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# **Schools Forum**

Wednesday, 20th June, 2012 at 4.15 pm

## Additional Papers tabled at the meeting

This meeting is open to the public

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## **AGENDA**

Agendas and papers are now available via the City Council's website

## 5 MODELLING OF NEW SCHOOL FUNDING FORMULA 2013-14

Additional Papers Modelling Options

Appendix 1: Comparison of Options to 2012-13 Revised Base

HEAD OF LEGAL, HR AND DEMOCRATIC SERVICES

# Agenda Item 5

## **BRIEFING PAPER**

**SUBJECT:** Modelling options

**DATE:** 20<sup>th</sup> June 2012

**RECIPIENT:** SCHOOLS' FORUM

#### THIS IS NOT A DECISION PAPER

#### **SUMMARY:**

1. This paper provides a summary of the school funding options that have been modelled so far, in order to determine how funding would be allocated from 2013-14.

#### **BACKGROUND and BRIEFING DETAILS:**

- 2. The first task was to remove all elements from existing budget shares that would be funded under a different mechanism under the new funding reform. These areas include:
  - Funding added for primary review. An assumption has been made that this will be held as a separate contingency budget.
  - Funding for SEN units. This will be funded from the new High Needs Block.
  - Funding received from the EFA for post 16 pupils. Further guidance is awaited from the DfE on how this will allocated.
- 3. Having now identified a new 2012-13 base we can begin to compare the various funding options against this.

#### **ALTERNATIVE OPTIONS CONSIDERED - OPTION 1:**

- 4. The objective for option 1 was to, as much as possible, keep the level of 2012-13 funding the same for each element of the new formula, but use the new DfE supplied data for distribution.
- 5. The Key Issues with option 1:
  - DfE prior attainment data was supplied for one cohort only. This will shortly be updated to whole school cohorts.
  - The modelling is based on the October 2011 pupil count which created variances within the per pupil funding, this should be corrected by changes to the MFG calculation.
  - The new formula has to allocate the same lump sum to both Primary and Secondary schools. In order to allocate the same total funding for 2012-13 through this factor, the new rate becomes £118,000 for each school. This compares to £89,000 for primary and £189,000 for secondary in the existing formula. This issue alone will shift funding from secondary to primary.
  - Where schools would have received Real Term Protection in the past this has now been removed, this only applied to 2 secondary and 1 primary school
  - Under this option 44 out of 61 primary schools and 5 out of 12 secondary schools would achieve a higher level of funding (before MFG calculation) when compared to 2012-13.

#### **ALTERNATIVE OPTIONS CONSIDERED - OPTION 2:**

- 6. The objective for option 2 was set at the first working group, who felt that the funding per pupil should be calculated at a rate of £3,000 for primary and £4,000 for secondary pupils. This moves a step closure to achieving DfE proposals of around £4,000 per pupil. It was also felt that there should be some recognition of the costs associated with Children Looked After.
- 7. The key issues with option 2:
  - Changing the amount per pupil moves a higher proportion of funding into the primary sector.
  - In order to fund the changes the lump sum rate has been reduced to £77,300 per school. DfE guidance sets the lump sum threshold between £100,000 and £150,000.

#### **ALTERNATIVE OPTIONS CONSIDERED - OPTION 3:**

- 8. The objective for option 3 was set at the first working group, who felt that deprivation funding should be targeted at the children who would have at least a 30% chance of coming from a deprived family. The feeling was that the DfE proposed bandings were too wide.
- 9. The key issues with option 3:
  - This change will now target a higher level of funding to the most deprived and this creates a slight movement between sectors.

#### OTHER OPTIONS AND IMPLICATIONS BEING CONSIDERED:

- 10. The DfE guidance recommends we achieve a per pupil amount of £4,000 per sector, this would result in 88% of the available funding being targeted in this way
- 11. If we add in a minimum £100,000 for lump sum this would result in 94% of available funding being allocated on a per pupil and lump sum basis.
- 12. The funding available therefore for deprivation and low cost high incidence SEN would be approx £6.9m or 6% of total budget compared to £21.6m or 18% as currently modelled.
- 13. We are investigating whether some of the SEN funding should be de-delegated to the High Needs block.

