

Independent School Funding Review - *Appendix*

Prepared for the Government of Jersey

16 October 2020

Contents

1. Progress of review against objectives	3
2. Methodology of the Independent School Funding Review.....	9
2.1. Our approach.....	9
2.2. Options appraisal.....	10
2.3. Long-list options considered as part of this review	13
3. Governance and engagement.....	14
3.1. Governance and project plan	14
3.2. Engagement with stakeholders	14
3.3. Themes emerging from engagement	17
4. List of schools and colleges in scope of review	24
5. Proposed Implementation approach	25
6. Further detail on proposed new funding model	27
6.1. Assessment of the current state funding formula	27
6.2. Proposed new funding formula	28
7. Glossary	32

1. Progress of review against objectives

The Invitation to Tender (ITT) for this Independent School Funding Review was issued by GoJ in July 2019.¹ In Section 1.4 of the ITT document, the GoJ sets out the objectives for this review, covering 10 criteria. In the Section below, we show the 10 criteria set out in the Invitation to Tender documents, and detail of how each criterion has been met through this Independent School Funding Review.

Criterion 1: Completion of the current review of the secondary school funding formula.

This report is the final written output of an Independent School Funding Review examining Jersey's 4-18 education funding model. This review has been carried out in late 2019, reporting in early 2020. The scope of this review includes the following elements of Jersey's education system:

- Primary, including attached nurseries (also referred to as early years (EY)).
- Secondary
- 16-18 provision, both academic and technical²
- Special schools
- SEN in mainstream education

This scope covers both fee-paying and non-fee-paying providers across primary and secondary schooling. Therefore, there are a total of 38 schools and colleges within the scope of this review with an annual operating budget of £88.4m.³

In conducting this review, analysis reviewed the following funding streams and approaches:

- The core allocation mechanism for school budgets (AWPU)
- Support provided for additional needs, including Special Educational Needs (SEN), Jersey Premium (JP), English as an Additional Language (EAL) and other targeted funding streams
- The approach taken to support the fee-paying sector

Therefore, this review completes the previous work undertaken to review the secondary school funding formula, and makes recommendations to update and improve the secondary formula.⁴

¹ The ITT documents are available from GoJ, reference CP19/05/713.

² This covers non-fee-paying provision at Hautlieu and Highlands (under 19 only) as well as fee-paying 16-18 provision at Victoria College, Jersey College for Girls, De La Salle and Beaulieu.

³ For a full list of providers included in scope, see Section 4 of this Appendix.

⁴ Previous work to review the secondary school funding formula had been undertaken by internal teams within CYPES.

Criterion 2: Appraisal of the work to date on Special Educational Needs Funding in mainstream education.

As confirmed under our response to criterion 1, this Independent School Funding Review included appraisal of the provision for Special Educational Needs Funding in mainstream education, as well as special schools. This meant that our engagement with school leaders included discussion about the process and funding level for SEN in mainstream education, and further our analysis included review of the level of funding for pupils with SEN.

Through this review, we have found that the level of funding provided for many additional needs is insufficient, including SEN. In recommendation 3 we call for GoJ to *Increase the funding available to schools to support students with the most significant Special Educational Needs (SEN)*, specifically through targeted changes to the “banded funding” mechanism. This is intended to lower the barriers that currently prevent schools from accessing SEN funding, and to provide a direct uplift to the level of SEN funding provided for children with high needs.

Criterion 3: Broaden school funding formula review to include primary school education.

As confirmed under our response to criterion 1, this Independent School Funding Review included primary school education (and attached nurseries) within its scope. This meant that analysis and engagement undertaken as part of this review included an assessment of primary school funding.

The recommendations made in the final report cover primary school education and include a series of initiatives aimed specifically at primary schools.

Criterion 4: Broaden school funding formula review to include special schools and additional and alternative provision (currently not funded through a formula).

As confirmed under our response to criterion 1, this Independent School Funding Review included additional and alternative provision and special schools.⁵ This meant that analysis and engagement undertaken as part of this review included an assessment of special school funding.

The recommendations made in the final report cover special school education, as well as initiatives to improve the funding of special educational needs in mainstream education. Beyond the immediate scope of this funding review we have also recommended that GoJ conducts a comprehensive review of the inclusion model (including provision within mainstream and special schools).

⁵ There are two special schools in Jersey (Mont à L'Abbé and La Sente). These schools have been included as part of this review.

Criterion 5: Review of 16-18 school and college funding, in the context of existing 6th Form provision and Ministerial plans to consider the extension of the school participation age to 18 years.

As confirmed under our response to criterion 1, this Independent School Funding Review included 16-18 education (academic and technical) within its scope. Practically, this means that 6th form provision at Hautlieu, FE provision at Highlands, and additional provision within the fee-paying sector was included in scope.

Specifically, recommendation 2 covers the provision of technical and vocational education for 16-18-year olds. Further, we recommend that the GoJ review the level of post-16 education funding as a result of the analysis and insight that came from the final report of the post-16 education consultation.⁶ This may result in significant changes to the level and/or approach for administering funding for Further Education, including 16-18 technical education, as well as adult education and retraining.

As a result of our review, we recommend that the post-16 education funding team strongly consider addressing the disparity in funding between vocational and academic routes at age 16-18 (recommendation 2) and continue to ensure that Highlands College are able to access funding mechanisms aimed at promoting equity, such as Jersey Premium. Again, any changes should take into account and be aligned with the post-16 review.

Criterion 6: Review expenditure of staffing and non-staffing costs (headroom) to ensure an optimum use of funding in schools.

As part of this review, we reviewed the financial accounts for providers of education on Jersey. This included review of Allocations and Expenditure, broken down by category of income/spend. Therefore, this work included review of staffing and non-staffing costs (headroom).

As a result of this analysis, we recommend a simplified funding formula that provides greater autonomy for school leaders. This is intended to provide schools with greater flexibility to manage their budgets and prioritise according to the needs of the pupils and staff in their school (see recommendations 1 and 11). In combination with the recommended overall increase in funding, this will give heads the ability to set a suitable level of headroom for their school, based on the needs of their students and staff. We recommend this high autonomy approach as heads will have a deeper understanding than those at the centre of their school context and the level of headroom they require.

⁶ [GoJ's post-16 education consultation document](#), May 2019.

Criterion 7: Review current resource provision for Jersey Premium (JP), English as an Additional Language (EAL) and other targeted funding streams.

As confirmed under our response to criterion 1, this Independent School Funding Review included review of core allocations to schools, as well as additional funding streams such as JP and EAL. We discussed targeted funding streams with stakeholders as part of our engagement and conducted analysis to assess whether the level of funding was appropriate for these targeted streams. This included review of the outcomes achieved for students under the Jersey Premium programme.

We found that targeted funding streams are a useful source of income for schools, but that they are not funded at the right level, particularly for EAL. This means that the level of funding received in some of these streams is not sufficient to enable schools to provide the service that the funding is intended to support. For more information, see recommendations 8 and 9.

Criterion 8: Review of grant funding to the Government and private fee-paying sector, as currently structured, assessing the equity of funding for single-sex schools.

As confirmed under our response to criterion 1, this Independent School Funding Review included review of both fee-paying and non-fee-paying providers across primary and secondary schooling. Therefore, there are a total of 38 schools and colleges within the scope of this review with an annual operating budget of £88.4m.⁷

Our review of grant funding to the fee-paying sector has found that there is significant inequity in the level of funding provided for different children in Jersey, dependent on school type. This includes single-sex schools (Victoria College and Jersey College for Girls) as well as mixed-sex schools. This is illustrated in Section 5.2 of the main report, including in Figure 4 which shows the disparity in spend per pupil in the fee-paying and non-fee-paying sectors. As there is no funding-based reason to maintain a disparity in funding between government single-sex and coeducational fee-paying schools we recommend that GoJ review fee levels at the single sex schools to enable parity of funding.

Criterion 9: Review of the efficacy of introducing a three+ year school budget planning cycle and the impact of the disjoin between the academic and financial years.

Throughout the review we heard from schools a clear desire for more financial certainty, including three-year budgets. We make a recommendation (11) to *Increase schools' financial freedom so they can hold reserves for future challenges and can allocate their budgets to maximise the quality of education for their students*. This is intended to lay the foundations towards a system of forward-looking financial planning.

⁷ For a full list of providers included in scope, see Section 4 of this Appendix.

Our findings from this review recommend that Jersey continue to adopt a formula-based approach. This means that schools would be funded based on pupil numbers, and then a series of factors such as building condition, or additional needs. Given that each of these criteria (pupil numbers, additional needs for pupils, and school needs) are not perfectly predictable in advance, it is not possible to adopt both a multi-year budget cycle and one that uses a formula to match costs of delivery. Our recommendations centre on a model for funding schools based on a formula.

