**HCSS Budget Modelling Software – HCSS Budgeting 2017**   **(March 2017 VERSION 1)**

**Additional Guidance Notes for Schools - Funding**

These guidance notes provide a little more information on how to set up and use the Bradford customised version of the HCSS Budget Modelling Software and to point out some specific details on funding forecasts that will aid users.

Please contact a member of the HCSS Helpdesk with any technical queries that are not resolved by these guidance notes (see section H below).

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

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

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

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

**A. All Schools – Please Read**

1. Once the 2017/18 financial year is ‘live’ in the Software, the system will automatically default to the 2017/18 financial year when you log in. In 2017/18 the list of scenarios will be blank. To ‘transfer’ a scenario from 2016/17 click on ‘**Upgrade Scenario**’ (you need to be in 2017/18 to do this). You will then 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 want to transfer into 2017/18. All transferred scenarios will still exist in the (closed) 2016/17 year.



*Alternatively, you can create a blank scenario by clicking on the blue ‘+’.*

To change the financial year back to 2016/17, choose 2016-17 (CLOSED) from the top right drop-down menu.



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.

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.

1. To access the data within your scenario, click on the **Scenario** heading on the left hand side. You will be presented with the screen below:



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 – Please Read**

1. Navigate to the **Pupil Numbers** page (Budget Planning submenu) using the Scenario heading menu, as above.

The October 2016 Census pupil numbers will be displayed and numbers for future years are partly pre-populated. You will need to manually input your estimate of Reception and Year 7 numbers in each future year. You can also adjust pupil numbers for other year groups where necessary. You should ensure that pupil numbers for all years, including Reception and Year 7 intakes, for October 2017 onwards are populated and match your forecasts

**You must not change your October 2016 numbers** in the Pupil Numbers page from what is pre-populated. If you do, this will change your 2017/18 Section 251 funding. As your main 2017/18 Section 251 funding is now set and will not change, your software would then be calculating a level of funding in 2017/18 that is not accurate.

***Schools with specialist resourced provisions (DSPs / ARCs):*** *The total of pupil numbers in the Pupil Numbers page includes the mainstream pupils that are counted in the school’s October 2016 Census PLUS pupils placed in resourced provisions (DSPs and ARCs) at the school, and funded via High Needs Places. Schools with these resourced units must be careful not to ‘double’ fund these children in future year funding forecasts. The funded pupil numbers used to calculate S251 funding in the software have been reduced by the relevant number of High Needs Places in 2017/18 (as an adjustment in the Section 251 page), to recognise that the school is already receiving £10,000 per place for these pupils and does not also receive formula funding on top of this. Schools with DSPs and ARCs need to manually adjust their pupil numbers at October 2017 onwards – reducing their numbers to remove those funded via High Needs Places- either in the Pupil Numbers page (by manually reducing numbers in each year by the number of funded High Needs Places) or by entering a pupil number adjustment in the Section 251 page – please see* ***Appendix 1*** *for guidance on how to do this.*

*Schools that do not have resourced provisions are unaffected by this and do not need to adjust their numbers in this way.*

***Other pupil number adjustments****: You may find that the total of your pupil numbers shown in the Pupil Numbers page of the software for October 2016 (taken from our local version of the data from the October 2016 Census) is higher than the total of funded numbers shown in your 2017/18 Section 251 Budget Statement. This difference is the result, in particular, of data cleansing at national level, which has removed children that are identified as being on the roll of more than one school. As stated in the budget guidance, the DfE provides the Authority with a dataset from the October 2016 Census, which the Authority must use, unchanged, to calculate 2017/18 formula funding allocations.*

1. See section C below for guidance on altering **Early Years numbers** for each term.
2. Navigate to the **Section 251** page using the Scenario heading menu as before.