### **Appendices/Supporting Information:**

Appendix 1 Comparison of Options to 2012-13 Revised Base

Further Information Available From: Name: Chris Tombs

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		Original 2012-13 Budget Shares	Revised 2012-13 Budget Shares Base		New Schools Funding Reform 2013-14							
	Name	School Budget Position Before Changes in School Funding Reform	Total Adjustment for High Needs, EFA, Primary Review	NEW 2012-13 BASE (Including MFG)	Comparison of Each Option to 2012-13 Budget Shares and Balances Held							
DfE		ORIGINAL 2012-13 BASE			Option 1	Variance Between Option 1 & 2012-13 Base	Option 2	Variance Between Option 2 & 2012-13 Base	Option 3	Variance Between Option 3 & 2012-13 Base	School Balances	
2000	Bassett Green Primary School	£1,545,794	(£12,440)	£1,533,354	£1,480,435	(£52,919)	£1,533,109	(£245)	£1,541,907	£8,553	(£1,219)	
2001	Valentine Infant School	£1,056,039	(£44,564)	£1,011,475	£1,057,971	£46,496	£1,090,272		£1,060,843		£199,784	
	Thornhill Primary School	£1,349,345	, ,	£1,328,178	£1,332,168		£1,371,959		£1,397,960		1	
	Newlands Primary School Sinclair Primary School	£1,423,457 £807,797	£0 (£0)	, ,	£1,454,369 £709,769		£1,503,452 £714,619		£1,546,927 £695,818		£175,704 £140,272	
	Mansel Primary School	£1,123,088	(£39,317)	£1,083,772	£1,066,640	(£17,132)	£1,093,962		£1,121,006		£152,420	
	Beechwood Junior School	£922,489	(£82)		£777,629	(£144,778)	£789,486		£786,976		£18,050	
	Bevois Town Primary School	£844,928	£0	£844,928	£898,346		£913,183		£917,372			
	Bitterne Manor Primary School	£797,479			£837,050	£39,571	£852,997	£55,518	£850,061		1	
	Bitterne Park Junior School Bitterne Park Infant School	£1,136,048 £891,465	03 03		£1,187,915 £940,803	£51,867 £49,338	£1,243,767 £974,455	£107,719 £82,991	£1,240,627 £972,412			
	Mount Pleasant Junior School	£1,159,467	(£37,510)		£1,032,349		£1,057,174		£1,079,625			
	Maytree Nursery and Infant School	£1,159,673	£0		£1,196,490	£36,816	£1,224,921	£65,248	£1,247,241			
2416	Heathfield Junior School	£976,276		£976,276	£1,058,827	£82,551	£1,091,402	£115,126	£1,080,145	£103,870	£22,968	
	Ludlow Junior School	£1,713,335	£0	•	£1,954,652	£241,318	£2,064,988		£2,052,722			
	Ludlow Infant School	£943,062			£1,003,341	£60,279	£1,035,379		£1,033,424			
	Portswood Primary School St Denys Primary School	£1,389,070 £844,582	03 03		£1,494,665 £868,382	£105,595 £23,799	£1,569,706 £882,664	£180,637 £38,082	£1,565,795 £894,516			
	St Johns Primary and Nursery School	£703,269	(£34,478)		£650,445	(£18,346)	£648,081	(£20,710)	£661,391		£120,490	
	Shirley Junior School	£1,513,591	£0		£1,722,002		£1,815,052		£1,774,474			
2426	Shirley Infant School	£894,753	£0	£894,753	£991,644	£96,891	£1,025,069	£130,316	£1,003,031	£108,278		
	St Monica Infant School	£883,585	£0		£956,353	£72,768	£989,178		£973,257		1	
	Sholing Junior School	£875,943	£0	,	£952,534	£76,591	£977,636	£101,693	£971,947			
	Sholing Infant School Swaythling Primary School	£800,687 £853,141	(£53,061) £0	£747,627 £853,141	£712,654 £828,103	(£34,972) (£25,038)	£721,804 £844,046	(£25,822) (£9,095)	£720,363 £835,675			
	Woolston Infant School	£660,987	£0		£695,493		£702,876	£41,890	£686,802			
	Weston Park Junior School	£1,264,116			£1,289,397	£25,281	£1,334,079	£69,963	£1,335,148			