The benefits of a multiple-year cycle are that schools would be empowered to make investment decisions and plan for the future. However, in the current system where pupil numbers are not predictable (especially at 14+), and where additional needs payments make up a significant part of school budgets, we do not believe that it is appropriate for schools to operate on multiple year budget cycles.

Through our review, we have not found significant evidence to suggest that GoJ must align the academic and financial cycle. Whilst the disjoin is not ideal, this was not cited as a significant problem by stakeholders, and therefore we do not recommend that this is a priority for the immediate future.

Criterion 10: A longer-term analysis of funding for a potentially non-selective school system.

This Independent School Funding Review included all secondary schools on Jersey, and therefore this also included review of the selective non-fee-paying school, Hautlieu. Through the Independent School Funding Review, we have found that this process of selection has the following drawbacks:

- The remaining non-fee-paying secondary schools (not Hautlieu) experience uncertainty in pupil numbers as the numbers accepted to Hautlieu vary each year. Given the funding model, this results in uncertainty about a school's income and makes matching staffing to student numbers challenging.
- Due to lower pupil numbers in the non-fee-paying secondary sector, there are implications on curriculum offer, with schools either running a large curriculum at sub-scale (which is financially unviable in the long term), or reducing their curriculum offer, which reduces the quality of education for students.
- To support non-fee-paying secondaries to continue to offer a broad curriculum, there is some double funding of KS4 by GoJ. While understandable given the structure of the current system, this is not an efficient use of funds overall.
- The current system leads to many high attaining students leaving their secondary schools at age 14, which has a negative impact on the overall performance of the non-fee-paying secondaries.
- There are some challenges relating to the emotional well-being of pupils, staff and parents, due to the uncertainty caused by selection at age 14, with some students moving and others staying behind.

In policy decision 1 we recommend that GoJ consider the role of selection in the non-fee-paying Jersey education system, including the following options:

- Moving the age for all selection to 16, removing the double selection at 14 and 16.
- Removing selection entirely, and making Hautlieu a non-selective school

The review did not include detailed analysis or assessment of the broader impact of implementing a non-selective school system, such as:

- The impact on outcomes for pupils who would have been in selective/non-selective systems
- Other impact on pupils, such as travel times, access to facilities etc.
- The impact on parents, including assessment of whether removing the selective system would lead to an increase in use of fee-paying providers
- The impact on schools, included predicted pupil numbers, and the anticipated requirement for staff, curriculum offer and facilities.

These broader issues would require consideration ahead of any policy change regarding selection.

2. Methodology of the Independent School Funding Review

2.1. Our approach

This report was commissioned to review the funding of schools in Jersey. The scope of the review was confirmed by the Independent School Funding Review team and approved by CYPES. This scope is outlined in Section 1 of the main report. In the ITT documents produced by GoJ, the commissioning team set out 10 objectives for the review; Section 1 of this Appendix document provides detail about how this review meets those objectives.

Our approach was to complete the work over three phases, each of which having an accompanying workshop. This is outlined in Figure 1 below. The phases, and objectives for each phase, were as follows:

- 1. Current situation and international comparators:** The focus of this phase was to agree the objectives and scope of this review, understand the current funding model and review alternative approaches from international comparators. In this phase work, an exercise was completed to agree a long-list of options for how education can be funded (see Section 2.3 of this Appendix), and to agree appraisal criteria for any future model (see Section 2.2 of this Appendix).
- 2. Options development:** The focus of this phase was to move from long-list to short-list, providing a greater level of detail about the proposed changes to the funding model. These short-listed recommendations were reviewed against the appraisal criteria and discussed at a workshop with stakeholders from Jersey's education system.
- 3. Options appraisal and recommendations:** In this phase, the focus was to finalise recommendations, including engagement around recommendations with key stakeholders. In addition, the team drafted this final report and accompanying analysis files for handover (in Excel).

Phase	Current Situation and International Comparators				Options Development			Options Appraisal and Recommendation			
Date	28 Oct	4 Nov	11 Nov	18 Nov	25 Nov	2 Dec	9 Dec	16 Dec		6 Jan	13 Jan
Week	1	2	3	4	5	6	7	8		9	10
Main activities	1. Kick off meeting 2. Agree deliverables, governance and project plan 3. Agree policy objectives and criteria for evaluating options 4. Review and understand existing work on funding reviews, working with GoJ teams 5. Understand existing data on funding and standards 6. Book in stakeholder interviews	1. Interviews with key stakeholders, including heads, unions, Children's Commissioner 2. First draft of Excel funding model with "as is" formulae, allocations and quantified outcomes	1. Evaluation of current provision against criteria, highlighting areas to be addressed under the new formula 2. Initial evaluation of value for money across major categories of spend 3. Summary of stakeholder views on current formula	1. Current state workshop, bringing together the Jersey current state and international examples of best practice to create an initial set of possible funding changes 2. Development of initial long list of options, covering a range of changes to quantum, distribution and conditionality of funding	1. Long list options workshop to create long list of options 2. Development of detailed evidence base for long listed options, drawing on international examples and stakeholder views 3. Initial outline financial modelling of long listed options	1. Write up of long list of options, including evidence base and outline impact 2. Test long list of options with stakeholders	1. Short list options workshop to select the short list for evaluation in the Options Appraisal phase, based on the criteria established in week one 2. Detailed financial modelling of funding formula for each short listed option	1. Bring together full evidence base and financial implications of short listed options 2. Test short listed options with stakeholders 3. Write up first draft of report		1. Iterate report with GoJ team 2. Write second draft of report	1. Finalise report with GoJ team 2. Hand over financial models
Principal outputs	1. Statement of policy objectives, scope and criteria for evaluating options 2. Agreed deliverables - list, high-level content	1. Excel model showing funding, budgets and student outcomes	1. Evaluation of as is against objectives 2. Stakeholder landscape and views summary	1. Long list of options for funding reform (initial draft)	1. Long list of options for funding reform (detailed, agreed) 2. Financial model for long listed options	1. Understanding of stakeholder views on long list	1. Short list of options to take to detailed appraisal	1. First draft final report		1. Second draft final report	1. Final report 2. Excel financial model handed over
Governance	Review ▲	▲	▲ Workshops	▲ Tues	▲ Thur	▲	▲ Tues	▲		▲	▲

Figure 1 Project plan outline

2.2. Options appraisal

The overall aims of the review were to provide a fully independent assessment of Education funding in Jersey. Throughout the process, the Independent School Funding Review team have balanced our independent status with extensive engagement and understanding of the current state, on which to base our recommendations for the future direction of Education funding policy.

In order to achieve this balance, at the outset of the project we prioritised agreeing a set of criteria which would underpin the review and work conducted to reach the review's recommendations. This was to ensure that the Independent School Funding Review aligns with the policy aims of the stakeholders who will be implementing the findings of this review. A funding review must understand what is important to fund in any given system, to ensure it will be effective in delivering the intended outcomes. Defined and agreed criteria gave us an articulation of what is important to pupils in Jersey and provided a standard structure for reviewing the benefits and drawbacks of any given funding formula option or recommendation.

2.2.1. Appraisal criteria for prioritisation

Any funding model is linked to policy. This is because the funding model must define *what matters* in the education system, by targeting funding towards particular initiatives, and by creating incentives to drive behaviour in the system. Therefore, as part of the options appraisal process, the Independent School Funding Review team co-developed assessment criteria that help to ensure that any future model is built not only to be efficient (meaning value for money is maximised and funds are directed to recipients), but also to be effective (meaning that funds drive the right outcomes from the Jersey education system).

The criteria developed for this review have been agreed following discussion with stakeholders from the Jersey education system and building upon the approach set out in the UK Government's HM Treasury Green Book, and also building upon best practice identified from the criteria used in other jurisdictions' funding reviews.⁸ The process for agreeing the assessment criteria was planned as follows:

- Draft provisional review criteria prior to the first workshop
- Present the provisional review criteria to the Government of Jersey project team at the first workshop, inviting comments from all attendees
- Consider all comments from attendees, and accept or reject accordingly
- Present updated review criteria to the Education Minister and advisors for sight and sign off of the review criteria going forward

The resulting review criteria were re-presented to stakeholders at each subsequent workshop.

⁸ [A consultation on school funding reform: Rationale and principles](#), DfE, 2011; [HM Treasury Green Book](#) – Central Government Guidance on Appraisal and Evaluation; [The funding of school education](#), Summary paper, OECD.

