. Nursery schools should just watch for this and should use the ready reckoner to forecast the impact of numbers changes on this value. This is not a significant issue unless estimated numbers in 2019/20 and in future years are significantly different from 1st Draft Indicative Budget estimates.

1. A school’s early years funding will be adjusted during 2019/20 to take account of the difference between estimated and actual numbers of funded hours counted in the termly censuses in May 2019, October 2019 and January 2020. You can alter EYSFF funding in the Software throughout the year if you wish (once you know the actual numbers of eligible children in the termly censuses for example) by using the process described in step 13 below.
2. By default, the Software assumes the same termly hours and the same level of basic funding as 2019/20 for the 4 remaining years of the 5 year forecast. You can alter EYSFF funding estimates for future years using the process described in the next step.

Our general advice is that schools should also not amend their pre-populated EYSFF hourly rates of funding in future years at this stage. We are talking directly with maintained nursery schools about future funding. We also have signalled that a fuller review of our EYSFF is required for April 2020, which may affect funding rates (including deprivation funding rates). There is a significant amount of uncertainty about April 2020 onwards. However, we suggest that primary schools with nursery classes assume a cash flat rates position at this time.

1. Navigate to the **Section 251** page by clicking on the **Scenario** heading on the left hand side. Scroll down to the Early Years Funding section and you will see your total EYSFF in a separate line. Nursery schools will also see the Sustainability factor as a lump sum.
	1. Scroll down and choose ‘Show Factors’ from the Actions drop down box at the right hand side of the **EYSFF Funding** factor line.
	2. Overtype the headcount numbers by term to reflect either your actuals or your revised estimates in the relevant columns and rows. To do this, choose ‘Edit’ from the Actions drop down box at the right hand side of each row and then overtype the termly headcount figure as necessary. Click the Save button for each row once you have made changes. Once you have entered all adjustments, click to close the screen. The Software will then recalculate the EYSFF funding total for 3 and 4 year olds in the Section 251 page. You should sense check the totals for each year.
	3. Overtype the cash value of 2 year old funding as necessary using the same edit process.
	4. For monitoring and recording changes in EYSFF funding during 2019/20, in all cases, we advise schools to use the Ready Reckoner to re-calculate estimates of funding allocations during 2019/20 and to sense check the results. The EYSFF ready reckoner will be published late March and will be available on [BSO here](https://bso.bradford.gov.uk/Secure/CMSPage.aspx?mid=1904).
	5. As an alternative to the process described in a. b. and c. above, it is possible for a school to leave the Section 251 Page alone and simply to add the funding adjustment shown in the ready reckoner into their I01 funding by entering a value in the **Non-Section 251 Income** page. To enter the funding values:
		1. Navigate to the **Non-Section 251 Income** page by clicking on the **Scenario** heading on the left hand side
		2. Click on the blue ‘**+**’ at the top of the page.
		3. Choose I01 from the Section dropdown list and enter a relevant description along with the necessary funding adjustment and any further information.
	6. For forecasting early years funding for future years, again, schools can adjust the termly headcounts by drilling down in the Section 251 page as described above, or by using the ready reckoner to calculate an estimated adjustment and manually entering this in to the Non-Section 251 Income I01 page in future years.
2. **Nursery schools**, before making any changes, should check that the formula funding totals in their HCSS CFR Report for 2019/20 match the total of EYSFF for 3 and 4 year olds shown in their 1st Draft Indicative EYSFF Budgets, published on 22 February. You can navigate to your CFR report by clicking the Scenario heading menu and choosing **Reporting Module** from the Reports submenu. Click on the CFR report under the Bradford Reports tab and click on the blue ‘Print to Excel’ button; you should then be asked to open or save the report in Excel. As a reminder, where a nursery school has requested adjustments to estimated numbers for their Confirmed Indicative EYSFF Budgets, these adjustments will not be included and the numbers and 2 year old cash allocations in the Software will need to be manually adjusted to match.

