



SCHOOLS FUNDING FORUM AGENDA

8.30 am

Thursday
11 July 2013

CEME, Rainham

MEMBERSHIP:

Members: 26 Quorum: 10

Head Teachers (12):

Nigel Emes (Chair) (Primary)
Margy Bushell (Primary)
Christine Drew (Primary)
Chris Hobson (Primary)
Ian Trafford (Primary)
Angela Winch (Primary)
Emma Field (Primary Academy)
Julia Deery (Secondary)
Julian Dutnall (Secondary Academy)
Alan Perry (Secondary Academy)
Keith Williams (Secondary Academy)
Geoff Wroe (Special)

Governors (7):

Joe Webster (Vice Chair) (Secondary)
Sheila Clarke (Primary)
John Parker (Primary)
Richard Shaw (Primary)
Tracey Walker (Primary)
Daniel Gricks (Secondary Academy)
John McKernan (Secondary Academy)

Pupil Referral Units (1)

Vacancy

**Non-School
Representatives (4):**

Rob Fox (Diocesan Board of Education)
Trevor Sim (Vulnerable Children)
Maria Thompson (14-19 Partnership)
Katrina Karwacinski (Early Years PVI Sector)

Trade Unions (3):

Keith Passingham (NASUWT)
Dave Thomas (UNISON)
Ray Waxler (NUT)

Please contact David Allen david.allen@haverling.gov.uk Tel: 433851 to give apologies for absence or to raise queries on the agenda.

AGENDA ITEMS

1 APOLOGIES FOR ABSENCE AND ANNOUNCEMENT OF SUBSTITUTE MEMBERS OR OBSERVERS

2 TO AGREE THE NOTES OF THE MEETING HELD ON 25 APRIL 2013 (Pages 1 - 4)
The notes are attached at Appendix A.

3 MATTERS ARISING

4 SCHOOL BALANCES 2012-13 (Pages 5 - 6)

School Balances at year ended 2012-13 are attached at Appendix B. An analysis of the balances will be presented at the meeting.

5 DSG OUTTURN 2012-13 (Pages 7 - 8)

The balance at closure of accounts for the DSG centrally retained areas was £2.914m. This includes some prior year commitments which, along with proposals for use of the balance, are set out at Appendix C.

6 PUPIL GROWTH CONTINGENCY (Pages 9 - 16)

- (i) The criteria previously agreed for funding pupil growth requires amendment to include the requirement to fund a full year for growth in academies (rather than September to March for maintained schools). Issues have also arisen in the setting up of new classes in primary schools. Appendix D refers.
- (ii) At the start of the year it was agreed to hold £1m as a contingency to fund pupil growth. The Funding Forum should be kept informed of how this contingency is allocated. See Appendix E. It is recommended that the contingency for 2013-14 is increased by £700,000 from the DSG carry forward from 2012-13.
- (iii) Funding for 2014-15 and future years should take into account the need to fund set up costs for new schools opening to meet basic need.

7 FUNDING CHANGES (Pages 17 - 18)

The changes to the Schools Funding Arrangements for 2014-15 were announced in June. A summary is attached at Appendix F.

Full information can be found on the DFE website.

<http://www.education.gov.uk/schools/adminandfinance/financialmanagement/schools/evenuefunding/a00221523/school-funding-and-high-needs-funding-arrangements-2014-15>

8 LOW COST HIGH INCIDENCE SEN

The £6,000 per pupil with SEN is now a mandatory threshold for identification of SEN funding in the budget shares of schools and academies. Additional funding may be provided outside the main funding formula on a consistent and fair basis where the number of high needs pupils cannot be reflected adequately in formula funding. Additional funding can also be provided where there is a disproportionate number of pupils with a particular type of SEN.

To be discussed at the meeting.

9 SUPPORT TO SCHOOLS WITH FALLING ROLLS (Pages 19 - 20)

It is proposed to create a fund to cover temporary falling rolls in maintained secondary schools and academies. The proposed criteria is attached at Appendix G.

10 EXCEPTIONAL PREMISES FACTOR AND DISAPPLICATION OF THE MINIMUM FUNDING GUARANTEE

To consider any proposals from the LA.

11 NEXT MEETINGS (Pages 21 - 22)

Proposals for meeting dates for the 2013/14 academic year are attached at Appendix H.

