

Public Document Pack

Schools Forum

Wednesday, 17th October,
2012
at 4.15 pm

PLEASE NOTE TIME OF MEETING

**ST GEORGE'S CATHOLIC VA COLLEGE
LEASIDE WAY, SWAYTHLING, SO16 3DQ**

This meeting is open to the public

LEAD OFFICER

Lynn Franklin, Children's Services and Learning
Finance Manager

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FORUM ADMINISTRATOR

Sharon Pearson

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AGENDA

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

1 ELECTION OF THE CHAIR

To consider nominations for 2012/2013.

2 APOLOGIES AND CHANGES IN MEMBERSHIP (IF ANY)

3 MINUTES OF PREVIOUS MEETING

Minutes of the meeting held on 19th September 2012, attached.

4 DECLARATIONS OF INTEREST

In accordance with the Localism Act 2011, and the Council's Code of Conduct, Members to disclose any personal or pecuniary interests in any matter included on the agenda for this meeting.

NOTE: Members are reminded that, where applicable, they must complete the appropriate form recording details of any such interests and hand it to the Democratic Support Officer.

5 SCHOOLS FORUM TERMS OF REFERENCE

Briefing paper of the Forum Administrator, providing details of changes to the Schools Forum arrangements and amendments to Terms of Reference and seeking comments from members on the composition of the Schools Forum going forward, attached.

6 SCHOOLS FUNDING REFORM 2013-14 FEEDBACK ON CONSULTATION

Decision paper of the Principal Accountant, Children's Services, requesting that the Forum make the final recommendation on the new Southampton Schools Funding Formula in light of the consultation responses, attached.

11TH OCTOBER 2012

HEAD OF LEGAL, HR AND DEMOCRATIC
SERVICES

Agenda Item 3

SOUTHAMPTON SCHOOLS' FORUM NOTES OF THE MEETING HELD ON WEDNESDAY 19th SEPTEMBER 2012 AT ST ANNE'S CATHOLIC SCHOOL

Present:

Primary School

David Turner	-	Governor
Colin Warburg	-	Governor (Chair)
Mark Sheehan	-	Headteacher
Ian Taylor	-	Headteacher (substitute for Julie Swanston)
Peter Howard	-	Headteacher

Secondary Schools

Karen Dagwell	-	Headteacher
Ruth Evans	-	Headteacher
Graham Wilson	-	Headteacher

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Non Schools

Peter Sopowski	-	NUT Secretary
Beverley Murtagh	-	14-19 Partnership
Anna Wright	-	PVI for Early Years
Councillor Keogh	-	Council representative

Observers

Beverley Pennekett	-	Education Funding Agency
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Also in attendance:

Councillor Bogle	-	Cabinet Member, Children's Services and Learning
Alison Alexander	-	Children's Services and Learning
Lynn Franklin	-	Children's Services and Learning
Chris Tombs	-	Children's Services and Learning
Jane Altounyan	-	CRC Officer - SCC
Ian Davies	-	-Project Manager – Energy & Heating
Sharon Pearson	-	- Democratic Services

1. **APOLOGIES AND CHANGES IN MEMBERSHIP (IF ANY)**

Apologies were received from Ian Golding, Jonathan Howells, Julie Swanston, Richard Harris and Karen Stacey.

The Chair welcomed Graham Wilson and Peter Howard, new members and Beverley Pennekett from the Education Funding Agency as official observer, to the meeting.

Members passed a vote of thanks to Beverley Murtagh who had very kindly provided the venue and refreshments for the meeting.

The next meeting was scheduled for 17th October and Graham Wilson, St George's Catholic VA College, very kindly agreed to host the meeting.

2. **NOTES OF PREVIOUS MEETING AND MATTERS ARISING**

The minutes of the meeting held on 18th July 2012 were approved as a correct record.

3. **PROPOSAL FOR ENERGY EFFICIENCY INVESTMENT IN SCHOOLS FROM RESIDUAL CRC FUNDING**

The Forum received a briefing paper from the Carbon Reduction Officer, detailing various proposals on how the unspent amount of £42,805 could be utilised to improve schools' efficiency and knowledge relating to the Carbon Reduction Commitment

The following was noted:-

- That this was a "one-off" underspend for one year and if any proposal was ongoing, it would have to be done by way of an SLA.
- That any individual employed to promote CRC in schools should have a specific job description encompassing energy management and conservation experience as well as the ability to communicate issues to children.
- That the Forum was in favour of employing an individual to promote CRC in schools as well as providing training to site managers at schools.
- That if this was agreed, there may be the possibility of additional funding being available by way of Department for Transport grant.