**D. Special Schools and Pupil Referral Units**

1. The funding sections in the Software for Special Schools and PRUs are blank. This is because of the timing of publication of the first High Needs Monthly Funding Statements for 2019/20. You should initially construct your budget in HCSS with reference to the [High Needs Monthly Funding Statements](https://bso.bradford.gov.uk/Secure/CMSPage.aspx?mid=3225) that are published on Bradford Schools Online on a monthly basis. A summary statement showing the 2019/20 Delegated Budget Shares for stand-alone High Needs providers was added to the [High Needs Funding Statements page](https://bso.bradford.gov.uk/Secure/CMSPage.aspx?mid=3225) on 22 February and the first Monthly Adjustment Statement will be available mid-April. A ready reckoner for 2019/20 will also be made available for schools to use to estimate their funding allocations throughout the year (available via the link above).
2. You will need to manually enter your estimated budget information using the **Non-Section 251 Income** page. To enter the funding values:
	1. Navigate to the **Non-Section 251 Income** page by clicking on the **Scenario** heading on the left hand side
	2. Click on the blue ‘**+**’ at the top of the page.
	3. Choose the relevant CFR code from the **Section** dropdown list:
		1. I01 funding = Place funding for pre-16 pupils
		2. I02 funding = Place funding for post-16 pupils
		3. I03 funding = Plus elements of funding for all pupils
		4. I05 funding = Estimated Pupil Premium funding
	4. Enter a relevant description along with the funding values and any further information.
3. Once you have initially entered your first draft of funding for 2019/20 you should sense check that the Place-Plus totals shown in your CFR Report in your HCSS scenario are as you would expect. You can navigate to your CFR report by clicking the Scenario heading menu and choosing **Reporting Module** from the Reports submenu. Click on the CFR report under the Bradford Reports tab and click on the blue ‘Print to Excel’ button; you should then be asked to open or save the report in Excel.
4. The ‘**Plus’ elements** **(I03)** of funding will change during 2019/20 according to the population of pupils recorded on the roll of the school at the 10th of each month. You should therefore, adjust your budget on a monthly basis in HCSS to reflect any subsequent changes in I03 funding. You should also check for changes to any of the other funding elements that these statements may identify*.* The High Needs Funding Statements will be updated and published on [this page](https://bso.bradford.gov.uk/Secure/CMSPage.aspx?mid=3225) on BSO.
5. **For Future Years**: The Software assumes no changes in per pupil / place funding values in future years and we would suggest that schools work on the same factor values as for 2019/20. You will be able to use the ready reckoner (click [here](https://bso.bradford.gov.uk/Secure/CMSPage.aspx?mid=3225) to access this on BSO) to estimate adjusted funding for 2019/20 as well as for future years on this basis.

**E. Primary & Secondary Formula Funding – Additional Assumptions**

1. **I01 funding**
2. The Software is set up to assume that primary and secondary formula funding from April 2020 will continue to be constructed as it has been in 2019/20 – using National Funding Formula and the 2019/20 formula variables and data for individual schools (FSM, EAL etc). Schools are advised not to alter the data behind their Section 251 formula funding calculations e.g. FSM% and certainly not to alter this with the purpose of increasing formula allocations in future years as these increases may not be secure.
3. The Software assumes that the **Minimum Funding Guarantee** (MFG) continues at 0% per pupil in 2020/21 onwards. This is a dynamic formula, which will take account of changes in pupil number estimates.
4. The Software assumes that all schools will continue to be off the **Transitional Ceiling** (all values in 2020/21 onwards are £0).