12 ANY OTHER BUSINESS

This page is intentionally left blank

**MINUTES OF A MEETING OF THE
SCHOOLS FUNDING FORUM
CEME, Rainham
25 April 2013 (8.30 am - 9.35 am)**

Present:

Headteachers: Nigel Emes (Chair) (Primary)
Margy Bushell (Primary)
Alison Dowding (Primary) (substituting for Christine Drew)
Chris Hobson (Primary)
Glenn Lucas (Primary) (substituting for Angela Winch)
Emma Field (Primary Academy)
Alan Perry (Secondary Academy)
Keith Williams (Secondary Academy)
Geoff Wroe (Special)

Governors: Joe Webster (Secondary)
Sheila Clarke (Primary)
Tracey Walker (Primary)
John Parker (Special)
John McKernan (Academy)
Daniel Gricks (Academy)

**Non-School
Representatives:** Katrina Karwacinski (Early Years PVI/Sector)
Trevor Sim (Vulnerable Children)
Maria Thompson (14-19 Partnership)

Trade Unions: Keith Passingham (NASUWT)
Dave Thomas (Unison)
Ray Waxler (NUT)

Apologies were received for the absence of Angela Winch (Primary) (substituted by Glenn Lucas) Christine Drew (Primary) (substituted by Alison Dowding) and Julia Deery (Secondary).

The Chairman reminded Members of the action to be taken in an emergency.

45 MEMBERSHIP

The Forum welcomed Katrina Karwacinski, the new representative of the Early Years/PVI Sector.

46 TO AGREE THE NOTES OF THE MEETING HELD ON 21 MARCH 2013

It was noted that the date of the notes of the previous meeting on page one (item 40) of the minutes should read 24 January 2013 rather than as stated. The Forum otherwise approved the notes of the meeting held on 21 March 2013.

47 **MATTERS ARISING**

It was clarified that the agreement of secondary head teachers from academies on trade union facility time was for the financial year. Benchmarking data with other Councils on this area would be brought to a future meeting.

48 **2013-14 FUNDING FORMULA COMPARATIVE DATA**

The Forum considered comparative data for each of the funding factors, as compared to other Local Authorities. Large gains in the funding of some schools' funding arising from the application of the new formula had been capped at 2% plus 12.5% of the remaining gain but no school could lose by more than 1.5% per pupil. The position in the current year would inform the formula for 2014/15.

It was noted that the amount capped reduced under the model over time until a school was on formula. Further modelling would however be undertaken on this area and brought to a future meeting of the Forum. The Forum also noted that a new national funding formula was expected for 2015-16. By 2014-15, both the level of capping and the Minimum Funding Guarantee would reduce as more schools were on formula but there would still be an overall cost of £836,000.

Havering's unit funding per pupil was approximately £4,000 for primary and £5,500 for secondary against the DFE unit funding to Havering of £4,727. An increase in the primary roll may therefore increase the funding available. Further work was needed on this. There were currently 15 schools on protection, 41 schools capped and 21 schools unaffected by caps or protection. More schools would be unaffected in the future as they became on formula but this would cost more overall.

As regards comparative data, Havering was midway of 19 other London Local Authorities for number of primary pupils and amount spent. At KS3 however, Havering was ranked 4th on value, 6th for number of pupils, 4th on expenditure and 2nd for proportion of funding. It was suggested the Forum could therefore consider moving some of this funding to other factors. Havering was also second highest for its proportion of funding at KS4.

As regards deprivation factors, Havering was ranked midway for free school meals and for the total spend on deprivation as a proportion of funding.

Looked After Children was not currently used as a factor by Havering although it was in other boroughs and some modelling would be done on this. Havering was below average at primary level for SEN factors based on attainment but ranked midway of the 19 Local Authorities at secondary level. Bexley used a very high allocation per pupil for this factor and officers could try and obtain information from Bexley on the outcomes of this expenditure.

Havering was ranked low for use of English as an additional language and midway on the mobility factor. The retained growth figure for primary expansion was relatively low but this was likely to rise in 2014/15 and modelling would be undertaken on this. Further models and options for making the formula more realistic would be brought to a future meeting of the Forum.

The Forum thanked David Allen for his work on this area and noted the presentation.