RESOLVED that officers would progress the temporary appointment.

4. **REVIEW OF SLA – SUPPLY COVER FOR LONG TERM SICKNESS 2013/2014**

The Forum considered a decision paper of the Principal Accountant, Children's Services, providing a review of the Supply Cover SLA, for the Forum to provide a view on the withdrawal of the current SLA.

The following was noted:-

- There was an ongoing decline in the number of schools buying into this SLA which would continue in 2013-14.
- That on average, secondary schools received a larger amount of funding from the scheme, with less cost to the school than primary schools and that if the SLA was to be continued, a fairer pricing mechanism would have to be introduced which would inevitably lead to secondary schools paying more.

David Turner proposed that the current SLA for supply cover in relation to long term sickness be withdrawn, seconded by Karen Dagwell.

RESOLVED that upon putting to the vote, the following was agreed:-

- (i) that the current SLA for supply cover in relation to long term sickness should be withdrawn with effect from financial year 2013-

14; and

- (ii) that when SLA's were sent out to schools for review at the end of September, the current situation with regard to this SLA would be highlighted and a list of outside providers for this cover would be attached so that all schools were made aware of the situation.

For : 9

Abstained – 3

5. **SCHOOL FUNDING REFORM**

The Forum considered a decision paper from the Education and Economic Development Finance Manager detailing the progress made on the development of the new School Funding Formula for the Forum to agree the following recommendations:-

- the preferred option for the new School Funding Formula
- proposals to move funding between the Schools Block SEN Notional Budget and the High Needs Blok for pupils with low incidence SEN.
- Approve contributions from the Schools Block to school focused services delivered by the Council; and
- Recommend the maximum amount of funding be routed through the PFI factor.

A discussion ensued and the following issues and concerns were noted:-

- Two new factors had been introduced by the DfE, "reception uplift" taking into account the net difference between the October 2011 and January 2012 pupil census for Year R and "Mobility" which took into account pupil turbulence.
- That primary and secondary schools were funded at different rates.
- That the current formula allocated the two Academies too much grant funding and under the new formula they were protected by the MFG. Officers to have a discussion with the Principals of the Academies and make representation to the DfE to gain an exemption to the MFG.
- That Forum members had previously received an unanimous negative response from Primary and Secondary Heads to include the PFI factor in the School Funding Formula.
- That approximately 50% of authorities fund the PFI affordability gap through their Schools Budget.
- that representations be made to central government via the LGA to bring to their attention the serious problems that the reduced DfE funding was creating in Children's Services.

RESOLVED that upon putting to the vote, Option 1 should be incorporated into the new model with the following factors/additions:

- (i) that the primary and secondary funding ratio should be kept to a 1 to 1.33 ratio
For – Unanimous

- (ii) Looked after children factor introduced at the same rate as Secondary Free School Meals factor
For - Unanimous
- (iii) Deprivation Funding to be targeted at higher levels of deprivation
For – Unanimous
- (iv) Low cost, high incidence SEN factor and figure to be included
For – Unanimous
- (v) Uplift factor included
For – Unanimous
- (vi) Mobility factor included at figure of £679 to be included
For - 11
Abstained – 1
- (vii) EAL factor and figure to be included
For – Unanimous
- (viii) Lump Sum reduced to fund changes
For – Unanimous
- (ix) Split Sites not to be added as a factor
For – Unanimous
- (x) That the following central services be funded from the Schools Block:-
 - Admissions function - £346,900
 - Carbon Reduction Commitment - £160,000
 - Family and Parenting Practitioners - £426,800
 - Preventative Social Care Workers - £200,000
- (xi) PFI Factor - It was agreed that Forum Members would consult with all school heads on adding a PFI factor amount of £450,000 for one year only (the difference in the gap between £750,000 and £1.2 M).
- (xii) That all schools would be consulted on the above School Funding Formula model without the PFI factor; and
- (xiii) That officers would prepare a model showing the effect of a £450,000 PFI factor along with a briefing paper for a final decision to be made on the School Funding Formula Model.

