

Item 5**TITLE OF REPORT: Mainstream Schools Funding**

Purpose of the Report

1. To bring to Schools Forum the updated Authority Proforma Tool (APT) for retrospective approval, to enable the calculation of mainstream school's individual school budgets for 2018/19.

Background

2. This report builds on reports to Schools Forum in November and December 2017 and 11 January 2018.
3. Following January's School Forum, the Department for Education (DfE) informed local authorities (LAs) that there had been an error in some of the Free School Meal (FSM) and Free School Meal ever 6 data (FSM6). They then published updated data on Friday 12 January.
4. Gateshead's data was downloaded on Monday 15 January and a comparison was undertaken.
5. The data comparison showed that both primary and secondary current FSM data had been overstated, primary by 140 pupils (£61,600) and secondary by 80 pupils (£34,989), giving a total of £96,589 to be redistributed via Gateshead's Formula. No schools FSM numbers increased.
6. The proposed funding for current FSM is £440 per pupil and is aimed at funding the cost of a meal for eligible pupils, therefore the reduction in this funding should not negatively impact on schools with changed data as they will not incur the cost of a free meal for these overstated pupils. FSM6 was not affected.

Modelling

7. The APT was taken back to the factor values agreed in December, and the agreed principles applied to the residual funding with the following outcomes: -
 - As per the 11 January model, funding was allocated to bring EAL funding up to the NFF level
 - There were insufficient funds to increase prior attainment to phase 2 or KS3 AWPU to NFF level
 - The only positive allocation of funding left was the IDACI factors
 - There was no change to the proposal to move to the NFF for secondary Band B

- Band D of the primary IDACI was taken back to phase 2
 - There were insufficient funds to fully fund primary IDACI band E, so primary IDACI band F was selected to be funded at the NFF level.
 - The small sum of funding remaining was used to increase KS3 phase 2 funding by £5.44 and increase from £4.88 in the January model.
8. The Mainstream Funding Sub Group of Schools Forum met on 17 January to review the process followed and the results. All members present agreed that the proposals followed the funding principles and aims and agreed with the above proposals, and proposed to bring the information to the next Schools Forum meeting for retrospective approval.
 9. Members of the group were Ken Childs (Chair), Musty Malik, Andy Ramanandi, Sarah Diggle, Steve Haigh and Chris Richardson (unable to attend), supported by Carole Smith.
 10. All Schools Forum members were e-mailed with the outcome of the subgroup meeting on the 17 January, and the APT was successfully uploaded to the DfE on 19 January meeting the DfE deadlines.

Proposal

11. That Schools Forum retrospectively approves the allocation of additional resources through removal of the funding cap, to move to the NFF rates for EAL, primary IDACI F and secondary IDACI B, and to increase KS3 AWPU by £5.44.
12. That Schools Forum approves the values for the formula factors in the proforma in appendix 1, and notes the 2017/18 and proposed 2018/19 funding comparisons for post MFG budgets, and the pupil number movements.

Recommendations

13. That Schools Forum retrospectively approves: -
 - The removal of the funding cap from schools gaining under the proposed formula
 - Additional funding for EAL to move to the NFF value
 - Additional funding for IDACI primary band F and Secondary band B to move further towards the NFF value
 - A small amount of additional funding for KS3 AWPU
 - The proposed APT as detailed in appendix 1

For the following reasons: -

- To enable Gateshead mainstream schools funding to be calculated
- To move Gateshead's mainstream schools funding formula towards the NFF.

CONTACT: Carole Smith Ext. 2747

Appendix 1

Local Authority Funding Reform Proforma

LA Name:	Gateshead
LA Number:	390

Premises costs to exclude from allocation when calculating the minimum funding level	Mobility	Rates	PFI	Split Sites
	No	Yes	Yes	No
Primary minimum per pupil funding level	Middle school minimum per pupil funding level for secondary pupils		Secondary minimum per pupil funding level	
3300			4600	

