

GATESHEAD SCHOOLS FORUM AGENDA

Thursday, 7 January 2021 at 2.00pm, to be held virtually via Microsoft Teams

From the Chief Executive, Sheena Ramsey

| Item | Business |
|------|--|
| 1 | Apologies |
| 2 | Minutes (Pages 3 - 6) The Forum is asked to approve as a correct record the minutes of the last meeting held on 10 December 2020 |
| 3 | Dedicated Schools Grant Settlement 2021/22 (Pages 7 - 10) Carole Smith, Resources and Digital |
| 4 | Mainstream School Funding Proforma 2021/22 (Pages 11 - 18) Carole Smith, Resources and Digital |
| 5 | De-delegation Trade Union Facility Time and Maternity Credits (Pages 19 - 20) Carole Smith, Resources and Digital |
| 6 | Former Education Services Grant (Pages 21 - 22) Carole Smith, Resources and Digital |
| 7 | Scheme for Financing Schools Consultation Response (Pages 23 - 26) Carole Smith, Resources and Digital |
| 8 | Date and Time of Next Meeting Thursday 11 February 2021 at 2pm |

Contact: Rosalyn Patterson - email: rosalynpatterson@gateshead.gov.uk,
Tel: 0191 433 2088, Date: Wednesday, 30 December 2020

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GATESHEAD METROPOLITAN BOROUGH COUNCIL

GATESHEAD SCHOOLS FORUM MEETING

Thursday, 10 December 2020

PRESENT:

| | |
|-----------------------|-----------------------------------|
| Ken Childs (Chair) | Special School Governors |
| Brendan Robson | Secondary Faith Academies |
| Denise Kilner | Nursery Sector Representative |
| Sarah Diggle | Primary Governors |
| Julie Goodfellow | Primary Academy Headteachers |
| Steve Haigh | Secondary Academy Headteachers |
| Peter Lague | Trade Union Representative |
| Mustafaa Malik | Primary Headteachers |
| Andrew Ramanandi | Primary Headteachers |
| Michelle Richards | Special School Headteachers |
| Domenic Volpe | Maintained Secondary Headteachers |
| Cllr Sheila Gallagher | Elected Member |

IN ATTENDANCE:

| | |
|-------------------|-------------------|
| Cllr Gary Haley | Gateshead Council |
| Carole Smith | Gateshead Council |
| Claire Reid | Gateshead Council |
| Jeanne Pratt | Gateshead Council |
| Jenny Edwards | Gateshead Council |
| Rosalyn Patterson | Gateshead Council |

1 APOLOGIES

Apologies for absence were received from Christine Ingle, Clive Wisby, Andrew Fowler, Alison Hall and Steve Horne.

2 MINUTES

The minutes of the meeting held on 12 November 2020 were agreed as a correct record.

3 EMOTIONALLY BASED SCHOOL AVOIDANCE UPDATE

The Schools Forum received a report on the work done to support children who have Emotionally Based School Avoidance (EBSA).

It was reported that two EBSA Learning Mentors were appointed and took up their posts in October and November. One of the new appointments is pregnant so a third appointment has been made, from the unsuccessful applicants, who has been seconded to the post from the end of January 2021.

Avatars have been deployed which have proved successful in at RTMAT and Special Schools. It was noted that more of these will be used in cases where the pupil has gained confidence and is needing a bridge to school.

The EBSA Strategy and Good Practice Guidance has been completed and sent to all schools.

It was suggested in order to maximise the use of workers there may be opportunities to get workers to extend what they do to online working, i.e. deliver live classes. It was agreed that anything schools have that could be used to bridge the gap from one to one tuition would be beneficial.

It was confirmed that at the EIP meeting children were starting to be allocated to workers. It was also noted that referrals can be made through the online form and there is still capacity within the service.

RESOLVED - That the Schools Forum noted the contents of the report and approved the carry-forward of the projected underspend to support this project.

4 DE-DELEGATION PRIMARY BEHAVIOUR SUPPORT AND FAIR ACCESS

The Forum received a report on Behaviour Support Service and the Fair Access Educational Psychologist (EP). The Forum previously agreed to de-delegate funds to create the EP post and support the Primary Behaviour Support Team.

It was noted that throughout the pandemic contact has been maintained with schools. Three Teaching Assistants spent time at Eslington and Hilltop Special Schools and the rest worked online with schools, continuing with the behaviour network.

There have been 13 new referrals to the EP last year and there are still 25 active cases, which are largely around emotional health. Training has gone online, as well as one to one support and whole school training. It was noted that the service is trying to adapt to the needs of the school in terms of how they continue to deliver.