BRIEFING PAPER

SUBJECT: CHANGES TO SCHOOLS FORUM ARRANGEMENTS AND AMENDMENT OF TERMS OF REFERENCE

DATE: 17TH OCTOBER 2012

RECIPIENT: SCHOOLS FORUM

THIS IS NOT A DECISION PAPER**SUMMARY:**

- 1 The Department for Education (DfE) is presently in the process of consulting on school funding reform and a document outlining the rationale and principles is in the public domain – “School funding reform – next steps towards a fairer system”. Included in this document are improved Schools Forum arrangements, recently tabled at a Schools Forum Meeting.
- 2 Responses to the DfE consultations in April and July have shown that Schools Forums are not consistent throughout local authorities.
- 3 In order for local decision making to operate in a consistently fair and effective way and in consultation with schools, there is need to secure greater confidence in Schools Forums.
- 4 Changes have therefore been made to Schools Forums arrangements so that they are in place to support decision-making for 2013-14 and these changes will ensure that Schools Forum discussions are more focussed, that decisions are more transparent and that those most affected have a greater say.

BACKGROUND and BRIEFING DETAILS:

- 5 There will not be any changes to Schools Forum powers at this stage and for 2013-14 Schools Forums regulations will be amended as follows:-
 - (i) Composition of the Forum should be compliant with the regulations and should reflect the pupil numbers expected to be in each category. At this stage it has been decided not to change the numbers/composition until we know which schools will be converting to Academy status.
 - (ii) Remove the requirement to have a minimum of 15 people on a Forum.
 - (iii) Restrict other local authority attendees from participating in meetings unless they are a Lead Member, DCS, DCS representative or are providing specific financial or technical advice (including presenting a paper to the Forum).
 - (iv) Give the Education Funding Agency (EFA) observer status at Schools Forum meetings to support the local process and to provide a national perspective if members thought it helpful or if there were any concerns about the running of the Forum.
 - (v) Require local authorities to publish Forum papers, minutes and decisions promptly in a public area of their websites.
 - (vi) Require Forums to hold public meetings.

BRIEFING PAPER

- (vii) Any regular communications from the authority to schools should also draw attention to forthcoming schools forum meetings and agendas and the minutes of forum discussions.
- (viii) Restrict the voting arrangements by allowing only schools members and the PVI members to vote on the funding formulae.
- (ix) The regulations state that maintained primary schools, secondary schools and Academies should be represented on Forums in proportionate to the number of pupils in those types of schools. Appendix 1 provides an analysis of the current Forum composition, comparing it to how this will look after the 2012-13 proposed Academy conversions.

6 At this stage we comply with all the amendments/changes.

7 These changes will be determined in accordance with the Senior Manager : CYP Strategic Commissioning delegated power 5.4.12 –

“Following consultation with the relevant Cabinet Member, Senior Manager, Legal, HR and Democratic Services and the Senior Manager, Finance and IT, to amend the Terms of Reference and membership set for the Schools Forum and Admissions Forum as far as may be necessary to give effect to any new Act, Regulation or Code of Practice”.

8 **We would therefore seek comments from members on the composition of the Schools Forum going forward on the basis of the new regulations, of the proposed academy transfers there are currently 2 members on the forum that represent the Secondary sector – refer to 5 (ix) above and Appendix 1.**

RESOURCE/POLICY/FINANCIAL/LEGAL IMPLICATIONS:

None

OPTIONS and TIMESCALES:

The Schools Forum's Terms of Reference states that the constitution, appointment of the Chair and review of members is considered on an annual basis at the first meeting of the academic year which would be 19th September 2012.

Appendices/Supporting Information:

1 Schools Forum Membership 2012-13

Further Information Available From:

Name:	Sharon Pearson
Tel:	023 8083 4597
E-mail:	sharon.pearson@southampton.gov.uk

BRIEFING PAPER

Appendix 1

Schools Forum Membership 2012-13							
Schools	2012-13 NOR	Current Numbers of Reps	Current Position @ 1st September 2012	Current Numbers of Reps	2012-13 Year End Proposed Position	Proposed New Split	Notes
Primary	15,515	6	14,823	6	13,142	6	
Secondary	8,167	4	7,076	4	2,849	1	
Academy (Primary / Secondary %)	2,786 (31%/69%)	1	4,569 (34%/66%)	1	10,477 (31%/69%)	4	Working on the basis that Academy Representation will be from all sectors
Special	336	2	336	2	336	2	Basis that Head & Governor Remain on Forum
Nursery		1		1		1	
Non Schools		5		5		5	
Totals	26,803	19	26,803	19	26,803	19	Assumption that total remains at 19 Members