Pupil Led Factors

1) Basic Entitlement Age Weighted Pupil Unit (AWPU)	Reception uplift	No	Pupil Units		0.00					
	Description	Amount per pupil		Pupil Units		Sub Total	Total	Proportion of total pre MFG funding (%)	Notional SEN (%)	
	Primary (Years R-6)	£2,852.33		15,000.00		£42,784,950	£78,098,325	39.39%	5.00%	
	Key Stage 3 (Years 7-9)	£3,830.43		5,451.00		£20,879,674		19.22%	5.00%	
	Key Stage 4 (Years 10-11)	£4,385.81		3,291.00		£14,433,701		13.29%	5.00%	
	Description	Primary amount per pupil	Secondary amount per pupil	Eligible proportion of primary NOR	Eligible proportion of secondary NOR	Sub Total	Total	Proportion of total pre MFG funding (%)	Primary Notional SEN (%)	Secondary Notional SEN (%)
2) Deprivation	FSM	£440.00	£440.00	2,574.00	1,461.00	£1,775,400	£13,055,654	12.02%	23.00%	19.00%
	FSM6	£746.67	£1,195.00	4,416.44	2,914.71	£6,780,701			23.00%	19.00%
	IDACI Band F	£200.00	£193.33	1,796.42	1,007.36	£554,041			0.00%	0.00%
	IDACI Band E	£160.00	£260.00	1,797.09	951.62	£534,954			0.00%	0.00%
	IDACI Band D	£355.92	£482.08	2,041.52	1,147.09	£1,279,602			0.00%	0.00%
	IDACI Band C	£397.50	£533.43	577.80	343.96	£413,155			0.00%	0.00%
	IDACI Band B	£461.00	£600.00	1,107.98	579.78	£858,646			23.00%	19.00%
	IDACI Band A	£726.67	£910.37	717.45	371.07	£859,157			23.00%	19.00%
	Description	Primary amount per pupil	Secondary amount per pupil	Eligible proportion of primary NOR	Eligible proportion of secondary NOR	Sub Total	Total	Proportion of total pre MFG funding (%)	Primary Notional SEN (%)	Secondary Notional SEN (%)
3) Looked After Children (LAC)	LAC X March 17	£1,000.00		199.60		£199,600	£909,876	0.18%	0.00%	
4) English as an Additional Language (EAL)	EAL 3 Primary	£515.00		781.18		£402,310		0.51%	0.00%	
	EAL 3 Secondary		£1,385.00		111.17	£153,966				0.00%
5) Mobility	Pupils starting school outside of normal entry dates	£2,000.00		77.00	0.00	£154,000		0.14%	0.00%	0.00%
	Description	Weighting	Amount per pupil	Percentage of eligible pupils	Eligible proportion of primary and secondary NOR respectively	Sub Total	Total	Proportion of total pre MFG funding (%)	Primary Notional SEN (%)	Secondary Notional SEN (%)
6) Prior attainment	Low Attainment % new EFSP	70.00%	£563.33	28.01%	3,893.71	£2,193,446	£3,478,342	3.20%	100.00%	
	Low Attainment % old FSP 73			15.45%						
	Secondary low attainment (year 7)	58.05%	£828.33	18.07%	1,551.19	£1,284,896				100.00%
	Secondary low attainment (year 8)	48.02%		18.56%						
	Secondary low attainment (years 9 to 11)			17.33%						

Other Factors

Factor			Lump Sum per Primary School (£)	Lump Sum per Secondary School (£)	Lump Sum per Middle School (£)	Lump Sum per All-through School (£)	Total (£)	Proportion of total pre MFG funding (%)	Notional SEN (%)	
7) Lump Sum			£113,333.33	£130,000.00			£8,763,333	8.07%	0.00%	0.00%
8) Sparsity factor							£0	0.00%	0.00%	0.00%
Please provide alternative distance and pupil number thresholds for the sparsity factor below. Please leave blank if you want to use the default thresholds. Also specify whether you want to use a tapered lump sum for one or both of the phases.										
Primary distance threshold (miles)		Primary pupil number average year group threshold		Fixed or tapered sparsity primary lump sum?			Fixed			
Secondary distance threshold (miles)		Secondary pupil number average year group threshold		Fixed or tapered sparsity secondary lump sum?			Fixed			
Middle schools distance threshold (miles)		Middle school pupil number average year group threshold		Fixed or tapered sparsity middle school lump sum?			Fixed			
All-through schools distance threshold (miles)		All-through pupil number average year group threshold		Fixed or tapered sparsity all-through lump sum?			Fixed			
9) Fringe Payments							£0	0.00%		
10) Split Sites							£0	0.00%	0.00%	
11) Rates							£1,788,459	1.65%	0.00%	
12) PFI funding							£2,486,642	2.29%	0.00%	
13) Exceptional circumstances (can only be used with prior agreement of ESFA)										
Circumstance							Total (£)	Proportion of total pre MFG funding (%)	Notional SEN (%)	
Additional lump sum for schools amalgamated during FY17-18							£0	0.00%	0.00%	0.00%
Additional sparsity lump sum for small schools							£0	0.00%	0.00%	
Additional funding under the minimum per pupil level of funding factor							£0	0.00%	0.00%	
Exceptional Circumstance4							£0	0.00%	0.00%	
Exceptional Circumstance5							£0	0.00%	0.00%	
Exceptional Circumstance6							£0	0.00%	0.00%	
Exceptional Circumstance7							£0	0.00%	0.00%	
Additional funding to meet minimum per pupil funding level							£27,105			