49 **SECTION 251 BUDGET STATEMENT 2013-14**

The Forum was advised that the Local Authority was required to produce a statement detailing its planned expenditure on children's services. This was a public document and would be available on the Council's website. The Forum would be advised when the document was published. The draft statement detailed the individual schools budget for early years, primary, secondary and special schools. Academies were funded on the same formula.

The statement also detailed items such as contingencies for schools in financial difficulties, behaviour support and insurance. These budgets were held centrally but it was noted that the Forum would need to decide these levels again for 2014/15. Also listed was an exception that had been agreed by the Secretary of State – funding for copyright licensing agreements.

Other (non DSG) areas listed were funded by the revenue support grant or via Council Tax. Some of these areas reduced with each conversion of a school to an Academy since Academies took on these budgets directly. Some areas had also reduced their budgets due to the closure of some Children's Centres. The statement gave the total budget for the service as approximately £228 million.

The Committee noted the draft statement and that the final version would be published on the Council's website shortly.

50 **HIGH NEEDS PUPILS**

It was explained that a process was developing on how Local Authorities charged each other for high needs pupils placed by other Councils. A pro forma for this purpose was presented to the Forum that would allow payments from other Local Authorities by BACS on the 15th day of each month. David Allen and Trevor Sim were meeting to develop the process for schools and final versions would be circulated in due course.

Funding consisted of a top up allocation based on an hourly rate of £12.66 per hour. For schools with special units, funding was the cost of the unit less £10,000 per place via the agreed formula. Special schools in fact had relatively few children from outside Havering.

It was also noted that a new Gateway Manager had been appointed by East London Solutions to work across the five East London boroughs to ensure commissioning and pricing structures were equitable across all the boroughs.

The Forum noted the position.

51 **NEXT MEETINGS**

The next meetings had been arranged as follows:

2013

May Thursday 23rd

July Thursday 11th

Both meetings to be held at CEME at 8.30 a.m. It was noted that a new venue, preferably a school with sufficient parking facilities, would be needed from September onwards.

52 **ANY OTHER BUSINESS**

There was no other business raised.

Chairman

Agenda Item 4

APPENDIX B

Schools Funding Forum 11th July 2013

School carry-forward balances 2012-13

	Revenue Fund 01	Capital Income Fund 60	School Travel Plan Fund 61	Devolved Capital Fund 63	Total Capital	Grand Total
Primary						
2007	Ardleigh Green Infant	106,061		7,038	7,038	113,099
2006	Ardleigh Green Junior	104,918		0	0	104,918
2009	Benhurst Primary	171,070		30,364	30,364	201,434
2078	Brady Primary	3,212		9,384	9,384	12,596
3509	Branfil Primary	-33,900		18,983	18,983	-14,917
2081	Broadford Primary	20,591		1	1	20,592
2036	Brookside Infant	56,706		13,366	13,366	70,072
2035	Brookside Junior	224,320		11,995	11,995	236,315
2038	Clockhouse Primary	395,622		32,205	32,205	427,827
2097	Crowlands Primary	310,475		17,935	17,935	328,410
2042	Crownfield Infant	153,488		15,128	15,128	168,616
2041	Crownfield Junior	73,593		2,454	2,454	76,047
3000	Dame Tipping C.E. Primary	3,170	3,270	20,290	23,560	26,730
2008	Elm Park Primary	17,236		17,208	17,208	34,444
2094	Engayne Primary	325,422	284	1,610	1,894	327,316
2069	Gidea Park Primary	286,515		18,627	18,627	305,142
2015	Hacton Primary	246,133		62,023	62,023	308,156
2017	Harold Court Primary	157,486		34,225	34,225	191,711
2005	Harold Wood Primary	94,548		7,578	7,578	102,126
2090	Hilldene Primary	396,713		164,491	164,491	561,204
2014	Hylands Primary	334,205	735	17,574	18,309	352,514
3502	La Salette Catholic Primary	89,252	7,468	0	7,468	96,720
2019	Langtons Infant	124,507		17,435	17,435	141,942
2018	Langtons Junior	60,471		585	585	61,056
2087	Mead Primary	319,441		84,752	84,752	404,193
2086	Nelmes Primary	108,279		-1	-1	108,278
2084	Newtons Primary	93,390		1,169	1,169	94,559
2056	Parklands Infant	198,438		0	0	198,438
2055	Parklands Junior	132,534		9,729	9,729	142,263
2073	Parsonage Farm Primary	369,324		86,584	86,584	455,908
2091	Pinewood Primary	267,270		0	0	267,270
2085	Pyrgo Priory	33,621		0	0	33,621
2089	Rainham Village Primary	181,528		16,906	16,906	198,434
2060	Rise Park Infant	42,749		8,699	8,699	51,448
2059	Rise Park Junior	74,990		17,193	17,193	92,183
2023	Scargill Infant	78,713		0	0	78,713
2022	Scargill Junior	141,849	1,106	25,416	26,522	168,371
2080	Scotts Primary	97,772		13,682	13,682	111,454
2062	Squirrels Heath Infant	125,852		45,899	45,899	171,751
2061	Squirrels Heath Junior	219,699		20,076	20,076	239,775
3508	St. Alban's Catholic Primary	57,513		0	0	57,513
3301	St. Edward's CE Primary	401,510		0	0	401,510
3506	St. Joseph's Catholic Primary	97,749		0	0	97,749
3501	St. Mary's Catholic Primary	149,800		0	0	149,800
3503	St. Patrick's Catholic Primary	443,709	267,657	0	267,657	711,366
3507	St. Peter's Catholic Primary	35,339		0	0	35,339
3505	St. Ursula's Catholic Infant	115,608		0	0	115,608
3504	St. Ursula's Catholic Junior	97,021		0	0	97,021
2024	Suttons Primary	185,714	2,000	43,264	45,264	230,978
2003	The James Oglethorpe Primary	47,818		10,354	10,354	58,172
2092	The Mawney	154,267	10,000	14,903	24,903	179,170
2093	The R J Mitchell Primary	104,117		13,074	13,074	117,191
2070	Towers Infant	-11,659		14,700	14,700	3,041