The criteria as agreed for this review are as follows:

CRITERIA FOR ASSESSMENT		
Strategic fit	Alignment with policy outcomes	<ul style="list-style-type: none"> Increases overall educational achievement on Jersey Reduces inequality of outcomes Equips students with the employability and life skills to thrive in the current and future economy Provides equitable and sufficient support for additional needs, including SEN, SEMH, EAL and deprivation Increases the overall efficiency of the system
	Efficiency of the funding process	<ul style="list-style-type: none"> Is transparent and simple so heads, teachers, parents and young people can understand it and it has low admin costs Is fair in matching available funding to children's needs, with funding following the child and schools sustainably funded Is flexible so it can accommodate future policy priorities, demographic changes and economic needs of Jersey Does not create perverse incentives to do things which are not in the best interest of children Promotes budget discipline and efficiency, including enabling medium-term financial planning
Feasibility of delivery	Financial impact	<ul style="list-style-type: none"> Proposed changes provide good value for money in the long term Proposed changes are affordable for GoJ
	Implementation impact	<ul style="list-style-type: none"> Change programme required is deliverable at the central level Change programme required is deliverable at a school level Associated risks, including those arising from stakeholders, can be managed and mitigated appropriately

Figure 2 Options appraisal criteria

2.3. Long-list options considered as part of this review

This Independent School Funding Review makes recommendations about the funding model for the education system in Jersey. In order to define the future funding model for Jersey’s education system, we reviewed international and academic literature to develop a long-list of potential future funding approaches for education services.⁹ This long-list was discussed with stakeholders, which provided useful insights about the desirability and feasibility of each of the options.¹⁰ The long-list can be summarised as comprising two fundamental choices: 1) What are payments given for, and 2) How are funds allocated? This framework is explained in Section 6 of the main report.

This framework was assessed against the options assessment criteria discussed above, which resulted in the prioritisation of model 1, which is a centrally-determined, cost-matching approach. This means that the GoJ would continue to run a central funding formula which is allocated to providers on a “cost matching” basis. The judgements included in this assessment have been summarised in the table below.

CRITERIA		1 Centrally-determined, cost-matching funding	2 Performance-based funding	3 Consumer-led provision	4 Market drives excellence
Strategic fit	Alignment with policy outcomes	H – ability to flex model to policy aims	M – good for students, bad for school stability	L – poor on equity	V Low – poor on equity and significant instability
	Efficiency of the funding process	M – requires central team for management	L – requires high oversight and challenge	L – requires high information for consumers	M – low waste due to “market”, but low stability for providers
Financial impact		Not modelled due to interdependence with sub-options (the precise funding model within each of the longlisted options)			
Feasibility of delivery	Implementation impact	M/L – smallest change required	M/H – high level of change	M/H – high level of change	H – very high level of change
		1 st	2 nd	3 rd	4 th

Figure 3 Long-list appraisal summary

⁹ See Section 6 of the main report.

¹⁰ See engagement tracker in Section 3 of this Appendix.

3. Governance and engagement

3.1. Governance and project plan

This project was governed by a dedicated team within the GoJ. Two senior stakeholders from CYPES (the Group Director of Education, and the Director of Policy and Planning) acted as project sponsors, with a dedicated Project Officer to run the project and engagement.

Weekly review calls were held throughout the project to monitor the development of the project, and review progress against the project plan. These calls included the full review team, as well as the two project sponsors and project officer. These weekly updates followed a standardised format, covering: Work completed this week including engagement; priorities for next week; changes in risks; and an update against the project plan. Items for discussion were agreed dependent on the week of the project.

Data collection played a key role in the review process. The review had two main sources of data from within GoJ, in addition to making use of publicly available data:

- The Statistics and Planning team, who shared outcomes and characteristics related information with the review team; and
- The Education Finance team, who shared core financial information with the review team.

A meeting between the review team CYPES Head of Education Insight, Head of Statistics, preceded any transfer of information. During this meeting, all aspects of information security around the data under consideration during the review were covered in depth, to ensure compliance with all relevant legislation and best practice.

3.2. Engagement with stakeholders

The review team engaged with stakeholders in two main ways over the course of the project:

- Through extensive one-to-one (or two-to-one) interviews with individual stakeholders across Jersey
- Through a series of workshops, at which a panel of key figures in Jersey education, representing various stakeholder groups, met to discuss and feedback on the ideas and options presented by the review team

It was central to our review approach that we engaged with as many individual stakeholders as the review period allowed, in order to ensure we were gaining a full and complete view of the issues facing education in Jersey.

Stakeholders engaged include:

- All headteachers of non-fee-paying schools, both Primary and secondary
- Headteachers from the fee-paying maintained schools, both Primary and secondary
- Representatives from the Governing Bodies of fee-paying maintained schools
- Headteachers of Mont a l'Abbe and La Sente

- Groups of students from non-fee-paying schools (including a student council)
- Union representatives (NASUWT and NEU)
- Representative of NAHT
- Key budget holders within CYPES
- Facilitators of the Big Education Conversation (CYPES)
- Leads of Jersey specialist groups such as Jersey Music Service
- Children's Commissioner
- Ministers from the Government of Jersey

Insight from interviews with stakeholders provided the basis for our research and recommendations throughout the review.

3.2.1. Stakeholder Workshops

We held three workshops over the course of the review. Each workshop was attended by a panel of representatives from key stakeholder groups. For consistency, we engaged the same panel at all three workshops, enabling them to follow the development of our ideas and recommendations, and provide feedback accordingly. Workshop attendees included:

- A Primary headteacher
- A Secondary headteacher
- Civil servants and CYPES representatives
- Representatives from the CYPES finance team
- Representatives from the CYPES statistics and planning team

At each workshop, we captured all comments by encouraging attendees to write on post it notes, which were then types up to record all feedback.

3.2.2. Record of stakeholders engaged

We engaged with a number of stakeholders from Jersey, and representing different aspects and viewpoints with a stake in Jersey's education system. The table below provides a record of all of the individuals we engaged with as part of the review process. Where the Review Team met with an individual several times the date given is that of the first substantial meeting.

