

## SCHOOLS FORUM

<b>Title:</b>	Revised Schools Pro-forma
<b>Author:</b>	Lea Minnican
<b>Date:</b>	17 <sup>th</sup> January 2014
<b>Decision making / consultative / information:</b>	Decision Making

### Summary of Paper:

1. This paper is the culmination of the work undertaken on the funding formula for schools over the past 6 months. The revised schools funding pro-forma will be used to calculate schools budgets in 2014/15.

### Recommendations

2. Annex A is the revised proposed pro-forma for funding schools in 2014/15. Schools Forum is asked to approve this. This approval will also give delegated responsibility to the chair and vice chair of the forum to approve any minor amendments before the final submission to the DfE by the 22<sup>nd</sup> January.

### Update

3. This paper provides an update following on from funding models and pro-forma's presented to Schools Forum previously. Please see paper presented in October for additional background and further information.
4. The data used in the pro-forma is now based on a national data set to determine the funding. This will be mainly based on October 2013 census. There will be no local flexibility to adjust this data set if errors or omissions are made by schools or DfE.
5. Protection has also been put in place to mitigate schools from losing significant levels of funding as we move to a new formula. This is through a minimum funding guarantee (MFG) that prevents schools from losing no more than -1.5% per pupil and the capping of gains required to fund this protection.
6. The Forum are being asked to approve the pro-forma (Annex A), following on from the version presented and approved in October and noting the changes applied since, which are:
  - Number of pupils - this now reflects the October census data and also takes in to account adjustments for SOR schools using 5/12ths of the Oct 13 roll and 7/12ths of our estimated Oct 14 roll.
  - Adjustments made for High Needs pupils so that they are not double counted in Schools Block.

- Adjustments made to those schools who have rent as a factor, including adjusting the 2013-14 MFG baseline so that they do see the benefit of the rent in 14-15. This will not show on the pro forma but has an impact on the individual schools position.
- Sparsity is included, tapered with a maximum value of £100,000.
- Includes an allocation for Trinity Church of England School which is due to open September 2014.
- Rates updated based on new 14-15 multiplier and most up to date rateable values that we hold. AWPU has been increased by around £15 per pupil in all phases. This is a result of savings on Rates due to schools becoming academies and therefore being in receipt of rate relief and the funding from closed middle schools (block in particular) which would have been in the previous model.
- De-delegation - the centrally retained DSG funding that the forum agreed to de-delegate is now included in the AWPU, before an adjustment is made to remove from the schools budgets.
- Capping of gains – this was set at 3.9% in the previous model. Because the level of DSG and commitments is now known as the census data is available the capping of gains % needed to increase. The cap on gains is now set at 5.15%. The capping and MFG need to be the same in cash terms as the cash saved by capping is used to meet the costs of MFG.

## **Next Steps**

7. If approved by the forum this pro-forma will be submitted to the EFA by the 22<sup>nd</sup> January.
8. The pro-forma will then be used to set maintained budgets for distribution by the 28<sup>th</sup> February 2014. Academy budgets will be set by the EFA using the same pro-forma on a school year basis.