Total Funding for Schools Block Formula (excluding MFG Funding Total) (£)	£108,607,736	100.00%	£9,553,792
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14) Minimum Funding Guarantee			0.50%	£301,018	
Apply capping and scaling factors? (gains may be capped above a specific ceiling and/or scaled)			No		
Capping Factor (%)		Scaling Factor (%)			
Total deduction if capping and scaling factors are applied				£0	
				Total (£)	
				Proportion of Total funding(%)	
MFG Net Total Funding (MFG + deduction from capping and scaling)				£301,018	
High Needs threshold (only fill in if, exceptionally, a high needs threshold different from £6,000 has been approved)				£0.00	
Additional funding from the high needs budget				£0.00	
Growth fund (if applicable)				£35,000.00	
Falling rolls fund (if applicable)				£0.00	
Total Funding For Schools Block Formula				£108,908,753	
% Distributed through Basic Entitlement				71.91%	
% Pupil Led Funding				87.97%	
Primary: Secondary Ratio				1 :	1.29

Total funding for schools block formula contains funding from outside of the 2018-19 Schools Block allocation?	No
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Appendix 2

		New FSM		Oct-17	Oct-16	
School Name	2017/18	New Formula	Change	NOR	NOR	Change
Total	£105,365,054	£108,908,753	£3,543,699	23742	23544	198
Carr Hill Community Primary School	£1,350,327	£1,378,512	£28,185	303	308	-5
Kelvin Grove Primary School	£1,277,789	£1,349,860	£72,071	300	292	8
South Street Primary School	£1,221,221	£1,222,053	£832	259	270	-11
Bede Community Primary School	£884,438	£982,357	£97,919	187	172	15
Oakfield Junior School	£866,618	£846,807	-£19,810	235	240	-5
LARKSPUR COMMUNITY PRIMARY SCHOOL	£790,680	£725,930	-£64,750	139	156	-17
Oakfield Infant School	£674,352	£670,409	-£3,943	180	180	0
Ravensthorpe Tce Primary School	£951,269	£1,078,822	£127,553	281	252	29
Portobello Primary School	£784,783	£771,804	-£12,980	202	209	-7
Birtley East Primary School	£918,301	£953,201	£34,900	213	212	1
Dunston Hill Community Primary	£1,586,401	£1,670,675	£84,274	391	389	2
Emmaville Primary School	£1,065,520	£1,172,638	£107,119	330	297	33
High Spen Primary School	£644,450	£707,148	£62,697	168	156	12
Swalwell Primary School	£802,604	£814,083	£11,479	169	175	-6
Winlaton West Lane Primary Sch	£1,253,196	£1,275,959	£22,763	340	339	1
Greenside Primary School	£747,484	£781,251	£33,767	183	174	9
Blaydon West Primary School	£627,454	£656,569	£29,115	139	132	7
Front Street Community Primary	£1,472,490	£1,523,832	£51,342	408	398	10
Highfield Primary School	£619,798	£633,432	£13,634	110	108	2
Ryton Community Infant School	£485,370	£451,834	-£33,537	104	115	-11
Ryton Community Junior School	£725,011	£663,814	-£61,196	172	190	-18
Washingwell Community Primary School	£652,795	£637,091	-£15,703	153	160	-7
Bill Quay Primary School	£788,563	£818,919	£30,356	213	207	6
Falla Park Community Primary School	£974,707	£1,034,941	£60,234	223	217	6
Brandling Primary School	£632,179	£763,255	£131,076	149	122	27
Lingey House Primary School	£1,563,016	£1,586,369	£23,354	398	400	-2
THE DRIVE PRIMARY SCHOOL	£808,265	£822,304	£14,039	183	182	1
White Mere Comm. Primary School	£544,744	£558,396	£13,652	137	134	3