Your I01, I02 and I03 funding will be displayed per factor, and should match the figures shown on your 2017/18 Section 251 Budget Statement. The estimated allocations for Pupil Premium (I05), 2-year-old nursery funding (I01) and for Post-16 EFA Bursary (I02) are not included in the Section 251 Budget page of HCSS, so you will need to enter these allocations manually in the Non-Section 251 Income page (see step 8. below). Schools with specialist resourced provisions (DSPs) with 6th form places will also need to move the element of funding corresponding to the high needs funding for 6th form places from I01 to I02 in the software, so that the CFR totals match those shown if your Section 251 Budget Statement (see step 9. below). *Please note that some figures may be slightly different due to roundings within the software.*

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 or nursery funding (see section C below).*
* *Clicking ‘Show Factors’ will allow you to adjust the data behind the funding calculations e.g. if you forecast that your Ever 6 FSM% will increase in future years, you could adjust the % here. Please be careful to ensure that changes to data are realistic, as if these changes do not materialise in future October Censuses you could be overestimating your funding.*
1. You will notice that no CFR expenditure codes are included in this Section 251 page. You are reminded that **you will need to manually enter into the software your school’s contributions to the de-delegated and contingency items.** You should enter the same figures as shown in the CFR Funding Breakdown of your S251 Budget Statement for 2017/18.

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 2017/18 from your 2016/17 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 2017/18, the figures for 2018/19 – 2021/22 will be automatically generated based on 2% inflation in each year. You can overtype these figures to match 2017/18 (assuming no inflation), or keep the inflated figures, should you wish. Please refer to the* [*budget guidance notes*](https://bso.bradford.gov.uk/Secure/SecureArea_FCK_Uploads/files/S251%20Budgets%202017-18%20Primary%20and%20Secondary%20Guidance%20Notes.docx) *for further information on de-delegated funding.*
	5. Click on the blue ‘Save’ button at the bottom right of the page.
1. You must then manually enter your estimated **I05 Pupil Premium, I01 2-year-old funding, and I02 Post-16 Bursary** allocations for 2017/18 and future years in the **Non-Section 251 Income** page. The estimated allocations for schools shown in the Section 251 Budgets Statements for 2017/18 for these items are not pre-populated in the software. Please see the [budget guidance notes](https://bso.bradford.gov.uk/Secure/SecureArea_FCK_Uploads/files/S251%20Budgets%202017-18%20Primary%20and%20Secondary%20Guidance%20Notes.docx), which explain how the estimates of Pupil Premium shown in your 2017/18 Section 251 Budget Statement have been calculated. We strongly recommend that schools calculate their own estimate of Pupil Premium funding for 2017/18 using their pupil data from Key To Success alongside their January 2017 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. *The Government has committed to continue Pupil Premium funding until (at least) the end of this current Parliament (2019/20), but you should include the funding in all available years in the software.*
2. Secondary chools with specialist resourced provisions (DSPs) with 6th form places will need to move the element of funding corresponding to the **high needs funding for 6th form places** from I01 to I02 funding in the software, so that the CFR totals match those shown if your Section 251 Budget Statement. High needs funding for 6th form places is set at £11,000 per place in 2017/18. The funding should be removed from I01 funding and added to I02 funding in the **Non-Section 251 Income** page.
3. Please then **check** your totals of formula funding in the CFR Report in your HCSS scenario for 2017/18. 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. 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 SEN 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 2017/18 in the CFR Report should match the totals shown on your 2017/18 Section 251 Budget Statement. There will be differences where schools have adjusted their estimates of nursery numbers following the publication of the 1st Draft Indicative EYSFF allocations – please see below for how to manage these. There may also be some small differences that are due to rounding that could result in the total 2017/18 funding in HCSS being slightly different from the funding shown on your S251 Budget Statement. If this is this case, please make minor manual adjustments in the relevant **Non Section 251 Income** pages.
5. You should then enter **additional funding allocations** (whether estimated or known) for items that have not been included in the 2017/18 Section 251 Budget Statements. These should be entered in the Non-Section 251 Income pages. Please see the [budget guidance notes](https://bso.bradford.gov.uk/Secure/SecureArea_FCK_Uploads/files/S251%20Budgets%202017-18%20Primary%20and%20Secondary%20Guidance%20Notes.docx) 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 – Nursery Schools & Classes in Primary Schools**