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DECISION PAPER

SUBJECT: Schools Funding Reform

DATE: 17th October 2012

RECIPIENT: Schools Forum

SUMMARY

Schools Forum recommended the new schools funding formula for consultation with all schools at the September meeting. Details of the proposed formula have been sent to all Head Teachers, Chair of Governors and Finance Officers and this report reports on feedback from the consultation and proposals for the final formula.

RECOMMENDATION

It is recommended that the Forum:

- i. Makes the final recommendation on the new Southampton schools funding formula in the light of the consultation responses in particular proposals to:
 - include a split site factor
 - fund £450,000 through the PFI factor
 - allocate any “headroom” funding within the 2013-14 Schools Block to the PFI factor.

REASONS FOR REPORT RECOMMENDATIONS

1. The Department for Education has set a deadline of the 31st October 2012 for Local Authorities to submit their new proposed schools funding formulas. The Forum is therefore asked to recommend the proposals for the new formula based upon feedback received from the consultation with schools. The final decision on the formula rests with the local authority.

ALTERNATIVE OPTIONS CONSIDERED AND REJECTED

2. Four funding options were presented to the Forum at the September meeting. Discussion took place on each of the various factors contained within each option. Forum members then agreed which factors would form part of the final option that would then be sent out for consultation.

BACKGROUND and BRIEFING DETAILS:

3. Consultation responses

The consultation paper included six questions centred around the proposed factors and the method adopted for funding the Minimum Funding Guarantee (MFG) which is achieved by scaling back the gainers. The responses received are shown in Appendix A.

4. Split site factor

The formula that went out to consultation did not include a split site factor in line with the Forum's recommendation. A detailed response from Highfield Primary on the proposed removal of the split site factor is attached in Appendix B.

5. PFI Factor

In the light of the Council's budgetary position, the Forum is asked to reconsider the proposal to fund £450,000 of the affordability gap from the Schools Budget through the PFI Factor.

6. Comparison with other local authorities

It was agreed at the last South East Education Finance Officers Group that we would circulate our proposed school funding formulas to each other to allow us to provide some comparisons with other Local Authorities to our working groups and Schools Forums. Appendix C shows comparisons against funding options.

7. Targeting of growth funding (headroom)

The Schools Block for 2013-14 has been estimated using October 2011 pupil data. In December the DfE will confirm final allocations based on October 2012 pupil data which is likely to result in an increase in the overall budget. The majority of this funding will feed through the formula in terms of additional pupil numbers at individual schools, or changes in other data such as IDACI or Prior Attainment. However, once this has been completed any funds remaining, known as "headroom" can be targeted at any one, or a combination of the nine factors.

8. It is proposed to allocate any headroom funds to the PFI factor in addition to the proposed £450,000 in paragraph 5 above.

Appendices/Supporting Information:

Appendix A – Summary of consultation responses

Appendix B – Split site response from Highfield Primary

Appendix C – School Funding Comparisons

Further Information Available From:

Name: Chris Tombs

Tel: 023 8083 3785

E-mail: Chris.tombs@southampton.gov.uk

Summary of consultation responses

Question 1 – Do you agree with the proposal to target deprivation at an IDACI level of 30% and above?

Number of Responses: 8

Answers: 100% Yes

Further Comments: Range could be set at 27% and above as students with similar indices of poverty may miss out.

Question 2 – Do you agree that there should be provision made for a Children Looked After factor?

Number of Responses: 8

Answers: 100% Yes

Further Comments: None

Question 3 – Do you agree that there should not be a split site factor within the new formula?

Number of Responses: 8

Answers: 6 Yes. 2 No

Further Comments: Should not be an automatic right - but funding could target unavoidable costs – See Appendix B from Highfield Chair of Governors.

Question 4 – Do you agree that there should be provision made for pupils who join a school not at the start of the academic year?

Number of Responses: 8

Answers: 100% Yes

Further Comments: None

Question 5 – Do you agree that schools should make a contribution to the PFI affordability gap?