## Annex A

LA Name:	<b>SUFFOLK COUNTY COUNCIL</b>
LA Number	<b>935</b>

### School Block Funding Pro Forma - 2014-2015 (January 2014)

Pupil Led Factors								
1) Basic Entitlement Age Weighted Pupil Unit (AWPU)		Yes / No	Number of Pupils	Sub Total (£)	Total (£)	Proportion Of Funding (%)		
	Reception Uplift		0	£0.00		0.000%		
		Amount (£) Per Pupil	Pupil Units					
	Primary (including Reception)	£2,585.00	52,793.6	£136,471,516.32		37.539%		
	Key Stage 3	£3,788.00	19,952.3	£75,579,148.25	<b>£273,170,024.57</b>	20.789%		
Key Stage 4	£4,192.00	14,580.0	£61,119,360.00		16.812%			
2) Deprivation		Primary Amount Per Pupil (£)	Secondary Amount Per Pupil (£)	Number Of Eligible Primary Pupils	Number Of Eligible Secondary Pupils	Sub Total (£)	Total (£)	Proportion Of Funding (%)
	Primary FSM	£400.00		8,114.7		£3,245,865.35		
	Secondary FSM		£400.00		4,296.2	£1,718,487.91		
	IDACI Score 0.00 - 0.20	£0.00	£0.00	37,017.4	25,001.5	£0.00		
	IDACI Score 0.20 - 0.25	£165.00	£165.00	5,013.1	3,005.0	£1,322,987.81		
	IDACI Score 0.25 - 0.30	£540.00	£540.00	3,501.2	2,083.9	£3,015,920.14		
	IDACI Score 0.30 - 0.40	£1,230.00	£1,230.00	5,114.2	3,205.2	£10,232,774.13		
	IDACI Score 0.40 - 0.50	£1,280.00	£1,280.00	1,563.1	895.8	£3,147,354.33		
IDACI Score 0.50 - 0.60	£1,365.00	£1,365.00	583.7	287.9	£1,189,746.65			
IDACI Score 0.60 - 1.00	£1,605.00	£1,605.00	1.0	0.0	£1,605.00			
						<b>£23,874,741.32</b>		6.567%
3) Looked After Children (LAC)		Amount (£) Per Pupil	Pupil Units	Sub Total (£)	Total (£)	Proportion Of Funding (%)		
	LAC_X_Mar11	£925.00	376.0	£347,806.12	<b>£347,806.12</b>	0.096%		
4) Low Cost High Incidence SEN		Amount (£) Per Pupil	Pupil Units	Sub Total (£)	Total (£)	Proportion Of Funding (%)		
	LowAtt_%_PRI_78	£885.00	12,120.0	£10,726,234.87				
Secondary pupils not achieving (KS2 Level 4 English and Maths)	£1,110.00	9,885.5	£10,972,891.38	<b>£21,699,126.25</b>	5.969%			
5) English As An Additional Language (EAL)		Amount (£) Per Pupil	Pupil Units	Sub Total (£)	Total (£)	Proportion Of Funding (%)		
	EAL_1_PRI	£1,500.00	1,045.3	£1,567,972.43				
EAL_1_SEC	£1,500.00	156.8	£235,164.56	<b>£1,803,136.99</b>	0.496%			
6) Mobility		Amount (£) Per Pupil	Pupil Units	Sub Total (£)	Total (£)	Proportion Of Funding (%)		
	Primary pupils starting outside of normal entry dates	£0.00	699.0	£0.00				
Secondary pupils starting outside of normal entry dates	£0.00	2,500.5	£0.00	<b>£0.00</b>	0.000%			
Other Factors								
		Lump Sum Per Primary School (£)	Lump Sum Per Secondary School (£)	Tapered Sparsity Lump Sum	Total (£)	Proportion Of Funding (%)		
7) Lump Sum	04.833333333333 School	£114,000.00	£114,000.00		<b>£34,751,000.00</b>	9.559%		
8) Sparsity Factor		£100,000.00	£100,000.00	Yes	<b>£2,433,869.03</b>	0.669%		
8) Fringe Payments					<b>£0.00</b>	0.000%		
9) Split Sites					<b>£59,000.00</b>	0.016%		
10) Rates					<b>£5,300,378.07</b>	1.458%		
11) PF Funding		Not Applicable			<b>£0.00</b>	0.000%		
12) Historical Commitments of 6th Form Funding from DSG		Not Applicable			<b>£0.00</b>	0.000%		
13) Exceptional Factors		Not Applicable			<b>£110,699.60</b>	0.030%		
<b>Total Funding for Schools Block Formula (excluding MFG Funding Total) (£) :</b>					<b>£363,549,781.94</b>			
14) Minimum Funding Guarantee	MFG set at -1.5% = £2,369,713.44. Capping set at 5.15% = -£2,353,117.87				<b>£16,595.57</b>			
<b>Total Funding for Schools Block Formula (including MFG Funding Total) (£) :</b>					<b>£363,566,377.51</b>			
De Delegation - Funding Back To Local Authority		Amount (£) Per Pupil	Pupil Units	Sub Total (£)	Total (£)			
	Primary	£29.75	52793.6	£1,570,610.29				
	Key Stage 3	£29.75	19952.3	£593,579.64				
	Key Stage 4	£29.75	14580.0	£433,755.00	<b>-£2,597,944.93</b>			
<b>Total Funding for Schools Block Formula (including MFG Funding Total) (£) :</b>					<b>£360,968,432.58</b>			
% Distributed Through Basic Entitlement :					75.140%			
% Pupil Led Funding :					88.267%			