Name	Role	Organisation	Date (first meeting if multiple meetings)
Mal Robson	Headteacher	Springfield	06 November 2019
Sam Cooper	Headteacher	d'Auvergne	06 November 2019
Tracey Vallois	Minister for Education, Senator	Government of Jersey	06 November 2019
Mark Rogers	Director General, Children, Young People, Education and Skills	CYPES	06 November 2019
Seán O'Regan	Group Director, Education	CYPES	06 November 2019
John Baudains	Headteacher	La Moye	07 November 2019
Sarah Hague	Headteacher	Les Quennevais	07 November 2019
Susan Morris	Headteacher	Grainville	11 November 2019
Donna Lenzi	Headteacher	FCJ	11 November 2019
Nick Falle	Headteacher	Hautlieu	12 November 2019
Cris Lakeman	Senior Adviser	CYPES	12 November 2019
Nicola Mulliner	Head of Early Years	CYPES	12 November 2019
Headteacher group	All Primary Headteachers	All Primary Schools	12 November 2019
Russell Price	Headteacher	Rouge Bouillon	14 November 2019
Kirstie Williams	Headteacher	St Saviour	14 November 2019
Chris Beirne	Headteacher	Beaulieu Primary & Secondary	14 November 2019
Andrea Firby	Head of Primary School	Beaulieu Primary & Secondary	14 November 2019
Trudie De La Haye	Headteacher	St John	15 November 2019
Stuart Hughes	Headteacher	Haute Vallee	15 November 2019
Liz Searle	Headteacher	Mont a L'Abbe	15 November 2019
Tom Turner	Headteacher	La Sente (D'Hautree)	15 November 2019
Headteacher group	All Secondary Headteachers	All Secondary Schools	15 November 2019
David Bery	Director, Standards and Achievement	CYPES	19 November 2019
Anthony Goldhawk	Assessment Adviser	CYPES	19 November 2019
Jenny Posner	Headteacher	St Martin	20 November 2019
Alun Watkins	Headteacher	Victoria College	20 November 2019
Daniel Pateman	Headteacher	Victoria College Prep	20 November 2019
Phil Walker	Headteacher	Plat Douet	27 November 2019
Richard Heaven	Headteacher	St Clement	27 November 2019
Marina Mauger	Teacher's Union representative	NASUWT	27 November 2019
Lynsey Miller	Teacher's Union representative	NEU	27 November 2019
Andy Adkin	Headteacher	Le Rocquier	28 November 2019
Jo Terry-Marchant	Principal	Highlands	28 November 2019
Carl Howarth	Headteacher	Jersey College for Girls	28 November 2019
Richard Sugden	Headteacher	JCP	28 November 2019
Iain George	Headteacher	Janvrin	29 November 2019
Sonia Burton	Headteacher	Bel Royal	29 November 2019
Lyndsay Feltham	Civil Service and Manual Workers Union representative	Unite, Prospect	29 November 2019
Jack Norris	Policy Principal	Big Education Conversation	04 December 2019
Jason Turner	Headteacher	De La Salle College	05 December 2019
Gary Coutanche	Headteacher	De La Salle Primary	05 December 2019
Robert Ward	Deputy, Chair of the Education and Home Affairs Scrutiny Panel	Government of Jersey	05 December 2019
Saboohi Familli	Director of Young People, Further Education, Skills and Learning	CYPES	05 December 2019
Ashok Patel	Consultant	Highlands College	06 December 2019
Deborah McMillan	Children's Commissioner for Jersey	The Office of the Children's Commissioner	06 December 2019
Sam Mézec	Minister for Children and Housing	Government of Jersey	06 December 2019
Lyn Linton	Headteacher	First Tower	09 December 2019
Vicki Charlesworth	Headteacher	Les Landes	09 December 2019
Katy McMahan	Headteacher	Trinity	09 December 2019
Graham Cox	Principal	Jersey Music Service	09 December 2019
Adam Turner	Headteacher	St Luke's	10 December 2019
Rachel Baxter	Senior Adviser	CYPES	10 December 2019
Samantha Dixon	Headteacher	St Peter's	11 December 2019
Mike McDermott	Headteacher	Samares Pathways Centre	11 December 2019
Giselle Willis	Head of SEN	CYPES	11 December 2019
Kathryn Robinson	Head of SEMH	CYPES	11 December 2019
Charlie Parker	Chief Executive Officer and Head of Public Service	Government of Jersey	19 December 2019
Debbie Key	Head of Early Help	CYPES	19 December 2019
Louise Summers	Head of CAMHS	CYPES	07 January 2020
Jeremy Maçon	Minister for Children and Housing	Government of Jersey	16 January 2020
Warwick Long	Chair of Parent Carer Forum Jersey	Parent Carer Forum Jersey	17 January 2020
Heidi Lewis	Member	Parent Carer Forum Jersey	17 January 2020
Timothy Cormac	Member	Parent Carer Forum Jersey	17 January 2020
Kate Wyatt	Member	Parent Carer Forum Jersey	17 January 2020
Haute Vallee student group	Students (mixed age group)	Haute Vallee	17 January 2020
Hautlieu student council	Student council (mixed age group)	Hautlieu	17 January 2020

3.3. Themes emerging from engagement

Building on the content in Section 5.7 of the report, the table below summarises the key feedback from consultation, grouped by consultation theme.¹¹

STAKEHOLDER FEEDBACK	
<p>Jersey's unique context poses challenges that are not adequately accounted for in the funding model</p>	<ul style="list-style-type: none"> • Stakeholders indicated that Jersey's unique context, with high costs of living and therefore higher staff salaries, means that pound for pound comparisons with the UK or other jurisdictions are problematic. In practical terms, the high share that staff costs account for in a school's overall budget (with some indicating over 95%) means that there is a limited discretionary budget for headteachers to allocate to other priorities. • Headteachers expressed that it was very difficult to identify and attract sufficient numbers of high-quality candidates for teaching roles in the island. Access to a pool of supply teachers was also identified as an issue for schools, and stakeholders felt that current processes around supply teaching exacerbated the issue.
<p>Jersey Premium has been welcomed, but is papering over cracks in the system</p>	<ul style="list-style-type: none"> • The introduction of the Jersey Premium (JP) was praised by stakeholders throughout consultation. The majority of those interviewed were comfortable with the process of reporting and appreciated the autonomy afforded by the JP. • A number of stakeholders felt that, whilst a step in the right direction, JP was insufficient in supporting schools to meet the complex needs of disadvantaged pupils and that a greater level of funding should be allocated, particularly for the most deprived pupils.
<p>The funding model is out of date, underfunded and, in a range of areas, viewed as unfair by the majority of stakeholders</p>	<ul style="list-style-type: none"> • The funding model is viewed as out of date and there is a perception amongst consultees that it was developed for a substantially different system, with different pupils and priorities, and has struggled to keep up with change in the intervening period. • Stakeholders believe that the system is underfunded as a whole system, with the impact of this underfunding hitting disadvantaged and high need pupils disproportionately. • There is also a strong perception that the system is unfair. This unfairness was described in various ways, including equality of opportunity for all Jersey pupils irrespective of their backgrounds and needs, as well as the distribution between different sectors (primary, secondary, further education, fee-paying and non-fee-paying). • A range of stakeholders pointed to a disparity between rural and urban schools (particularly across primary schools). Town schools were felt to have worse access to facilities, including the size of their playgrounds and access to playing fields, and that this was not accounted for under the current funding system.

¹¹ This is not the analysis of 2020 Delivery, but rather a record of the views of stakeholders engaged through this review.

	<ul style="list-style-type: none"> • The gulf between non fee-paying and fee-paying schools, in terms of spend per pupil and access to superior facilities, was highlighted often and by a range of consultees, particularly in the context of funding provided to fee-paying schools by the GoJ. • Disparities between the fee-paying schools themselves were also raised. Different fee-paying schools have different arrangements regarding their property ownership, rental payments, major and minor works to their buildings, funding provided for pupils with additional needs, ability to independently raise fees, governance arrangements and their ability to operate with autonomy more generally. These differences, from the perspective of stakeholders consulted, create inequities between schools and therefore pupils. • Primary school headteachers pointed to the fact that some schools with nurseries were able to benefit from fluctuations in nursery capacity across the school day by deploying nursery staff resources in primary classes. This was, however, not available to schools without nurseries attached. • There were specific examples of differences between similar schools that, from the perspective of the stakeholders, did not seem to have a clear rationale and contributed to unfairness (such as variable funding for lunchtime supervision).
<p>The funding model and approach is overcomplicated and difficult to understand</p>	<ul style="list-style-type: none"> • The majority of stakeholders found the existing funding formula complex and difficult to explain to others. This has contributed to a perception of a lack of transparency in the funding system and has perhaps undermined further confidence in its fairness - most headteachers felt that teaching staff had very strong views on the model, without necessarily understanding how calculations were made. • Perceptions of complexity and a lack of transparency were increased in cases where funding is calculated on a recurring block grant basis (such as for special schools). Headteachers pointed out that they are not aware of how these block grants are calculated in practice. • The finance system and tools that support the administration of the funding model were also felt to be out of date and overcomplicated by many consultees. • Specific elements of the funding system, even those managed largely by schools themselves, were also highlighted as issues. For instance, many school leaders were unclear as to how Supplementary Allowance (SA) points were calculated, the rationale for their differing distribution across schools and how they should be allocated according to the type and amount of responsibilities a staff member has.
<p>The funding model does not adequately support schools in addressing the additional needs of children and young people in a timely manner</p>	<ul style="list-style-type: none"> • The current funding system does not allow schools to adequately support pupils with Special Educational Needs according to the majority of stakeholders. The widespread view is that this was a result of the formula itself and the processes and mechanisms in place to access funding. For instance, schools are required to meet a threshold number of hours of support, and provide evidence of doing this over a sustained period, to access additional funding. In practice, many schools are unable to meet these thresholds under current funding arrangements.

- The funding formula, as a result of the manner in which it is calculated, does not always reflect the reality of the school's current pupil and staff population, on account of the lag between the calculation and the funding being allocated. Schools with large in-year migrations of pupils are most impacted by this system, and report that they can be left underfunded against their actual pupil numbers. More generally, there was frustration that funding does not, within a reasonable timeframe and in all cases, follow the pupil.
- Stakeholders identified the inadequacies of the funding system to support appropriately pupils with English as an Additional Language (EAL). This was particularly the case in primary schools, with some schools having a significant proportion of EAL pupils. Some schools had been forced to scale back effective intervention programmes due to budgetary constraints and central service support for EAL pupils was felt to be under resourced. The need for a high impact early intervention approach was identified by many stakeholders.
- The implications of adequately supporting pupils with Social Emotional and Mental Health (SEMH) needs was also identified as a pain point by stakeholders. In both of the student focus groups, concerns about the stress and pressures of school and their impact on mental health and wellbeing were raised. Whilst students felt that, whilst schools were improving in how they supported students, more could and should be done and that greater access to counsellors and trained teachers would help. Headteachers in particular pointed out that a combination of better awareness of the support required for pupils with SEMH needs, increasing reporting requirements regarding safeguarding and a perception that more pupils were presenting with SEMH needs was increasing the workload on staff in schools, with no additional funding to offset this. In addition, other non-school led services and programmes often lead to greater workload on the school and its staff, such as the Early Help Approach, where school staff are frequently best positioned to support children and young people. More generally, stakeholders felt that they and their colleagues would benefit from more and better training to manage the SEMH needs of pupils, and in particular behavioural challenges.
- Across the consultations, stakeholders fed back that central services to support additional needs were overstretched, unable to respond to requests in an adequate timeframe and therefore unable to support schools adequately. These services include the Social, Emotional and Mental Health Inclusion Team (SEMHit), Child and Adolescent Mental Health Services (CAMHS) and education psychology support.
- Identifying pupils, engaging external services and monitoring the support delivered to pupils with complex needs are activities that all require thorough record keeping and administrative activity. According to headteachers, the increasing burden of this administrative activity is currently being absorbed by schools at the expense of other initiatives and is causing some schools to reconsider and amend their staffing structures.