1. The Software has been pre-populated to include the Early Years Single Funding Formula (EYSFF) totals for 3 and 4-year-old funding that are shown in the 1st Draft Indicative EYSFF Budgets published on 24 February 2017. Please note that, where schools have asked for estimates of numbers to be adjusted for 2017/18 following the publication of these, although these changes will be reflected in the Confirmed Indicative Budgets to be published mid-March, these changes are not reflected in the software. Schools that have adjusted their estimates will need to manually adjust their scenarios, using the process described below, to ensure that EYSFF figures in HCSS match the Confirmed Indicative Budgets that will be published mid-March.
2. A school’s nursery funding will be adjusted during 2017/18, to take account of the difference between estimated and actual numbers of funded hours counted in the termly censuses in May 2017, October 2017 and January 2018. *You can alter EYSFF funding throughout the year (once you know the actual numbers of eligible children in the termly censuses for example) by using the process described in step 15 below.*
3. The software assumes the same termly hours and the same level of basic funding for the remaining years of the 5 year forecast. *You can alter EYSFF funding for future years using the process described in the next step.*
4. 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. The Software allows schools to adjust their forecasts of funded hours for each term in 2017/18, and in future years as follows:
	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. You can then adjust, if you wish, the termly headcount figures in the rows for your changes in estimates or for actuals when these are known e.g. for the summer term, you should adjust the part-time headcount as would be recorded in the May 2017 Census in the row ‘P/T Headcount Summer’. 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.
	3. For 2017/18 funding tracking, in all cases, we advise schools to use the Ready Reckoner to re-calculate estimates of funding allocations during 2017/18. 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). As an alternative to the process described in a. and b. above, it is possible for a school 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.
	4. You should use the process in c. above to enter funding estimates for **2-year-old nursery funding**.
	5. In forecasting nursery 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.
5. **Nursery schools** specifically, before making any further changes, should check that the formula funding totals in their HCSS CFR Report for 2017/18 match the total of EYSFF for 3 and 4 year olds shown in their 1st Draft Indicative EYSFF Budgets, published on 24 February 2017. 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.
6. Where a nursery school has then requested an adjustment to estimated numbers for their Confirmed Indicative EYSFF Budgets, these adjustments will not be included in the pre-populated HCSS scenario. Schools should ensure they have adjusted their software to match their Confirmed Indicative Budgets, using the process described in step 15. above.

**D. Special Schools and Pupil Referral Units – Please Action**

1. The funding sections in the Software for Special Schools and PRUs have been left blank. This is because of the timing of publication of the first High Needs Monthly Funding Statements for 2017/18. 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 2017/18 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 24 February 2017 and the first Monthly Adjustment Statement will be available mid-April. A ready reckoner for 2017/18 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 2017/18 you should 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 then change during 2017/18 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 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, pending further information from the DfE, we would suggest that schools work on the same factor values as for 2017/18. 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 2017/18 as well as for future years.