1. The Software assumes that the current cash values of the **Per Pupil Minimum** factor (£3,500 primary; £4,800 secondary) repeat unchanged in 2020/21 onwards. The actual cash allocations from April 2020 will change for pupil numbers and other data. However, this will not be an issue unless pupil numbers have been very significantly changed or the data that has been used to calculate formula funding has been manually altered by the school within the Software (see the warning in paragraph a. above). Schools are advised to leave this factor unchanged.
2. Funding for **expanding schools** and for **bulge classes,** as well as for **safeguarded salaries,** is pre-populated to match S251 Budget Statements for 2019/20 only. Applicable schools need to review whether this funding will continue from April 2020 and manually adjust funding either by drilling down in the Section 251 page or by adding a new budget line in the Non Section 251 Income page, where it is appropriate to do so.
3. The value of funding for the **BSF affordability gap (PFI funding)** is pre-populated from the 2019/20 value across all 5 years. We would expect this to increase in line with inflation. However, this will not have an impact on the net budget of the school and therefore, for simplicity, we suggest that this is kept at the 2019/20 value. **This funding is not physically allocated to schools and BSF schools should either remove this from their I01 funding for budgeting purposes, or add a corresponding value of expenditure into E28**.
4. **I02 Post-16 ESFA funding**
5. I02 **ESFA Main Programme funding** for 2019/20 is pre-populated to match the estimate in your Section 251 Budget Statement.
6. The estimated **ESFA Post-16 Bursary** funding shown in Section 251 Budget Statements is not pre-populated and you will need to enter this funding manually into the Non-Section 251 Income page of the Software.
7. The total I02 funding shown in the CFR breakdown in your Section 251 Budget Statement does include the post 16 element of the **High Needs Place** funding. However, this is not pre-populated in the Software under I02, it is in I01, and so you will need to move this funding manually into I02 funding in the Non-Section 251 Income page. A corresponding adjustment to remove this funding from I01 is needed.
8. We expect that the ESFA will notify the Authority of final allocations for 2019/20 by the end of March and therefore, any adjustment to funding will be shown on the Advances Schedule for this in April. Schools will need to manually adjust their allocations in the Software following this confirmation.
9. The Software assumes the continuation of Post-16 funding in future years at the same cash value as 2019/20. The software does not automatically re-calculate I02 allocations where schools change their post 16 pupil numbers in the Pupil Numbers page. This leaves schools to make their own estimates of funding, using their own predictions of student number, funded growth and retention rates.
10. **I03 funding (SEND)**
11. I03 funding for primary and secondary schools is pre-populated to match the 2019/20 Section 251 Budget Statements. This reflects the funding position recorded in February 2019. I03 funding figures will change on a monthly basis, from April, to reflect the movement of pupils on roll with EHCPs. Schools can estimate their own I03 funding by taking into account any known leavers or starters throughout the financial year. Schools should therefore, adjust their budgets on a monthly basis in the Software to reflect any changes in I03 funding. Schools should also check for changes to any of the other funding elements. The [High Needs Funding Statements](https://bso.bradford.gov.uk/Secure/CMSPage.aspx?mid=3225) and the main [Advances Schedules](https://bso.bradford.gov.uk/Secure/CMSPage.aspx?mid=312), which show these funding adjustments, will be updated and published on BSO. It is reasonable for schools, in the absence of any further more specific information, to assume the same value of I03 funding in future years as in 2019/20, provided that the specific expenditure associated with their current number of children with EHCPs is also included on the same basis.
12. **I05 Pupil Premium funding**
13. Schools need to manually input their estimated I05 Pupil Premium allocations into the Non-Section 251 Income page.
14. The value of Pupil Premium funding in future years, where this grant continues, will be mostly influenced by a) the number of children on roll in the January Censuses who have registered for free school meals at any stage in the last 6 years and b) the value of funding per pupil, which will be set by the Government. It is reasonable for schools to estimate at this stage the continuation of this grant in future years using the same unit values. Please note however, that *the Government has currently committed to continue Pupil Premium funding only until the end of 2019/20 and this is one of the uncertainties of the system going forward. Please refer to our budgeting guidance notes.*
15. Schools can also enter into their scenarios expected allocations for children who are Looked After. This will be paid in 2019/20 retrospectively on a termly basis.
16. The [S251 guidance notes](https://bso.bradford.gov.uk/Secure/CMSPage.aspx?mid=229) give further information on Pupil Premium funding.