	Revenue Fund 01	Capital Income Fund 60	School Travel Plan Fund 61	Devolved Capital Fund 63	Total Capital	Grand Total
2076 Towers Junior	67,686			3,800	3,800	71,486
2067 Upminster Infant	113,072			50,826	50,826	163,898
2066 Upminster Junior	89,167			21,687	21,687	110,854
2026 Whybridge Infant	29,263			194	194	29,457
2025 Whybridge Junior	23,587			115	115	23,702
2096 Wykeham Primary	56,905			1,238	1,238	58,143
Total Primary	8,465,449	285,125	7,395	1,024,758	1,317,278	9,782,727
Secondary						
4042 Bower Park	48,350			0	0	48,350
4026 Gaynes	195,455			16,708	16,708	212,163
4037 Marshalls Park	77,882			408	408	78,290
4011 The Chafford School	775,058			11,520	11,520	786,578
5400 The Frances Bardsley School	468,404			6,752	6,752	475,156
4025 The Royal Liberty	226,200		7,865	10,112	17,977	244,177
4009 The Sanders Draper	305,967			130	130	306,097
Total Secondary	2,097,316	0	7,865	45,630	53,495	2,150,811
Special						
7000 Corbets Tey School	457,600			7,274	7,274	464,874
7002 Dycorts	154,883		3,709	34,400	38,109	192,992
7003 Ravensbourne	288,414			393	393	288,807
Total Special	900,897	0	3,709	42,067	45,776	946,673
Total All Schools & Academies balances at point of conversion	11,463,662	285,125	18,969	1,112,455	1,416,549	12,880,211
Total All Schools without Academies balances at point of conversion	10,290,048	285,125	11,104	1,074,549	1,370,778	11,660,826

Agenda Item 5

APPENDIX C

Schools Funding Forum 11th July 2013

USE OF DSG CARRY FORWARD FROM 2012-13

The carry forward balance from centrally retained DSG from 2012-13 into 2013-14 is £2.914m.

	£000
Unallocated Single Status funding from previous year c/fwd (5 schools)	110
Unallocated contingency funding from previous year c/fwd (5 schools)	140
Exclusions & managed moves balance for allocation to Pupil Referral Service	30
Contribution to pension deficit	300
Additional funding to accommodate in year pupil growth	700
Prior year Business Rates adjustments	95
Distribution to schools	1,539
Total	2,914

This page is intentionally left blank

REVIEW OF PUPIL GROWTH AND INFANT CLASS CRITERIA

The following sets out the current arrangements for supporting schools in meeting the cost of setting up additional classes as agreed by the Schools Funding Forum at the meeting dated 6th December 2012. Some of the guidance from the DFE has changed for 2014-15 and in operating these arrangements it has become apparent that they do not cover all circumstances. The proposed amendments are marked in *italics*.