**E. Local Authority Funding - 2017/18 and future years**

1. **I01 funding**
2. Formula funding for 2018/19 and beyond is based on the factor values in the proposed National Funding Formula (NFF), currently under consultation. We are expecting information to be made available later this year about the outcomes of the consultation and we will issue further guidance once the implications of this are known. *Please be aware that the full National Funding Formula is not currently replicated in the software and so an adjustment will need to be made in the Non-Section 251 Income page of HCSS (see step 24.c. below).*
3. The Software assumes the continuation of the **Transitional Ceiling** at the 2017/18 level of 0.00% and the **Minimum Funding Guarantee** (MFG) at minus 1.5% per pupil.
4. The Software does not include the **3% Floor Protection** funding or the **Area Cost Adjustment (ACA)** in the proposed NFF for 2018/19 and beyond. The Prior Attainment formula funding figure for 2018/19 and beyond is not currently calculating correctly in the software; this will be corrected and updated in the software as soon as possible. *Further guidance will be issued shortly for schools to address this.*
5. Funding for **expanding schools** and for **bulge classes** is pre-populated to match S251 Budget Statements for 2017/18 only. Applicable schools need to review whether this funding will continue from April 2018 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.
6. The value of funding for the **BSF affordability gap (PFI funding)** is pre-populated from the 2017/18 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 2017/18 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**.
7. **I02 Post-16 EFA funding**
8. I02 **EFA Main funding** for 2017/18 is pre-populated to match the estimate in your Section 251 Budget Statement.
9. The estimated **EFA Post-16 Bursary** funding shown in Section 251 Budget Statements is not pre-populated and so you will need to enter this funding manually into the Non-Section 251 Income page of the software.
10. The total I02 funding shown in the CFR breakdown in your Section 251 Budget Statement includes the 6th form element of the High Needs Place funding. This is not pre-populated and so you will need to enter this funding manually into I02 funding in the Non-Section 251 Income page of the software. As the total High Needs place funding is included in HCSS in I01 funding, a corresponding adjustment to remove this funding from I01 funding will be needed (see step 9. above).
11. We expect that the EFA will notify the Authority of final allocations for 2017/18 by mid-April and therefore, any adjustment to funding will be shown on the Advances Schedule for this either April or May.
12. The software assumes the continuation of Post-16 funding in future years at the same cash value as 2017/18. The software does not automatically re-calculate I02 allocations where schools change their 6th form pupil numbers in the Pupil Numbers page. This leaves schools to make their own estimates of funding, using their own predictions of funded growth and retention rates.
13. **I03 funding (SEN)**
14. I03 funding for primary and secondary schools is pre-populated to match the 2017/18 Section 251 Budget Statements. This reflects the funding position counted in February 2017. I03 funding figures will change on a monthly basis, from April, to reflect the movement of pupils on roll with Statements. 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 HCSS 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 2017/18, provided that the specific expenditure associated with their current number of children with SEN Statements is also included on the same basis.
15. **I05 Pupil Premium funding**
16. As described above, schools must manually input their estimated I05 Pupil Premium allocations into the Non-Section 251 Income page.
17. The value of Pupil Premium funding in future years 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. The Government has committed to continue Pupil Premium funding until (at least) the end of this current Parliament (2019/20). It is reasonable, therefore, for schools to estimate at this stage the continuation of this grant in future years using the same unit values.
18. Schools can also enter into their scenarios expected allocations for for children who are Looked After. This will be paid in 2017/18 retrospectively on a termly basis at £466.67 per LAC per term (£1400 annually).

The [budget guidance notes](https://bso.bradford.gov.uk/Secure/SecureArea_FCK_Uploads/files/S251%20Budgets%202017-18%20Primary%20and%20Secondary%20Guidance%20Notes.docx) give further information on Pupil Premium funding (section 10).

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

1. The software has been set up on the basis of the following payscale assumptions for 2017/18 and beyond:
	1. **Teachers Pay** has been set up on the basis of 2016/17 confirmed payscales for the period April – August 2017, with 1% inflation applied from September 2017. The payscales have then been set up to inflate by 1% every September for the next 4 years. The 1% uplift has been applied to all teachers payscales in HCSS for September 2017 and beyond.

Please note that the Teachers Main Scale Point 6b was added during 2015/16 to reflect the 2% uplift that was applied to the maximum of the main pay range.

The 2016 Teachers Pay & Conditions document is available for reference [here](https://www.gov.uk/government/publications/school-teachers-pay-and-conditions-2016).