<p>Improvement in early years provision is needed and would have beneficial impacts across the system</p>	<ul style="list-style-type: none"> • Most stakeholders, but in particular primary school headteachers, reiterated the importance of high-quality learning provision in early years and the beneficial impact this would have across the system. There was also a perception that early years provision in Jersey was not sufficiently prioritised, particularly in comparison to the UK.
<p>Mental health and wellbeing of pupils, school staff and parents is a growing concern</p>	<ul style="list-style-type: none"> • School headteachers identified pupil mental health and wellbeing needs as an increasing trend and cause for concern. Whilst support programmes were being delivered across primary and secondary schools, more provision (in the form of programmes and training) to help schools support pupils was requested. The period of transition between levels of education was highlighted as an example where more support could be provided for pupils. • In addition, headteachers identified a trend of increased stress and mental health issues amongst staff. This increase was linked, according to most consultees, to greater pressure on staff as a result of improving standards and accountability as well as better awareness of mental health issues in general. Whilst a number of schools were implementing ad hoc programmes, and there was acknowledgement of the formal support available, consultees requested consideration of programmes and initiatives that enable schools to better support staff.
<p>The balance of autonomy and central control is not optimal across a range of areas</p>	<ul style="list-style-type: none"> • In general, stakeholders expressed a desire for greater autonomy for headteachers and schools than exists under the current model. Headteachers want greater freedom and flexibility for schools to make their own decisions over education provision, backed up by an appropriate accountability regime. In particular, greater control of human resource (HR) processes, such as headcount changes, would be welcomed. Nonetheless, some stakeholders acknowledged the benefits of the more centrally administered approach and few consultees in the non-fee-paying sector wanted autonomy entirely (for example over elements such as payroll). • Greater clarity on the status of fee-paying schools under the current system and the autonomy afforded to them was also a key theme in a number of discussions. There was an openness expressed to reviewing the current arrangements to that end.
<p>There are concerns about the capacity of and processes mandated by central services</p>	<ul style="list-style-type: none"> • There was widespread feedback that a greater understanding of the school context from central services (whether CYPES or other support functions) would be beneficial. • In addition, a number of consultees felt that central support teams (within CYPES) were increasingly overstretched and, whilst the support they received was helpful, in reality schools would benefit from greater frequency of interaction (in particular in relation to finance). • Processes relating to HR were raised throughout consultation. The current process for amending headcount and advertising for new staff, for instance, was described as bureaucratic and burdensome.

<p>Schools face challenges in relation to their infrastructure and their capacity to maintain their sites under current arrangements</p>	<ul style="list-style-type: none"> • Many of the school buildings were described as not fit for purpose by a large number of consultees. This perception was particularly common in schools with old sites and in urban areas, however even some of the relatively newly constructed buildings suffered as a result of poor design features. In some cases, students raised the issue of overcrowding and insufficient space to conduct independent learning. The impacts of this were being felt directly by pupils and staff, and in some instances were described as jeopardising learning outcomes and safety. • Many headteachers identified issues with the accessibility, capacity and overall funding of Jersey Property Holdings (JPH) to commission and undertake major works (large infrastructure costs). There was widespread agreement that JPH was underfunded on the whole. • Most headteachers felt that the available budget for minor works (to address ongoing maintenance) was insufficient and did not account for the age and condition of the sites. • A number of schools (particularly special schools) reported that the current staff funding arrangements did not allow them to employ a caretaker, resulting in other staff members, and usually the headteacher, responsible for addressing a range of site issues.
<p>Special schools share many of the issues that non-special schools encounter and face some specific challenges</p>	<ul style="list-style-type: none"> • Both Mont a l'Abbe and La Sente face particular infrastructure and maintenance challenges that are accentuated as a result of the specific needs of their pupils. Both schools have, to a greater or lesser extent, split site arrangements which present challenges that are not accounted for in their current block grant funding. They also face capacity challenges, both now and in the future, and the headteachers feel unable to adequately support the complex needs of pupils, in a safe and secure manner, under current arrangements.
<p>The current inclusion model does not adequately provide for the complex needs of pupils in some cases</p>	<ul style="list-style-type: none"> • The effectiveness of the island's current inclusion model and its ability to cater for the complex needs of pupils, was called into question by a range of consultees. • The general view of stakeholders was that, where possible, the education system should ensure sufficient flexibility to include and integrate pupils with specialist education needs, and which prevent segregation in learning opportunities. Some stakeholders felt that, were the system better set up to support learners with complex needs, more pupils could remain in, or partially in, mainstream, education. This would, stakeholders acknowledged, require a fundamental review of the inclusion model and the funding, resources and infrastructure in place to support it. • Notwithstanding this feedback, there was support for the continued role of special schools on the island. A number of consultees suggested consideration of a more tailored approach, with a greater range of provision tailored to the specific needs of different pupils would be beneficial. • Feedback on the current Additional Resource Centre (ARC) provision was broadly positive. One caveat to this related to meeting the demands of parental choice - certain ARCs have a particular focus (such as hearing impairment) and parents are increasingly keen for these services closer to their residences (to minimise travel). This creates challenges for ARCs to deliver specific services across the island.

<p>Schools are not incentivised and supported to develop more sustainable budgeting processes and behaviours</p>	<ul style="list-style-type: none"> • There was widespread agreement that the current one-year budget cycle is too restrictive, makes investment and medium to long term planning difficult and creates perverse incentives to spend any surplus at the end of the financial year (as no carry over is permitted). • There was general acknowledgement that, as a result of the shortcomings of the current funding formula, there is not an embedded culture of budgetary discipline. Further, schools are unclear as to what the consequences of overspending are. There was widespread agreement that, once the funding formula is revised, it would be necessary and beneficial to introduce greater accountability to this system. • Current tools and processes supporting the budgeting and forecasting activities of schools were seen as out of date and not particularly user friendly.
<p>Greater collaboration is welcome, but the right funding, incentives and targets must be aligned to support schools succeed</p>	<ul style="list-style-type: none"> • Most stakeholders were very positive about the concept of greater collaboration between schools. Whilst it was pointed out that some of these networks exist already (particularly at the primary school level and between certain secondary schools), the majority of these were informal and had been established and agreed with little input from the centre. Students were also very positive about the prospect of greater collaboration if it meant that they could access greater curriculum choice. • In particular, some consultees felt that high performing schools (and in particular the fee-paying sector) could do more to support other schools, particularly in relation to mentoring and sharing of best practice. Where these activities were occurring at present, they were valued. • A number of consultees wanted greater clarity on what collaboration meant. Whilst positive in theory, in practice experience had demonstrated some of the challenges of sharing staff and teaching certain subjects across school cohorts and sites. Students also had concerns about travelling between schools and the impact this would have on their learning.
<p>Selection at 14 is viewed as having a deleterious system-wide impact by the majority of stakeholders, but is strongly supported by some</p>	<ul style="list-style-type: none"> • The topic of selection at 14 and the role of Hautlieu was raised consistently in consultation with secondary school stakeholders. All stakeholders referenced the complexity of the issue and its contentious history. • Stakeholders raised a range of issues that the current approach creates, both direct and indirect. These ranged from funding, and the viewpoint that current arrangements create a double funding issue, to the impact on the emotional wellbeing of pupils, staff and parents. There were concerns that the current model, where many secondary schools see pupil numbers drop, narrows the curriculum offering in schools. This both impacts the pupils, in terms of their choice, and the staff, in terms of their ability to teach subjects they are expert in and passionate about (and thus job satisfaction). It also has un-intended consequences, such as secondary schools overfilling classes in expectation of numbers dropping post-selection. By far the biggest concern, however, related to the emotional and psychological impact the process has on pupils, staff and parents. Many pointed to anecdotal cases of the detrimental impact selection at 14 has on the confidence, mental health and wellbeing of individuals and the cohort of pupils within a school as a whole. This was reinforced in the student focus groups, with a number of students citing the disruptive nature of the change