PUPIL GROWTH AND INFANT CLASS SIZE CONTINGENCY

DFE operational guidance to local authorities to assist in the implementation of the school funding reforms includes arrangements for funding that can be held centrally before the formula allocation to schools is calculated.

This includes funding for significant pupil growth and funding for additional classes needed as a consequence of infant class size regulations. The requirements are that:

- a. the growth fund can be used only for the purposes of supporting growth:-
~~in pre-16 pupil numbers to meet basic need and to support additional classes needed to meet the infant class size regulation;~~
 - (i) where a school or academy has agreed with the authority to provide an extra class in order to meet basic need in the area (either as a bulge class or as an ongoing commitment).
 - (ii) where a school has increased its PAN by X (15) or more pupils in agreement with the authority.
 - (iii) where a school has extended its age range in agreement with the authority.
 - (iv) Pre-opening costs / initial equipping allowance for new maintained schools and recoupment academies, including new academies and free schools where the school is opening in response to basic need.
 - (v) for KS1 classes where overall pupil numbers exceed a multiple of 30 by X or fewer pupils. The agreement in Havering is to fund pupils placed in schools which result in class sizes of above 31 pupils. The allocation is based on the cost of a Teaching Assistant, currently £15,124.
- b. the fund must be used on the same basis for the benefit of both maintained schools and recoupment Academies;
- c. any funds remaining at the end of the financial year must be added to the following year's DSG and reallocated to maintained schools and Academies through the local formula;

- d. the local authority will be required to produce criteria on which any growth funding is to be allocated. These should provide a transparent and consistent basis (with differences permitted between phases) for the allocation of all growth funding. The criteria should both set out the circumstances in which a payment could be made and provide a basis for calculating the sum to be paid; and
- e. the local authority will ~~need to propose the criteria to the Schools Forum and gain its agreement before growth funding is allocated. The local authority will also need to consult the Schools Forum on the total sum to be top sliced from each phase and~~ must regularly update the Schools Forum on the use of the funding.

Proposal

The LA considers that a contingency of £1 million should be held centrally for pupil growth and in relation to infant class sizes.

1. Pupil Growth

- 1.1 The following criteria apply to all Havering primary schools and academies, secondary schools and academies and free schools. The funding of growth in special schools and pupil referral units are subject to different arrangements.
- 1.2 Growth in pupil numbers is defined as the difference between the October census on which the school or academy receives its main funding for the following financial year and the October of the next academic year i.e. the first term in which growth will have occurred.
- 1.3 In most cases growth will arise at the request of the LA to address expansions in pupil numbers and although schools will have made commitments for full, or half forms of entry, the additional places may not have been filled. The criteria below will apply to allocate funding irrespective of the number of additional places filled on condition that the school has opened and resourced an additional class.
- 1.4 The October in which the growth will have occurred will also be the census date for the allocation of funding for the school for the following financial year. Therefore, if the additional places have not been filled, the school may have an additional class which is only partially funded through the pupils on roll rather than the numbers for which the additional provision was planned. Contingency arrangements will apply to the “missing” children as described at Criterion 2.
- ~~1.5 In schools that are not full, pupil numbers may increase without planned increases in the admission number. For example, a 6 f.e. secondary school (900 places) may have only 800 on roll. The school may, however, admit into Year 7 more pupils than it is losing in Year 11~~

~~e.g. a net difference of 18. A number should therefore be determined that is considered “significant” and necessitates structural change at the school. Numbers below this trigger point will not be funded, numbers at or above will be funded on the basis set out in Criterion 2 below. The number that is deemed to be significant is 15. Increases due to exclusions and managed moves where money follows the pupil will be taken into account in the calculation of pupil number increases.~~

- 1.6 Planned increases in secondary schools of full or part forms of entry will be funded in accordance with Criterion 1.
- 1.7 For academies, the funding based on the criteria below would need to be for 12/12. This is because the pupil count of October does not apply to academies until the start of their financial year in the following September. The contingency funding would therefore be required for September to March and April to August.