**F. Teacher and Support Staff Pay Assumptions**

1. The Software has been set up on the default pay scales and other inflation assumptions listed below. A number of these are somewhat estimated at this time. Schools are advised to fully read the Authority’s budget setting guidance notes for the warnings given about expenditure pressures, uncertainties and actions to take during and after budget setting for 2019/20. Schools must regularly check the status of key decisions and must regularly review the impact of these on planned spending.

Schools will be aware that they can amend the inflation and pay related factors assumptions, and the values of pay scales, in their software. Schools should seek further guidance from the HCSS helpdesk if they are unclear about how to do this. School Funding Team will ask for the Software to be updated to take account of significant changes and confirmations that apply to all schools where required during the year e.g. the September 2019 teacher pay award.

The table below shows the default ‘Pay Related Factors’ that have been pre-populated within the 2019 Software. The table in your software should exactly match this. **You must double check this.**

Unlike in 2018, where we asked schools to manually adjust the teacher pension contribution rate, there are no manual adjustments to the pay-factors required in the Software at this stage, provided that your table in your scenario matches this:



* 1. **Teachers Pay** **Award E01:** the Software assumes by default a blanket 2% uplift applied at September 2019 on all points, across all scales and allowances. All points, scales and allowances are then uplifted again by 2% each September in future years.

The 2018 Teachers Pay & Conditions document is available for reference [here](https://www.gov.uk/government/publications/school-teachers-pay-and-conditions).

Schools are advised that the **‘Leading Practitioners’** pay-scale has now been added into the Software. The AST and Excellent Teacher scales are redundant but have not been deleted as we are not clear about the extent to which school may still use these in their scenario modelling.

Schools are reminded on a specific point, that in Bradford, teachers move from scale point 5 directly to point 6b, bypassing scale point 6. The automatic incremental rise within the Software will not account for this. Please read the guidance notes on the[HCSS page](https://bso.bradford.gov.uk/Schools/CMSPage.aspx?mid=199) on BSO on how to edit those contracts showing as scale point 6 instead of scale point 6b. If you have specific questions on terms and conditions or specific teacher contracts within your school please contact your HR officer.

* 1. **Teacher Pension Scheme Contribution E01:** the Software by default now includes an increase in the employer’s contribution to teacher’s pensions at September 2019 from 16.48% to **23.68% \*.** Further guidance on how schools should bring in I01 grant income to offset this increase is included in our budget notes.

*\* Please be aware we have previously advised on an indicative figure of 23.60%. This has been amended to 23.68% to incorporate the ‘administrative levy’, which has now been added to the figure (and was not previously e.g. in the DfE’s consultation). Corroboration of the 23.68% can be found on this webpage:*

<https://www.teacherspensions.co.uk/news/employers/2019/02/valuation-of-the-teachers-pension-scheme.aspx>

* 1. **Support Staff Pay E03 – E07:** Schools are advised that they are required to **manually adjust in their software E03 – E07 contracts brought forward from existing scenarios to transfer these onto the new NJC pay scale at April 2019.**

**The 2019 Software includes a new pay-scale entitled ‘New NJC scale April 2019’.** Schools can see this is the ‘Pay Scale’ menu. The Software does continue to contain the existing pre April 2019 scale, which is entitled ‘NJC’. This ‘NJC’ scale is the same as is set up in the current 2018 Software.

All new E03 – E07 staff and contracts from April 2019 should be placed onto the ‘new NJC scale April 2019’. Schools should ignore the existing ‘NJC’ scale for new staff.