	<p>and its demoralising impact. Students also felt that there was insufficient choice available to them post-16. Some students who live on the west of the island, for instance, articulated that the extended journey to school had an impact on their ability to engage in extra-curricular activities.</p> <ul style="list-style-type: none"> • On the other hand, there were a number of consultees who advocated strongly for the positive impacts of selection at 14, on individuals and the system. This was also reinforced by many, if not all, students engaged at Hautlieu. There were concerns that changes to this system would result in detrimental impacts on the development and academic success of high achieving pupils in the non-fee-paying sector and Jersey's overall performance in GCSEs and A Levels, in the medium term at least. Some students also felt that coming to Hautlieu provided an important lifeline for them where they had been unhappy elsewhere.
<p>Further education from 16 to 18 is overlooked in comparison to academic pathways and there is insufficient choice and information on post 16 pathways for pupils</p>	<ul style="list-style-type: none"> • Stakeholders consistently referenced the importance of 16-18 vocational pathways, whilst acknowledging that there was a need to widen the parameters so that a high quality and tailored education offering is accessible to all types of learners. There was a perception that, until recently, Jersey had overlooked further education pathways, and that it was falling behind other countries in this regard. • Students indicated that the stigma still existed around non-academic pathways and that better careers advice on these options earlier in school would be helpful. In general, students felt that they would benefit from a broader careers advice and guidance offering than they receive currently, with a greater focus on "life skills" and information that will prepare them for life after school. • Students indicated that there was insufficient flexibility in the existing system to study "academic" subjects alongside vocational pathways, and that they would value a more "pick and mix" approach. • Stakeholders acknowledged the challenges that further education faced on the island, in particular in relation to the complex literacy and numeracy needs of 16 to 18 learners in further education, and the shortcomings of current funding arrangements.
<p>There is broad support for a move towards mandatory education to 18</p>	<ul style="list-style-type: none"> • Whilst mandatory education was not a significant discussion point in consultations, when raised there was broad support for it in principle. However, some stakeholders pointed out that the number of students not in education or training was relatively low and that in many of these cases the individuals had extremely complex needs. Schools, and Highlands in particular, would need to be properly supported to address these needs should a decision to make education mandatory to 18 be made.

4. List of schools and colleges in scope of review

Government non-fee-paying primary schools	Government fee-paying primary schools	Non-maintained primary schools	Special schools
Bel Royal School	Jersey College Preparatory	Beaulieu Primary School	La Sente
d'Auvergne School	Victoria College Preparatory	De La Salle Primary School	Mont à l'Abbé School
First Tower School		FCJ Primary School	
Grands Vaux School			
Grouville School			
Janvrin School			
La Moye School			
Les Landes School			
Mont Nicolle School			
Plat Douet School			
Rouge Bouillon School			
Samarès School			
Springfield School			
St. Clement's School			
St. John's School			
St. Lawrence School			
St. Luke's School			
St. Martin's School			
St. Mary's School			
St. Peter's School			
St. Saviour's School			
Trinity School			
Government non-fee paying secondary schools and colleges	Government fee-paying secondary schools	Non-maintained secondary schools	
Grainville School	Jersey College for Girls	Beaulieu Convent School	
Haute Vallée School	Victoria College	De La Salle College	
Hautlieu School			
Highlands College			
Le Rocquier School			
Les Quennevais School			

5. Proposed Implementation approach

The recommendations included in the main body of the Independent School Funding Review report are intended for consideration and approval at Council of Ministers (CoM) ahead of implementation.¹² The timeframe for implementation therefore is dependent on the speed at which CoM are able to review and consider the proposal and recommendations for a future funding model. CYPES will need to be resourced appropriately to ensure effective implementation of these recommendations.

It is anticipated that the earliest possible date that recommendations could be implemented is in time for Financial Year 2022, with this requiring approval in principle of budgets in mid-2021, in order for implementation ready for January 2022. Given that school budgets align to Jersey Financial Years (calendar years), the implications of not delivering to this timescale would be that the new funding model would not be implemented until Financial Year 2023, impacting the later portion of Academic Year 22/23 and the Academic Years 23/24 onwards. This timeline is summarised in Figure 4 below.

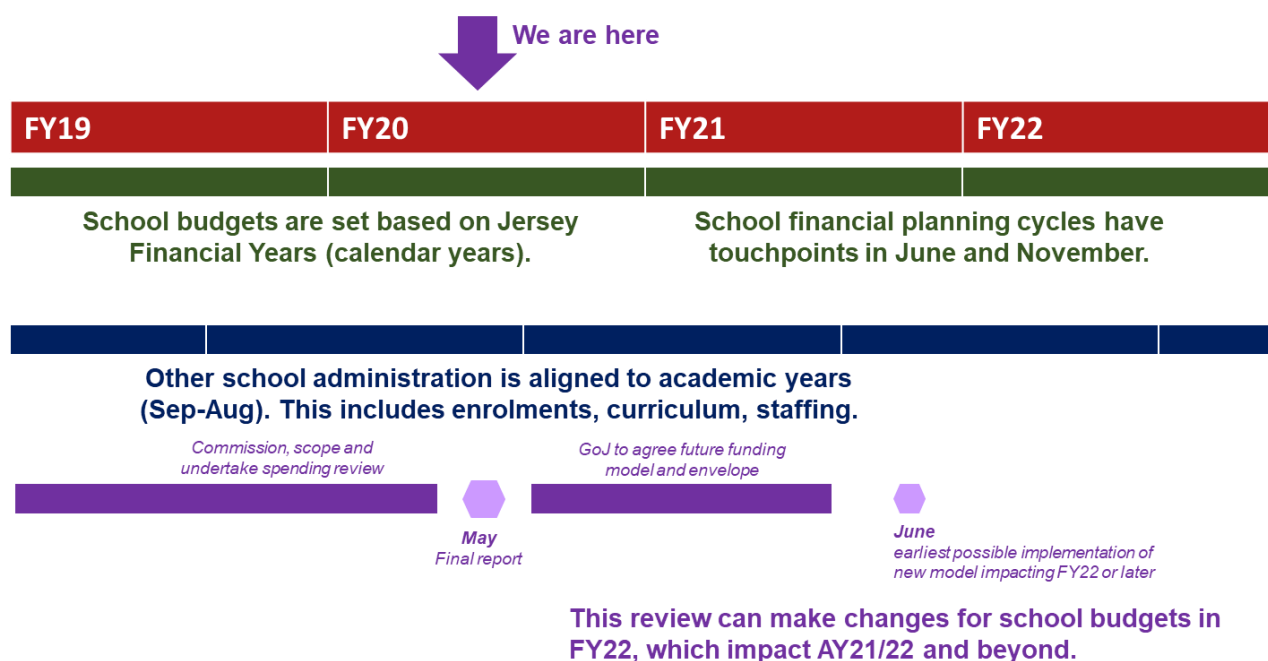


Figure 4 Indicative timeline for implementation

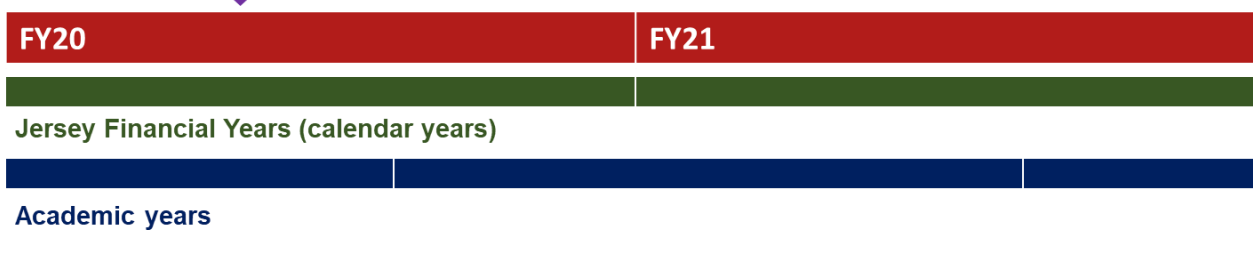
Following from the Independent School Funding Review, there will be an implementation phase to agree, build and transition to the new model. This will incur a cost due to the time required to deliver change within the education system and will require rigorous delivery planning.