Number of Responses: 8

Answers: 100% No

Further Comments: No - This has been a City Council issue and should remain so.
No - unfair to expect other schools to pick up the cost of poor decisions made in the past
No - Grossly unfair to top slice money directly from students

Question 6 – Do you agree with the proposal to scale back winners rather than limit all gains to a set percentage?

Number of Responses: 8

Answers: 7 Yes. 1 No

Further Comments: No - seems unfair for schools to lose out on funding that they are due.

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Agenda Item 6

Appendix 1

Appendix B

School name: Highfield Church of England Primary School .

Question 3: The Schools Forum has made the decision not to include a split site factor within the new formula. Do you agree that there should not be a split site factor within the new formula?

Background

The decision not to include a split site factor in the new local funding formula is contrary to national policy, the guidance issued by the Education Funding Agency and the local authority's own calculations for over a decade. All of them have acknowledged that split site schools face higher costs, which according to the Government, "Should be reflected through a cash sum to the school(s) affected."

It is inconsistent with the forum's approach to the rates element of the formula, which both recognises and then makes provision for schools' fixed costs. It is only fair that the same principle should be applied to schools that have two sets of fixed costs across two separate sites.

It is at odds with the approach taken by every other authority in the region including Bournemouth, the Isle of Wight, Wiltshire, Dorset, West Sussex, Surrey and Hampshire who for these very reasons have included it their own formulas (Portsmouth had not published their proposals at the time of submitting this response).

Finally, it appears unfair that the school could be financially penalised due to factors beyond its control. The school has, in the past, sought the support of the local authority to move to one site. The opportunity to do this, which would have incurred minimal costs to either party, did present itself but the local authority choose not to pursue it. Consequently Highfield Primary has been left as the only school in the city based on two sites.

National Policy

The national policy framework explicitly confirms that split sites face higher running costs and this underpins the reason for permitting this to be one of only twelve factors that can be considered as part of the local formula. The DfE's 'School funding reform: Next steps towards a fairer system' published in 2012 states that,

"Split sites

1.3.45. Schools that operate on split sites often face higher running costs as a result of, for example, the cost of travel between sites and the care and maintenance of two sites. Of course we expect all schools to find efficient ways of operating and to seek value for money. We also expect local authorities to fund such schools in a way that incentivises efficiency rather than sustaining inefficiency.

1.3.46. Since we are keen to continue to encourage schools who do adopt efficient solutions, such as merging and federating, it is important that the consequences of those solutions continue to be reflected in schools' budgets. We will therefore continue to allow local authorities to include a split site factor in their local formulae. This should be reflected through a cash sum to the school(s) affected. "

It is also included in the Government's, "School funding reform: Technical Guidance for Local Authority Formula Tool v2.0" published in September 2012, which assumes that a split site element will be included.

Education Funding Authority (EFA)

Furthermore the EFA goes even further to recommend that LAs must publish a definition of a split site school, identify the costs that are incurred by any school (s) affected and this forms part their annual reporting requirements. The EFA's '2013-14 Revenue Funding Arrangements: Operational guidance for local authorities' states,

"h. split sites – the allocations must be based on objective criteria, both for the definition of a split site and for how much is allocated. Where existing factors have been used for some years and the rationale is unclear, these should be reviewed;"

It goes on to confirm,

"90. The proforma will also contain a sheet for additional information including details of how split site and PFI allocations have been calculated..."

EFA Compliance – split site definition

To comply with the EFA's guidance, we suggest the definition of a split site school in Southampton could be:

"Any school where at least 70% of the school's total lessons are delivered in two or more buildings that are at least 500 metres apart, separated by at least one public highway, and requires adult supervision for pupils to undertake the journey."

EFA Compliance – split site cost analysis

We have met with and spoken to LA finance officers to examine our current and proposed annual budget. To comply with the EFA's guidance, we have identified with officers the additional costs that our school incurs as a result of being split across two sites. We unanimously agreed these additional costs, which are outlined in the excel spread sheet marked appendix 1.

Nevertheless, a short summary of what we jointly indentified is as follows:

Additional split site requirements calculation

LA cost

1. Staff Costs -Additional management, office, and maintenance staff time
£38,168
2. Equipment - Amortised cost of replacing extra IT and other equipment

£6,271
3. Standing Charges/Utility -
Cost of broadband, IT link and water standing charges
£7,692
4. Term Servicing -
Cost of additional term servicing work required due to second
site £2,907
5. Overhead - additional overhead costs from running two sites
£2,202

Total additional split site costs
£57,239

(The attached excel spread sheet appendix 1 provides detailed figures by budget heading and explanatory notes.)