	Weston Park Infant School	£861,723		£861,723	£912,288	£50,565	£929,067	£67,344	£921,346			
	Tanners Brook Junior School	£1,350,378	(£106,544)		£1,219,726	(£24,108)	£1,269,423		£1,279,283			
	Tanners Brook Infant School	£1,110,175			£1,037,176		£1,067,272		£1,072,069			
	Glenfield Infant School Banister Infant School	£830,558 £743,394			£845,033 £741,142		£860,148 £743,217	£75,405 £32,703	£857,180 £737,451		£19,593 £47,310	
	Mansbridge Primary School	£897,503			£905,536		£921,760		£935,602			
	Redbridge Primary School	£918,040	£0		£904,651	(£13,389)	£920,992		£937,058			
	Hightown Primary School	£1,077,823		, ,	£1,082,787	£4,964	£1,103,041	£25,218	£1,144,945			
	Wordsworth Infant School	£763,738		£719,147	£739,220	£20,073	£748,938		£739,171			
	Moorlands Primary School	£824,334			£785,585		£802,680	(£17,030)	£804,326			
	St Monica Junior School Hollybrook Infant School	£1,207,320 £679,993	£0	, ,	£1,223,414 £695,152		£1,281,647 £703,721	£74,327 £23,727	£1,258,637 £685,510			
	Hollybrook Junior School	£811,081	£0		£907,659		£931,374		£906,487			
	Kanes Hill Primary School	£1,261,946		£1,239,140	£1,277,664		£1,321,816		£1,345,275		£62,985	
	Townhill Infant School	£986,007	£0		£1,029,955		£1,061,001		£1,066,162			
	Weston Shore Infant School	£559,897	(£53,831)	£506,066	£451,893		£433,160		£446,631			
	Townhill Junior School Oakwood Infant School	£1,144,618 £647,624	03 03		£1,268,770 £747,561	£124,152 £99,937	£1,311,351 £758,783		£1,319,905 £761,435			
	Oakwood Junior School	£818,479	£0		£879,951	£61,473	£904,734		£902,791			
	Fairisle Infant and Nursery School	£1,074,451	(£59,419)	,	£1,034,858		£1,066,543		£1,058,898			
	Fairisle Junior School	£1,189,294			£1,232,584		£1,278,353	£89,060	£1,269,763			
	Foundry Lane Primary School	£1,489,638	,	£1,447,347	£1,528,782		£1,602,553		£1,586,088		£62,697	
	Shirley Warren Primary School	£1,223,030	(£62,674)		£1,002,034		£1,026,790		£1,025,675			
	Mason Moor Primary School Bitterne CE(C) Junior School	£1,293,605 £811,775			£1,207,757 £866,229		£1,239,241 £892,122		£1,272,009 £886,562			
	Bitterne CE(C) Infant School	£638,898			£687,823		£697,235		£692,786		CEC 924	
3202	Freemantle C of E Community Academy	£963,291	(£62,582)	£900,709	£951,760	£51,052	£972,979	£72,270	£961,310	£60,601	£0 03	
3203	St Mark's Church of England Voluntary Controlled Primary Schoo	£1,671,793	(£73,005)	£1,598,788	£1,580,919	(£17,869)	£1,653,318	£54,530	£1,639,633	£40,845	£191,641 <del>O</del>	
	St Mary's CE(C) Primary School	£2,062,920			£1,883,882		£1,961,420		£2,012,992		£354,478	
	Highfield Primary School Springhill RC(A) Primary School	£905,722 £2,118,256			£910,282 £2,236,217		£940,101 £2,371,836		£941,524 £2,354,477			
	Holy Family RC(A) Primary School	£2,118,256 £1,483,767			£2,236,217 £1,594,250		£2,371,836 £1,662,024		£2,354,477 £1,688,231		£196,551	
	St Patrick's RC(A) Primary School	£1,124,809		£1,102,032	£1,182,237		£1,229,684		£1,215,981		£87,592	
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3659	Harefield Primary School Total School Summary	£1,264,597 <b>£65,343,938</b>		£1,238,760 £64,209,388	£1,227,267 <b>£65,932,465</b>		£1,268,945 <b>£68,002,590</b>		£1,266,366 <b>£68,041,027</b>			