Criterion 1: Planned increase of 1 or ½ f.e. (30 or 15 pupils)

The school will receive additional funding of 7/12 of 90% (primary) or 85% secondary of the Basic Entitlement (BE) relevant to the year group for a maximum of 28 (or 14) pupils.

Example 1 (BE value is for illustrative purposes only)

Primary School Basic Entitlement (BE)	£3,105
Less 10% for non staffing elements of BE	(£310)
Value for in year contingency allocation	£2,795
X 7/12 for September to March	£1,630
X 28 pupils	£45,650
OR	
X 14 pupils for ½ f.e.	£22,825

Criterion 2: Surplus places from a planned increase carried forward into the new financial year

If the additional numbers of places provided are not filled but the school has opened and resourced an additional class, funding will be allocated to the school in the following financial year from the contingency to top up to 28 pupils.

Example 2 (based on a 2 f.e. school expanding to 3 f.e.)

	School roll	
Year 1	420	
Year 2 planned increase	30	
Year 2 expected NOR	450	
Actual NOR	435	
Year 3 funding based on	435	
Contingency funding on	13	(28 – 15)

Primary School Basic Entitlement (BE)	£3,105
Less 10% for non staffing elements of BE	(£310)
Value for in year contingency allocation	£2,795
X 12/12 for full financial year	£2,795
X 13 pupils	£36,335

~~Criterion 3: Unplanned increase in pupils~~

~~The school will receive additional funding of 7/12 of 90% of the Basic Entitlement (BE) relevant to the year group for a maximum of 28 pupils.~~

~~Example 1 (BE value is for illustrative purposes only, growth of 18 pupils is used in this example)~~

Secondary School Basic Entitlement (BE)	£4,486
Less 10% for non staffing elements of BE	(£448)
Value for in year contingency allocation	£4,038
X 7/12 for September to March	£2,355
X 18 pupils	£42,390

2. Infant Class Size Funding

- 2.1 An infant class size factor is not included in the range of factors an LA may use in applying its formula to distribute funding to its schools. The Infant Class Size Regulations continue to apply and it is permitted to make additional provision in schools from a centrally held contingency.
- 2.2 Classes can exceed 30 in very limited circumstances but given a lack of physical capacity in schools to open an additional class, surplus accommodation having been used to support the primary expansion programme, other strategies are used to lower the impact of larger classes. This may, for example, be smaller group work which would require additional resources.
- 2.3 It is considered that in the majority of schools, classes of 31 can be accommodated without the need for additional resources but once

numbers increased to 32, head teachers may need to introduce other strategies.

Funding will therefore be allocated to schools when class sizes exceed 31. This will be based on the average cost of a Teaching Assistant for 27.5 hours per week for 39 weeks per year. The current average cost is £15,124.

A school with a class size of 32 in September, for example, would receive 7/12 (September to March) of £15,124 = £8,822. This would then be reconsidered in the new financial year when account would be taken of the funding that the school will have received in its budget for the additional pupils.

This funding will be allocated for each class above 31 e.g. a 3 f.e. school with three classes of 32 in Yr R in September would receive £8,822 x 3 to support the additional costs.

- 2.4 The primary expansion programme will lead to a number of Havering's 1½ f.e becoming 2 f.e. but for those remaining, an additional class is required in the Reception year. This is because an admission number of 45 requires two classes of 22 and 23; pupil numbers which are insufficient to fund the staffing and other costs of running the two classes. Additional funding will therefore be allocated for ½ and 1½ and 2½ f.e. as for the contingency Criterion 1 above, grossed up to 12/12 for the full financial year.

This would provide a 2½, 1½ or ½ f.e. school with an additional £39,128.

3. Surplus funds

Any funding in the contingency budget unspent by the end of the financial year will carry forward and be allocated to all schools and academies in the following financial year on the basis of pupil numbers. This will be in addition to the schools' annual budget as calculated by the funding formula.