EFA & Legal Advice

According to the advice we received from the EFA and our legal advisor, as there is an option to take account of the additional costs of split site schools, it would appear 'unreasonable' for this not to be included in the formula unless it can be shown that no additional costs apply. As our discussions with the LA demonstrate, beyond doubt, there are significant additional split site costs amounting to £57,239. Therefore they should be recognised. In accordance with the EFA guidance, these costs demonstrate significant efficiencies when compared to the split site element proposals in neighbouring authorities. For example, Dorset primary schools, with a similar set up to our own, will be given up to £77,861 to meet these additional split site costs. The relevant sections of Dorset's consultation paper are included at the foot of this response.

Financial Consequences for the School

The consequences for Highfield Primary school, if these additional costs are not met, are significant as these costs are equivalent to 6.6% of our budget (proposed 2012-13 budget is £871,103). Whilst we recognise that the guidance does not permit an additional element for inadequate facilities to be included in the local formula unless the costs are more than 1% of the school's budget, this relates to an additional £8,000 per annum of costs that the school currently incurs hiring a separate school hall, which will also not be met. When the two set of costs are added together, this amounts to 7.5% of our budget. As the overwhelming proportion of our costs are salaries, the bulk of these costs have to be found from this budget line. They are unlikely to be met from our carry forward this year, which has been allocated to meeting the costs of expanding our school (Please see the note below in the 'Other

Comments' section, which explains this in more detail). Nevertheless, the impact of recognising these costs in the formula on other schools in the city is minimal as it accounts for less than 0.5% (57,239/119,214,461) of the schools budget.

Wider Consequences for Southampton

The omission of a split site factor from the local formula would further undermine national policy, which is to encourage schools to consider the benefits of federating. Whilst a split site factor identifies additional costs of working across two sites, these may be more than offset by the savings made by changing the staffing structure and potential economies of scale when ordering goods and services. Furthermore a move to a federated structure, across two or more schools, may result in an improvement in educational outcomes and this might be something the authority wish to promote in the future. Significantly reducing the potential financial benefits of undertaking this type of restructuring is likely to dissuade schools from considering this option.

A decision not to recognise these costs, may also have the perverse incentive for Highfield Primary School to restructure the infants and juniors as to two separate schools, which in theory would enable each school to gain the lump sum element of the formula. Although this is likely to be a complex and potentially disruptive course of action, which we would be keen to avoid, if the costs of running a split site school are prohibitive then we would have to actively consider this option to fulfil our financial duties as a board of governors.

Agreed by:

Leslie Fuller, Chair of Governors
Finance & Resources Committee
Allan King, Head Teacher

Submitted:

12/10/12

Dorset County Council – local school funding formula consultation document September 2012

“64. The split site factor remains allowable within the new formula to support schools that have multiple premises or operate across more than one site. The factor must be paid in accordance with criteria published by the authority. In Dorset this factor will be used for three purposes.

“65. Most schools work from buildings and land that is in one place, owned by the Council or a trust that enables the school to operate within a confined area. However, there are some schools that have buildings which are operated as part of the school but are distant from the main part of the school (Split Site - Multiple Sites), and some schools where additional land or buildings are leased/rented or transport is paid to enable the school to have the facilities to operate effectively (Split Site - Inadequate Facilities).

“66. At present schools that are split site receive additional funding to support their need for duplicated reception facilities and additional management responsibilities and schools that have inadequate facilities have the additional land or transport required paid for by the LA. Both these budgets will need to be delegated to the schools concerned and this will be via an amended split site factor.

Split Site - Multiple Sites

“67. Proposed criteria and formula for delegation for the multiple sites factor:

- The site must be split by a main road that requires adult supervision to cross and,
- Sites must be at least 750 meters apart via the shortest route from the site main entrance to the main entrance. NB. The term main entrance indicates an entrance that is attended at all time and,
- The second, or subsequent sites, must house children of compulsory school age equalling at least the admission number of the school or 50 pupils (whichever is the greater)

“68. It is therefore propose that the new criteria is applied in 2013-14 but that 2012-13 values are held i.e. £67,861 for a primary school or £86,482 for a secondary school plus an additional £14,382 payable per site where there are more than two sites.