Schools importing scenarios, after these have been saved into 2019, will need to manually transfer their existing staff from the ‘NJC’ to the ‘New NJC scale April 2019’. This will need to be done at individual staff contract level, and schools should cross check their input against the assimilation results for each member of staff as advised by your HR support. Guidance on how to action this transfer of scales in the Software is provided by HCSS here:



We have chosen to add a new scale, rather than to overtype the existing scale (which would still require manual adjustment by schools of existing staff scale points), on the advice of HCSS and because we feel this will reduce confusion and other potential process issues in the importing of existing scenarios. We feel that this will provide a cleaner start to the new scale. Retaining the existing scale, which does map in part to the new, rather than over-typing it, allows schools to import their scenarios so that these initially come into the 2019 Software on the same basis as they existed in 2018 with schools then able to deliberately amend and cross check as they do this. \*

*\* Within the 2018 Software, we kept the existing SCP framework for the full 5 year period but ‘back-referenced’ the values of points under the new national scale onto the existing scale. For example, current SCP 18 under the new scale becomes SCP 7 at April 2019. The value of SCP 7 at April 2019 is £19,554. We therefore, adjusted the value of SCP 18 at April 2019 to be £19,554. On this basis, for the purposes of constructing their budget forecasts at this time, schools would assume that support staff will continue to progress on the existing SCP framework.*

We indicated in last year’s guidance that HCSS was investigating the possibility of avoiding manual intervention through the development of an automated mapping process. HCSS has advised that the complexity of the mapping and the variation in results and scales across different authorities means that development of this hasn’t been possible.

For future years, the Software assumes that all points on the new NJC scale will increase by 2% a year from April 2020. Further guidance on the uncertainties of this increase is given in our budget notes.

The pay award and new NJC scale incorporates the increase in the national living wage and also supersedes the specific Bradford living wage, so no additional adjustments are needed for these factors when using this scale.

* 1. **Local Government (West Yorkshire) Pension Scheme**: the Software assumes that the employer’s contribution to the local government pension scheme will increase from 17.5% to 20.0% from April 2020. Further guidance on the expected timescale for the confirmation of change at April 2020 is given in our budget notes.
	2. **Inflation** – the Software assumes that prices for goods and services will increase by 3% annually at April each year.

**G. Additional Notes and Feedback from Schools**

1. Please note that School Funding Team is able to access the data for Bradford schools directly online but will only do so if this is requested by the school and with the school’s permission. Only School Funding Team has access rights within the Local Authority. Routine checks of the Software at individual school level are not carried out by SFT. SFT will only access the scenarios for an individual school where the school has requested and authorised SFT to do so.

**H. Contact Details**

1. Schools should contact **HCSS Customer Support** for guidance with technical issues or general user advice, such as how to enter staffing adjustments into the Software. **Please call HCSS directly on 0845 340 4546.**
2. Schools should contact a member of School Funding Team with any more general budget or formula funding related queries.

**Appendix 1 – Bradford Support Staffing: Term Time Only Factors**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Actual**  | **Weeks** | **Under 5** | **Over 5** | **Under 5** | **Over 5** | **Under 5** | **Over 5** |
|  | **days**  |  | **Years** | **Years** | **Years** | **Years** | **Years** | **Years** |
|  | **worked p.a** |  | **scale 1-4** | **scale 1-4** | **scale 5-6** | **scale 5-6** | **scale SO1-PO6** | **scale SO1-PO6** |
|  |  |  | (pt 4-21) | (pt 4-21) | (pt 22-28) | (pt 22-28) | (pt 29 & over) | (pt 29 & over) |
| **TERM TIME** | 190 | 38 | 0.831 | 0.849 | 0.838 | 0.849 | 0.846 | 0.857 |
| **TERM TIME + 1 WK** | 195 | 39 | 0.853 | 0.872 | 0.860 | 0.872 | 0.868 | 0.880 |
| **TERM TIME + 2 WK** | 200 | 40 | 0.874 | 0.894 | 0.882 | 0.894 | 0.890 | 0.902 |
| **TERM TIME + 3 WK** | 205 | 41 | 0.896 | 0.916 | 0.904 | 0.916 | 0.912 | 0.925 |
| **TERM TIME + 4 WK** | 210 | 42 | 0.918 | 0.939 | 0.926 | 0.939 | 0.935 | 0.947 |