This page is intentionally left blank

PUPIL GROWTH CONTINGENCY

Permanent and in year expansions from September 2013

School	Year Grp	Increase	Previous Year Expansion additional places	additional classes	Cost £	Year Grp	Increase	Permanent Expansion additional places	additional classes	Cost £	Year Grp	Increase	additional places	additional classes	Cost £
Branfil Primary						R	60 - 90	30	1	45,650	R	45 - 60	15		
Broadford						R	45 - 60	15	1	45,650	R	45 - 60	15	1	45,650
Crowlands Primary						R	75 - 90	15			R	75 - 90	15		
						R	75 - 90	15	1	45,650	R	75 - 90	15	1	45,650
						R	75 - 90	15	1	45,650	R	75 - 90	15	1	45,650
Gidea Park Primary	6	45 to 60	15	1	22,825										
Harold Court Primary						R	45 - 60	15	1	45,650					
Harold Wood Primary	4	45 to 60	15	1	22,825										
Hyland Primary						R	60 - 90	30	1	45,650					
Mead Primary						R	60 - 90	30	1	45,650					
Neimes Primary															
Newtons															
Parsonage Farm						R	60 - 90	30	1	45,650					
Pinewood Primary						R	30 - 60	30	1	45,650					
Pyrgo Priory	R	45 - 60	15	1	45,650										
Rainham Village						R	60 - 90	30	1	45,650					
Rise Park Infant						R	60 - 75	15	1	45,650					
Rise Park Junior						R	75 - 90	15	1	0					
Scargill Infant						R	90 - 120	30	1	45,650					
Squirrels Heath Infant						R	90 - 120	30	1	45,650					
Squirrels Heath Junior						R	90 - 120	30	1	45,650					
						R	90 - 120	30	1	45,650					

School	Previous Year Expansion		Cost
	Year Grp	Increase	
St. Patrick's Primary			
Suttons			
The Mawney	2	30 to 60	45,650
Towers Infant			
Whybridge Junior			
Wykeham Primary			

Sub totals 136,950

Total pupil growth in primary

1,438,018

Year Grp	Increase	Permanent Expansion		Cost
		additional places	additional classes	
4	45 to 60	15	1	45,650
R	60 - 90	30	1	45,650
R	60 - 90	30	1	45,650

502,150

Year Grp	Increase	Bulge Classes		Cost
		additional places	additional classes	
R	30 - 60	30	1	45,650
1	30 - 60	30	1	45,650
1	45 - 60	15	1	45,650
2	45 - 60	15	1	45,650
4	60 - 75	15	1	45,650

increases 24 19 798,875

Infant Class Size Funding

School	PAN	Summer term 2013		£
		Yr1	Yr2	
Brookside Infant	60	63		6,302
Mead Primary	90	94		6,302
Pyrgo Primary	64	64		7,562
Rainham Village Primary	63		63	6,302
Scotts Primary	32	32		6,302
The R] Mitchell Primary	32	32		5,041

Total Infant Class Size 37,811

Secondary planned increase from previous year

School	Previous PAN	Current PAN	Year	Increase	£
Marshalls Park	157	172	2007	15	33,854
Redden Court	125	150	2011	25	96,725

Sept'13 - March'14
Sept'13 - Aug'14

Total secondary 130,579

TOTAL

1,606,408

SCHOOL FUNDING REFORM – CHANGES FOR 2014-15

The structure of the 13-14 reform remains in place

The simplified local formula is still at the centre of the system

There is still a closely limited set of factors that can be used in the school formula distribution

The high needs system remains broadly as in 13-14

The changes being introduced for 14-15 are relatively minor

The minimum funding guarantee continues at -1.5% per pupil with the same exclusions + sparsity

Principal changes for 2014 -15

One new factor – an allowance for sparsity, aimed at supporting necessary small schools, mainly in rural areas. Maximum value is £100,000.

Lump sum – LAs can now choose to have different lump sums for primary and secondary schools

The lump sum is capped at £175,000

Where two schools amalgamate the new school will receive 85% of the total of the lump sums of the predecessors for the next full year

The Looked After Children factor must now apply to any child who has been in care for at least one day during a specified period

The prior attainment factor has changes in its measurement at Early Years Foundation Stage and Key Stage 2. For EYFS it will be not achieving a good level of development for 2013 cohort; for KS2 it is not achieving level 4 in English **or** Maths for all cohorts

The mobility factor is now applied when the number of “mobile” pupils exceeds 10%

The basic entitlement for primary pupils (AWPU) must be at least £2,000 and for secondary pupils (KS3 and KS4) at least £3,000

LAs must ensure that at least 80% of delegated funding is distributed by pupil led factors