Split Site - Inadequate Facilities

“69. Where schools have remote or inadequate PE facilities or do not have access to a hall, a lump sum will be allocated based upon the current cost to enable the school to make payment for the hire of a hall or land or to transport children to alternative facilities. Currently this funding is held centrally and allocated on the basis of either coach hire or staffing costs (where children can travel on foot but require adult supervision) or the rents are paid directly. Since the LA is no longer able to retain funding for this purpose it is proposed that an amount of £10,000, £5,000, £2,000 or zero (where costs are

negligible) is delegated at the start of the year enabling the school to resolve the transport/rent issues however it sees fit. Eligibility will be agreed on an individual basis in consultation with the Premises team in Children's Services as will payment details. In some cases due to the terms of leases, DCC will need to make payment and charge the individual school. Please note that a school experiencing difficulty accessing the hall as a result of students sitting exams will not attract funding under this scheme."

Agenda Item 6

SEFOG- Primary and Secondary Schools New Funding Formula

Appendix 2

A) Losses and Gains (before protection)	Southampton	Average	Highest	Lowest
What is your largest loss for a primary school?				
£	£204,569	£174,495	£282,706	£82,516
% of budget share	21%	13%	18%	11%
same or different schools	Same School		Different School	Same School
What is your largest loss for a secondary school?				
£	£836,380	£323,284	£515,026	£169,727
% of budget share	24%	8%	18%	3%
same or different schools	Same School		Different School	Same School
What is your largest gain for a primary school?				
£	£210,403	£120,398	£213,850	£51,424
% of budget share	11%	13%	17%	10%
same or different schools	Different School		Different School	Same School
What is your largest gain for a secondary school?				
£	£436,395	£243,781	£567,142	£56,295
% of budget share	5%	5%	8%	2%
same or different schools	Same School		Same School	Different School
If you are putting in any transitional arrangements eg gains ceiling or scaling				
What have you done?	Scaling		Scaling	Gains Ceiling
What percentage?	79.0%		50.2%	4.2%

B) New Formula

Please show the unit values (eg AWPU rates) for those factors you are using

Basic Entitlement	1) Age Weighted Pupil Unit (AWPU)	AWPU (Primary)	Unit Value	£2,651	£2,725	£3,360	£2,286
		AWPU (KS3)	Unit Value	£4,118	£3,913	£4,300	£3,397
	AWPU (KS4)	Unit Value	£4,118	£4,379	£4,858	£3,999	
Additional Educational Needs	2) Deprivation	Free School Meals	Unit Value	£471	£1,370	£2,963	£0
		Free School Meals	Unit Value	£679	£1,689	£3,137	£0
		IDACI (P1)	Unit Value	£0	£158	£305	£0
		IDACI (P2)	Unit Value	£0	£314	£600	£0
		IDACI (P3)	Unit Value	£500	£481	£1,507	£0
		IDACI (P4)	Unit Value	£800	£642	£1,507	£0
		IDACI (P5)	Unit Value	£1,200	£757	£1,665	£0
		IDACI (P6)	Unit Value	£1,500	£889	£2,220	£0
		IDACI (S1)	Unit Value	£0	£277	£521	£0
		IDACI (S2)	Unit Value	£0	£495	£933	£0
		IDACI (S3)	Unit Value	£500	£708	£1,507	£0
		IDACI (S4)	Unit Value	£800	£859	£1,507	£0
		IDACI (S5)	Unit Value	£1,200	£1,053	£1,665	£0
		IDACI (S6)	Unit Value	£1,500	£1,190	£2,220	£0
	3) Looked After Children	LAC	Unit Value	£679	£1,469	£2,687	£0
	4) Low cost, high incidence SEN	Low Attainment (P)	Unit Value	£847	£947	£2,220	£0
		Low Attainment (S)	Unit Value	£2,343	£2,218	£2,901	£0
	5) English as an Additional Language	EAL (P)	Unit Value	£680	£507	£1,500	£0
		EAL (S)	Unit Value	£680	£1,004	£2,438	£0
	6) Mobility	Mobility (P)	Unit Value	£679	£244	£500	£0
Mobility (S)		Unit Value	£679	£471	£1,214	£0	

Lump Sum - what lump sum are you currently modelling?

£114,200	£129,356	£175,000	£70,000
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