	Original 2012-13 Budget Shares	Revised 2012-13 B	udget Shares Base	e New Schools Funding Reform 2013-14							
	School Budget Position Before Changes in School Funding Reform	Total Adjustment for High Needs, EFA, Primary	NEW 2012-13 BASE (Including MFG)	Comparison of Each Option to 2012-13 Budget Shares and Balances Held							
DfE Name	ORIGINAL 2012-13 BASE			Option 1	Variance Between Option 1 & 2012-13 Base	Option 2	Variance Between Option 2 & 2012-13 Base	Option 3	Variance Between Option 3 & 2012-13 Base	School Balances	
4262 Regents Park Community College	£4,203,181	£0	£4,203,181	£4,204,883	£1,701	£4,044,806	(£158,375)	£4,021,525	(£181,657)	£1,051,543	
4264 The Sholing Technology College	£4,857,824	£0	£4,857,824	£5,173,646	£315,821	£4,968,705	£110,880	£4,931,807	£73,983	£445,407	
4270 Redbridge Community School	£5,912,039	(£83,382)	£5,828,657	£5,845,469	£16,812	£5,644,836	(£183,821)	£5,722,719	(£105,938)	£298,859	
4271 Chamberlayne College for the Arts	£3,442,095	£0	£3,442,095	£3,215,735	(£226,359)	£3,080,978	(£361,117)	£3,066,966	(£375,129)	(£2,208)	
4275 Upper Shirley High School	£3,531,508	£0	£3,531,508	£3,343,425	(£188,084)	£3,198,483	(£333,025)	£3,157,813	(£373,695)	£0	
4278 Bitterne Park School	£7,603,614	(£657,231)	£6,946,383	£7,473,073	£526,690	£7,197,239	£250,856	£7,189,573	£243,190	£363,406	
4306 Woodlands Community College	£4,301,564	£0	£4,301,564	£3,924,440	(£377,124)	£3,777,335	(£524,229)	£3,813,575	(£487,990)	£243,357	
4311 Cantell Maths and Computing College	£5,856,064	(£33,473)	£5,822,591	£5,482,320	(£340,271)	£5,288,767	(£533,824)	£5,313,924	(£508,667)	£385,835	
5415 St George Catholic Voluntary Aided College	£2,646,666	£0	£2,646,666	£2,525,455	(£121,211)	£2,407,137	(£239,529)	£2,404,885	(£241,781)	£171,323	
5417 St Anne's Catholic School	£5,342,253	(£431,847)	£4,910,406	£4,928,745	£18,339	£4,726,961	(£183,446)	£4,715,576	(£194,830)	£162,190	
6905 Lords Hill Academy	£4,297,847	£0	£4,297,847	£3,459,706	(£838,141)	£3,319,882	(£977,965)	£3,309,384	(£988,463)	£0	
6906 Mayfield Academy	£4,216,465	£0	, .,	£3,705,752	(£510,711)	£3,556,668	(£659,796)	£3,525,395	(£691,068)	£0	
9999 Total School Summary	£56,211,122	(£1,205,933)	£55,005,187	£53,282,649	(£1,722,538)	£51,211,796	(£3,793,391)	£51,173,141	(£3,832,046)	£3,119,713	
9999 Grand Totals Across Primary & Secondary	£121,555,060	(£2,340,484)	£119,214,575	£119,215,115	£540	£119,214,385	(£190)	£119,214,168	(£407)	£8,813,429	

Note: Schools in italics are currently receiving MFG funding