For 2014-15 there will continue to be no restraints on the primary/secondary ratio

LAs may create a fund to cover temporary falling rolls in advance of a population bulge – but only for good or outstanding schools or academies

Forum regulations will require one member from an institution providing education to 16 – 19 year olds, other than schools or academies – replacing the 14-19 partnership

The recommendation in 13-14 that authorities delegate sufficient funding to allow schools to meet up to £6,000 of special needs costs; this is mandatory in 14-15

Where additional (SEN headroom) funding (not top-up funding) is given to some schools with disproportionate numbers of high needs pupils the criteria needs to be cleared

High needs places in special units (not the number of pupils in the unit) will be deducted from the pupil roll

For post 16 pupils in special schools and academies the place value will be set at £10,000 in place of the normal post 16 values

Schools Funding Forum 11th July 2013

FALLING ROLLS SUPPORT FUND

As part the funding changes for 2014-15 Local Authorities may create a small fund to support good schools with falling rolls where local planning data show that the surplus places will be needed in the near future.

Proposal based on DFE suggested criteria

Support is available **only** for schools judged Good or Outstanding at their last Ofsted inspection (this is a mandatory requirement).

Surplus capacity as the October count date exceeds 15% of the published admission number in the following year groups:

Financial Year	2014/15	2015/16	2016/17	2017/18	2018/19
Year Group	7	7 & 8	7, 8 & 9	7, 8, 9 & 10	7, 8, 9,10 & 11

Local planning data shows a requirement for at least 90% of the surplus places within the next 5 years

Formula funding available to the school will not support provision of an appropriate curriculum for the existing cohort

The school will need to make redundancies in order to contain spending within its formula budget

Formula for distributing funding:

85% of the appropriate AWPU x per vacant place below 85% of the PAN

e.g.

First Year of Funding

PAN: 192
85%: 163

Year 7 NOR October 2013: 70
Difference between 85% of PAN and Yr7 NOR: 93

93 x KS3 AWPU x 85% (£4,551.86 x 85% = £3,869) = £359,824

Second Year of Funding

PAN: 192
85%: 163

Year 7 NOR October 2014: 120
Year 8 NOR October 2014: 70

Difference between 85% of PAN and Yr7 NOR: 72
Difference between 85% of PAN and Yr8 NOR: 93
165

165 x KS3 AWPU x 85% (£4,551.86 x 85% = £3,869) = £638,398

This page is intentionally left blank

FUNDING TIMETABLE AND SCHOOLS FUNDING FORUM MEETINGS

	Deadline	1 st Choice	2 nd Choice
Deadline for submitting first window requests for: <input type="checkbox"/> MFG exclusions <input type="checkbox"/> exceptional premises factors <input type="checkbox"/> sparsity factors <input type="checkbox"/> Lump sum variations for amalgamating schools <input type="checkbox"/> pupil number variations	30 June 2013		
Deadline for submitting second window requests as above	30 September 2013	Thursday 12 September	Tuesday 17 September
School census day	3 October 2013		
LAs to gain Schools Forum / political approval for provisional 2014-15 funding formula	By mid-October 2013	Thursday 17 October	Tuesday 15 October
Deadline for LAs to submit provisional 2014-15 school budget proforma to EFA	31 October 2013		
LAs estimate their 2014-15 DSG Schools Block allocation from pupil data and factors published by the DFE.	10 December	Thursday 5 December	Tuesday 3 December
DfE confirms DSG Schools Block allocations for 2014-15 (prior to academy recoupment)	18 December 2013		
LAs to gain Schools Forum / political approval for final 2014-15 funding formula	By mid-January 2014	Thursday 16 January	Friday 17 January
Deadline for LAs to submit final 2014-15 school budget proforma to EFA	21 January 2014		
Deadline for LAs to confirm budgets for their maintained schools	28 February 2014	Thursday 13 February	Tuesday 25 February

Dates for the rest of the academic year

Funding Issues 2014-15, Capital Allocation announcement 2014-15, Year end Issues 2013-14		Thursday 20 March	Tuesday 25 March
Section 251 statement 2014-15, LA comparative data		Thursday 24 April	Tuesday 22 April
Hold for urgent issues		Thursday 22 May	Tuesday 20 May
Commence funding cycle for 2015-16		Thursday 10 July	Tuesday 8 July