* 1. **Support Staff Pay** has been set up on the National Employers’ final offer, which was agreed in May 2016, as follows:
1. From 1 April 2016:
	* + On SCP 6, £900 (equivalent to 6.6%)
		+ On SCP 7, £900 (equivalent to 6.6%)
		+ On SCP 8, £900 (equivalent to 6.5%)
		+ On SCP 9, £900 (equivalent to 6.4%)
		+ On SCP 10, £900 (equivalent to 6.3%)
		+ On SCP 11, £300 (equivalent to 2.0%)
		+ On SCP 12, £300 (equivalent to 2.0%)
		+ On SCP 13, £250 (equivalent to 1.6%)
		+ On SCP 14, £250 (equivalent to 1.5%)
		+ On SCP 15, £200 (equivalent to 1.2%)
		+ On SCP 16, £200 (equivalent to 1.2%)
		+ On SCP 17, £175 (equivalent to 1.01%)
		+ On SCPs 18 and above, 1.0%
2. From 1 April 2017:
	* + On SCP 6, £500 (equivalent to 3.4%)
		+ On SCP 7, £500 (equivalent to 3.4%)
		+ On SCP 8, £475 (equivalent to 3.2%)
		+ On SCP 9, £400 (equivalent to 2.6%)
		+ On SCP 10, £375 (equivalent to 2.5%)
		+ On SCP 11, £300 (equivalent to 1.9%)
		+ On SCP 12, £300 (equivalent to 1.9%)
		+ On SCP 13, £300 (equivalent to 1.9%)
		+ On SCP 14, £300 (equivalent to 1.8%)
		+ On SCP 15, £300 (equivalent to 1.8%)
		+ On SCP 16, £250 (equivalent to 1.5%)
		+ On SCP 17, £225 (equivalent to 1.3%)
		+ On SCPs 18 and above, 1.0%
3. For April 2018 and beyond, we have applied a 1% uplift for all NJC scale points in the software. This is a general assumption which is subject to change. The Government has indicated the move to a National Living Wage of £9.00 per hour by April 2020, but there is some lack of clarity over the incremental process from April 2018 – April 2020, so the 1% uplift has been set up in the software as a reasonable starting position. *In order to afford the National Living Wage, it may mean that the higher SCPs do not increase by as much as 1%; the differential between spinal column points may decrease.*
4. We have not adjusted NJC scale points to account for **Bradford’s Living Wage**, so schools will need to continue to adjust for this where necessary.
5. Schools can choose to budget on the basis of the pay assumptions set up in the software for 2017/18 and future years. Alternatively, schools can amend the payscales for individual scale points if they wish.
6. The software will be updated with the latest teachers and support staff payscales once they have been confirmed at a national level.
7. HCSS plans to release an update to the staffing area of HCSS to enable schools to enter information relating to the **Apprenticeship Levy** from 2017/18. Schools will be notified when this is available and will be able to contact the HCSS Helpdesk for support.

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

1. Please note that School Funding Team (SFT) will be able to access the data for Bradford schools, but we will only do so if this is requested by the school. Only the School Funding Team have access rights within the Local Authority. **Routine checks of the Software will not be carried out. SFT will only access the data / scenarios for an individual school where the school has specifically requested and authorised SFT to do so** e.g. when a school has a specific concern about its scenario and asks for support.
2. As last year, we will shortly be asking for your feedback on the HCSS Budgeting software. We value your feedback so please look out for the HCSS Feedback questionnaire on BSO.

**H. Contact Details**

1. Schools should contact **HCSS Customer Support** for guidance with technical issues or general advice, such as how to enter staffing adjustments into the software. **Please call HCSS directly on 0845 340 4546**.
2. For specific budget related queries, or queries relating to formula funding shown in the software for 2018/19 and beyond, schools should contact Sarah North on 01274 434173 or by email to sarah.north@bradford.gov.uk.

**Appendix 1 - How to Enter a Pupil Number Adjustment in the Section 251 page (for schools with DSP/ARC units or possible duplicate pupils)**

Navigate to the **Section 251** page (Budget Planning submenu) by clicking on the Scenario heading menu.

Select ‘Show Factors’ from the Actions drop down list to the right of the AWPU - Primary, AWPU - Key Stage 3 or AWPU - Key Stage 4 factor lines The number of High Needs places (as per the regulations) that have been removed from the Reception - Year 6, Key Stage 3 or Key Stage 4 numbers will be displayed, where applicable.

You will see the High Needs places have already been accounted for in 2017/18 (as shown in the red circle below).



You can then enter an adjustment for 2018/19 onwards (where necessary) by choosing ‘Edit’ from the Actions drop down menu on the right. Section 251 formula funding for 2018/19 onwards will then update accordingly.

**Appendix 2 – 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 |