Clover Hill Primary School	£751,451	£760,223	£8,772	207	208	-1
Crookhill Primary	£757,691	£759,732	£2,041	186	189	-3
Brighton Avenue Primary School	£1,266,185	£1,366,142	£99,957	291	268	23
Lobley Hill Primary School	£1,448,682	£1,487,078	£38,396	392	383	9
Wardley Primary School	£1,067,569	£1,091,923	£24,355	279	279	0
Glynwood Primary School	£1,301,540	£1,437,294	£135,754	362	330	32
Barley Mow Primary School	£825,975	£782,839	-£43,136	168	186	-18
Windy Nook Primary School	£1,066,808	£1,109,766	£42,958	293	289	4
Colegate Primary	£779,961	£735,810	-£44,151	166	180	-14
Roman Road Primary School	£855,483	£809,848	-£45,635	175	168	7
Fellside Primary School	£755,517	£755,770	£253	209	209	0
Fell Dyke Primary School	£1,322,516	£1,308,036	-£14,480	276	282	-6
Caedmon Community Primary	£907,817	£924,282	£16,465	205	207	-2
Kells Lane Primary School	£1,371,348	£1,398,501	£27,154	418	415	3
Chopwell Primary	£915,654	£968,889	£53,235	215	212	3
Park Head Primary School	£1,234,765	£1,300,112	£65,346	327	314	13
St Aidan's C of E Primary School	£900,164	£914,632	£14,468	202	207	-5
Harlow Green Primary School	£1,689,939	£1,739,641	£49,702	387	387	0
Rowlands Gill Primary School	£1,306,160	£1,328,862	£22,701	277	291	-14
WHICKHAM PAROCHIAL PRIMARY SCH	£761,589	£755,420	-£6,170	210	212	-2
Corpus Christi Catholic School	£821,233	£853,443	£32,210	200	197	3
St Joseph's R C Primary School	£836,258	£842,324	£6,066	198	204	-6
St. Oswald's RC (Aided) Primary	£806,388	£816,966	£10,578	188	188	0
St Peter's R C Primary School	£764,186	£766,500	£2,314	210	211	-1
St Anne's Catholic Primary School	£540,065	£566,421	£26,357	127	126	1
St Joseph's Catholic Junior School	£491,869	£508,752	£16,883	115	114	1
Birtley St. Joseph's Catholic Infant School	£411,086	£398,094	-£12,992	82	89	-7
St Agnes' R C Primary School	£752,962	£731,129	-£21,832	199	208	-9
St Joseph's R C Sch Highfield	£503,904	£477,139	-£26,765	112	122	-10
St Mary & St Thomas Aquinas	£757,940	£765,195	£7,255	213	213	0
St Philip Neri R C Primary Sch	£665,611	£748,604	£82,992	181	163	18
ST JOSEPH'S CATHOLIC SCHOOL	£782,603	£793,690	£11,087	210	213	-3
St Mary's R.C. Primary School	£750,609	£747,631	-£2,978	205	209	-4
St Alban's Catholic Primary School	£814,188	£803,724	-£10,464	208	217	-9
Felling St. Augustine's R.C.P	£1,142,988	£1,180,291	£37,302	308	306	2
St Wilfrid's R C Primary Sch.	£595,608	£614,230	£18,622	117	114	3
Heworth Grange Comprehensive	£5,397,986	£5,613,693	£215,707	1022	1028	-6
Kingsmeadow Community Comprehensive School	£4,014,488	£4,579,324	£564,836	646	589	57
Kibblesworth Academy	£621,734	£682,642	£60,908	166	149	17
RIVERSIDE PRIMARY ACADEMY	£961,393	£989,095	£27,702	239	236	3
Sacred Heart Catholic Primary School	£643,141	£790,137	£146,996	208	165	43
Thomas Hepburn Community Academy	£2,894,644	£2,582,258	-£312,387	413	486	-73
Thorp Academy	£3,952,299	£3,806,529	-£145,770	774	834	-60
Lord Lawson of Beamish Academy	£6,937,815	£7,218,539	£280,723	1263	1243	20
WHICKHAM COMPREHENSIVE SCHOOL	£5,878,316	£6,086,297	£207,981	1279	1298	-19
Joseph Swan Academy	£4,664,246	£5,032,919	£368,673	923	880	43
Cardinal Hume Catholic School	£5,549,879	£5,986,779	£436,900	1204	1143	61
St Thomas More School	£5,410,977	£5,639,342	£228,365	1218	1197	21