These delivery plans would likely include the below components:

- Presentation to the Council of Ministers and preparation of materials within CYPES
- Approval of any new funding model for Jersey's education system, including agreeing source of funds for any increase in overall budget requirements

¹² See Section 4 of the main report for recommendations.

- Development of a fully functional working system to calculate allocations to schools using a new funding model – this cannot be finalised until the new funding model is approved, through some work could begin when there is reasonable confidence that a new model will be agreed.
- Supporting the implementation of a new model at a school and college level, including providing clear and transparent information about the new approach and expectations for users. This includes establishing a system of finance support for schools, including business managers, “teach-ins” and allowing schools to hold financial reserves.
- Supporting transformation and change at a central, CYPES level, including considering the implications for the roles of core team members currently involved in the delivery of the funding model.
- In the longer-term, assessing the viability and desirability of significant policy changes, including impact assessment and consultation.

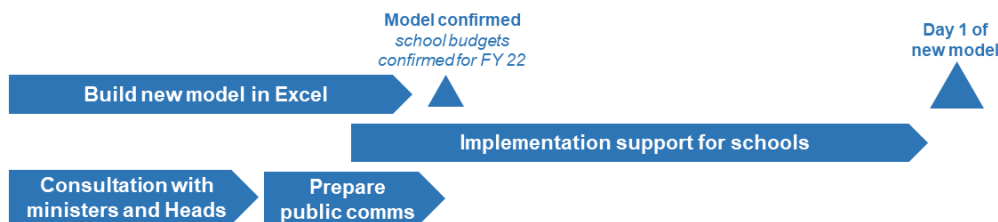


Indicative implementation phasing

APPROVAL OF APPROACH



IMPLEMENTATION



LONGER-TERM POLICY OPTIONS



Figure 5 Indicative implementation phasing

As part of the package of recommendations going to CoM in Summer 2020, there should be an articulation of the implementation approach, including the time and financial costs associated with delivery of the recommendations proposed for approval. CYPES will need to be resourced appropriately to ensure effective implementation of these recommendations. The implementation considerations have been scoped at a high level as part of this review, and the results are summarised in Figure 5. This is set out on the assumption that CoM is working towards approval of a new funding model ready for implementation by FY22 (the earliest possible implementation date). Detailed delivery plans to be developed following agreement of implementation timescales.

6. Further detail on proposed new funding model

6.1. Assessment of the current state funding formula

The current formula, explained in Section 5.6 of the report, exemplifies extreme cost-matching principles, which aim to provide schools with an accurate line-by-line allocation providing for the cost of operating a school. This is evident through the structure of the formula itself: core personnel are provided at cost¹³, and there are several examples of highly specific costs being provided to schools (for example, a 'school crossing patrol allowance'). Schools do not hold reserves, or carry forward underspends, meaning that they are fully reliant on the formula to provide them with the full operational costs of running.

Whilst in theory this approach provides an accurate and fair method of funding a system, in practice cost matching has given rise to two fundamental problems in Jersey. Firstly, it struggles to manage increasing diversity in schools, and secondly, it opens the system up to amendment in a way that may drive inequity in the system, rather than reduce it.

Managing change in the system

Schools have diversified in a number of ways over the course of the last decade, including but not limited to:

- School populations and characteristics
- Estates
- Personnel requirements, driven both by the changing needs of the school population, and by legislation (e.g. GDPR)

The result of these changes is schools with increasingly diverse needs and requirements. As a result, a funding formula which aims to provide precise cost-matching then has to treat different schools differently, and – as is evidenced in the formula – a number of additions and adjustments have arisen to cater to this diversity.¹⁴ This level of diversity within the funding formula itself is one of the main drivers of its complexity, and, in turn, this drives its perceived lack of transparency. A simplified formula is required, one which is able to scale and adapt without requiring numerous adjustments in order to respond to situational change.

¹³ Primary non fee paying formula only: Heads and Deputies are provided at cost, while in the Secondary and fee-paying formula, an adjustment is provided for the actual cost of a Head and Deputy

¹⁴ Examples of these adjustments include: an adjustment for premises condition, an adjustment to cover actual staff cost based on the average grade of staff in a school, First Aid costs allocated to schools at custom rates (Primary only), and a Secretary cost adjustment for large schools (Primary only)

School specific amendment to the formula

There are multiple examples of individual school-based adjustments in the formula.¹⁵ Because of Jersey's scale, communication with the Education Finance function is not only possible but a fundamental part of Jersey's centralised school support system. Because of this, schools are in a position where it is possible to request or negotiate adjustments to the formula. As a system structure, this is problematic for two reasons:

- It suggests that schools who have either more resource, or more knowledge of the formula may have more influence over the workings of the formula than other schools, which ultimately reduces equity in the system
- It may encourage poor budgeting practices and financial management, as the option to request a cost is covered by the formula is available to financial planners in schools.

A formula is required which does not provide the option for additional adjustments, and must therefore be both robust and flexible enough to cover the aspects which are currently addressed by ad hoc additions or adaptations to the formula.

6.2. Proposed new funding formula

As discussed in Section 4.2 of the report, our proposed funding formula will follow the high-level structure in Figure 6 below, including:

- **Core Allocation:** covering the fixed and variable costs required to operate a school
- **Pupil Need:** additional funding based on cohort characteristics and individual needs
- **School Need:** additional funding for premises condition, or for other services such as Additional Resource Centres
- **System Need:** the governance underpinning robust financial management

¹⁵ Examples of these adjustments include: an adjustment provided to Hautlieu to offset the fact that it does not receive a share of the SEBD (Kathie Bull) fund, a 'school crossing patrol allowance' for some schools, Direct Cleaning costs for some schools, and further adjustments for premises based on additional maintenance costs such as car parks

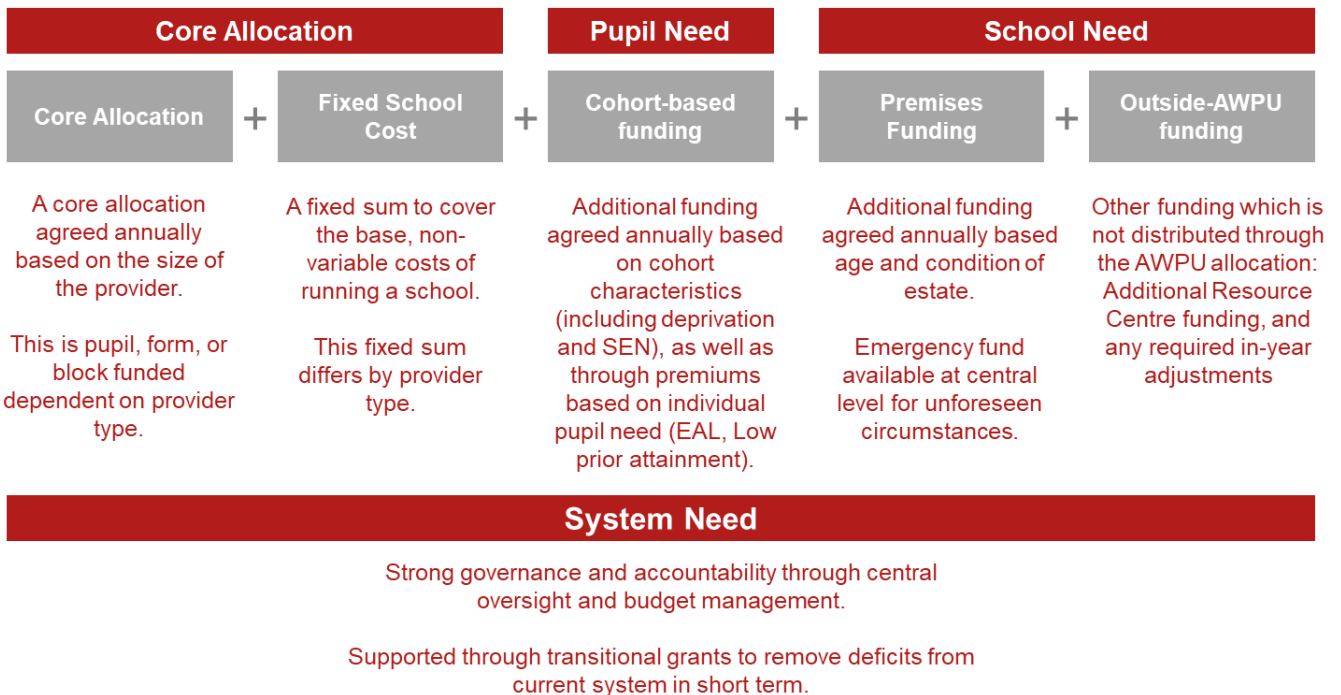


Figure 6 Proposed high-level funding model for Jersey mainstream schools

A more granular view of how this will be calculated in our proposed formula is illustrated in Figure 7 below.

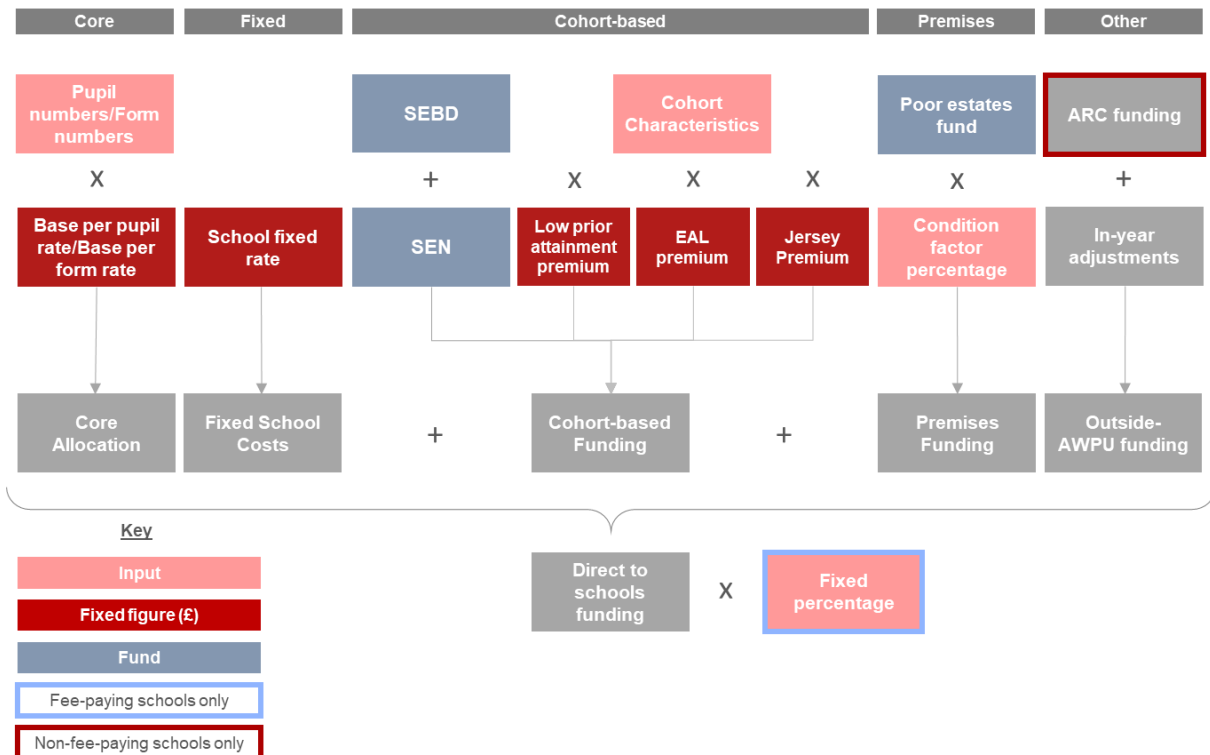


Figure 7 Detailed picture of the proposed funding model for mainstream schools. Fee paying schools' funding is calculated in the same way as Government schools' funding then reduced to a fixed percentage

6.2.1. Summary of the proposed changes

All schools

- **Fixed school funding:** Schools' fixed costs will be simplified and reduced to one flat rate for Primaries and for Secondaries: the reduction will be reallocated to uplift per pupil or per-form base rates.
- **Premises funding:** Premises costs will be reduced and reallocated to uplift per pupil or per-form base rates; a fund will be retained to cover the estates with the greatest maintenance needs. The cost of grounds maintenance will be transferred to the centre and the current contracts paid at cost.
- **Adjustments:** Adjustments will be removed from the formula, and the reduction absorbed by the per-pupil or per-form base rates.¹⁶
- **Uplifted SEN fund:** The SEN fund will be combined with the current SEBD fund and uplifted through reallocation of the current formula's adjustment payments, along with a further uplift to maintain SEN funding as a proportion of all funding flowing directly to schools (see recommendation 3).
- **Additional Premiums:** Premiums will be included for low prior attainment, and for EAL. These will be available for fee-paying and non-fee-paying schools (both maintained and non-maintained). EAL and Low Prior Attainment will therefore be removed as indicators for SEN in the division of the SEN fund.
- **Additional available funding:** Additional funding will be available to schools from the centre as per our recommendations. This includes: specialist training for Mental Health and Well Being, Teacher Development Funding, funded School Business Managers at cluster level, uplifted funding for pupils with Records of Need.¹⁷
- **Reserves:** Schools will be able to hold reserves and carry forwards, encouraging greater budget discipline, and granting schools greater autonomy over their budgets.

Special Schools

- **Block funding:** Special schools will be funded through a block, assuming a fixed number of pupils, and operation at capacity.

Non-fee-paying Primary Schools

- **SEBD funding:** The current SEBD fund will be made available to Primary Schools and combined with the SEN pot currently divided among schools. EAL and Low Prior Attainment will be removed as indicators of SEN (due to additional premiums being introduced), and pupils with SEBD need will be included in the division of this fund.

¹⁶ This will include the Actual Staff Cost Adjustment, Corporate Efficiency Adjustment, Adjustment for Occupational Health, Premises Adjustments, Additional Staffing Allocation

¹⁷ Section 4.4 of the report provides an explanation of recommendations in full, including estimated costings

Non-fee-paying Secondary Schools

- **SEN funding:** Secondaries will be brought on to the same SEN funding allocation method as the Primaries, basing ENCO and division of the SEN pot on school cohort characteristics.
- **SEBD funding:** The current SEBD pot will be combined with the SEN pot, including pupils with SEBD need as factors in the division of the fund.

Fee-paying maintained and non-maintained Primary Schools

- **Per form base rate:** Fee-paying Primary schools will be moved on to a per form formula.
- **SEN funding:** Fee-paying Primaries will receive a share of the SEN fund, allocated according to the same criteria as the non-fee-paying schools.

Fee-paying maintained and non-maintained Secondary Schools

- **SEN funding:** Fee-paying Secondaries will receive a share of the SEN fund, allocated according to the same criteria as the non-fee-paying schools.

7. Glossary

Term	Meaning
ARC	Additional Resource Centre – <i>These are specialist centres for students with additional needs, provided as centres attached to mainstream providers.</i>
AWPU	Age-weighted Pupil Unit – <i>This is the central formula used to allocate funding to schools. For more detail see Section 5 of the main report.</i>
AY	Academic Year
CAMHS	Child and adolescent mental health services
CoM	Council of Ministers
CPD	Continuing professional development
CYPES	The Department for Children, Young People, Education and Skills
EAL	English as an additional language
EY	Early Years – <i>Early Years Foundation Stage sets learning and development standards for children from 0 – 5 years</i>
FTE	Full time equivalent
FY	Financial Year – <i>This means Jersey Financial Years which align with Calendar Years (Jan – Dec).</i>
GCSE	General Certificate of Secondary Education
GDP	Gross Domestic Product
GDPR	General Data Protection Regulation
GoJ	Government of Jersey
GST	Goods and services tax
HR	Human Resources
ITT	Invitation to Tender
JP	Jersey Premium – <i>This refers to a targeted funding programme for schools which has been introduced to help all children get the very best from their education. This specifically targets socio-economic equality.</i>
JPH	Jersey Property Holdings
KS1	Key Stage 1 - Year 1 – 2 (ages 5 – 7)
KS2	Key Stage 2 - Year 3 – 6 (ages 7 – 11)
KS3	Key Stage 3 - Year 7 – 9 (ages 11 – 14)
KS4	Key Stage 4 - Year 10 – 11 (ages 14-16)
KS5	Key Stage 5 - Year 12 – 13 (ages 16 – 18)
NEET	Not in education, employment or training

OECD	The Organisation for Economic Co-operation and Development
PISA	The Programme for International Student Assessment - <i>This is a worldwide study run by the OECD to evaluate educational systems.</i>
PPP	Purchasing Power Parity – <i>This is an adjustment made in order to allow for prices to be compared between different countries, for example accounting for the fact that the cost of living in Jersey is comparatively high.</i>
PSHE	Personal, Social, Health and Economic education – <i>This is part of the existing curriculum focussing on developing the knowledge and skills to keep children and young people safe and healthy.</i>
SEBD	Social, emotional and behavioural difficulties
SEN	Special educational needs
SEMH	Social, emotional and mental health needs
SEMHIT	Social, emotional and mental health inclusion team