The Forum was fully supportive of the service and it was felt that the current situation relating to Covid, makes it even more of a need.

The Forum thanked Jeanne Pratt for all of her hard work and wished her luck in the future as this was her last meeting.

RESOLVED - That the Schools Forum approved the de-delegation of funds for the Primary Fair Access Educational Psychologist and the Primary Behaviour Support Team special needs assistants.

5 DE-DELEGATION ETHNIC MINORITY AND TRAVELLER SERVICE

A report was presented on the work delivered by EMTAS since last year. It was noted that there has been a steady rise in the number of Ethnic Minority and Gypsy Roma and Traveller children attending Gateshead schools, an increase from 12.1% to 12.78%.

In addition, there has been an increase in the number of pupils with English as an additional language (EAL), currently 8.16% up from 7.76% in the January 2019 census.

Staffing has remained the same, with the appointment of an EAL Inclusion Officer on a one year fixed term contract, to start in January 2021.

It was confirmed that the EAL support would be available to schools who require additional support for more intensive work.

The Schools Forum agreed that this was a valuable service.

RESOLVED - That the Schools Forum noted the work undertaken by EMTAS to support the educational achievement of all ethnic minority and Traveller pupils in Gateshead schools and approved the de-delegation of funding for EMTAS at the rates of £3.00 for every maintained mainstream primary pupil and £245.00 for each primary maintained mainstream EAL pupil.

6 MAINSTREAM CONSULTATION RESULTS

The Forum received the outcome of the Mainstream School Funding consultation. It was reported that four responses were received, the majority of which were in favour of the proposals contained in the appendix to the report.

The growth funding has been recalculated on October 2020 census data and movement is not as great as originally estimated. Therefore the updated estimate shows a reduction in growth fund by £244,354.

The new academy school has not been announced by the DfE and therefore has been removed from modelling to allow the maximum funding to all other mainstream Gateshead schools.

There has been an increase in the number of free school meals (FSM), once the updated data is received a bigger increase is expected because more children are in secondary school where growth has been the greatest.

It was questioned as to what pressure there will be on the growth fund if the academy school opens. It was noted that the new school will fill from the bottom up so those year 7 pupils will not have been in any other secondary school, and the growth fund looks at movement and where the pupils are.

- RESOLVED -
- (i) That the Schools Forum approved the proposals set out in the mainstream school funding formula consultation as far as possible when the updated APT and DSG settlement are received later this month.
 - (ii) That the Schools Forum noted the revised lower estimate of growth fund.
 - (iii) That the Schools Forum noted the revised position for planning for the new academy school.
 - (iv) That the Schools Forum approved the proposal to deal with any possible opening of a new academy school in September 2021 via the Growth Fund.
 - (v) That the Schools Forum noted the probable impact of the increase in FSM numbers on the affordability of the mainstream funding formula.

7 DATE AND TIME OF NEXT MEETING

The next meeting will be held at 2pm on 7 January 2021.

TITLE OF REPORT: DSG Funding Settlement

Purpose of the Report

1. To bring to Schools Forum attention the information received from the Department for Education (DfE) for the 2021/22 Dedicated Schools Grant (DSG) funding settlement, and the work being carried out to provide schools and early years providers with their budgets for 2021/22.

Background

2. The DfE issued the 2021/22 funding settlement on the 17 December 2020. Gateshead will receive an estimated £168.449m DSG for 2021/22 (before recoupment), which is an increase in funding of £11.708m from the £156.741m received for 2020/21.
3. The DfE announced allocations for the four main funding blocks of the DSG, which includes estimates for some areas. The four blocks are:
 - The Early Years Block - for 2 and 3 & 4 year old funding, including Early Years Pupil Premium
 - Schools Block – for mainstream schools
 - Central Schools Services Block – for retained duties, historic commitments and teaches pension employer contributions for centrally employed teachers.
 - High Needs Block - which includes special schools, PRU and high needs top-up and place funding
4. Due to the mainstreaming of some grants the comparison of the blocks has become more complicated, therefore new tables have been added to the report to aid the comparison between 2020/21 and 2021/22

The Early Years Block (EYB)

5. The Early Years National Funding Formula (EYNFF) was introduced in 2017/18. The hourly rate for Gateshead was £4.53 per hour. The funding rate for 2020/21 increased by £0.08 per hour giving an hourly rate of £4.61 And the hourly rate again has seen a small increase for 2021/22 of £0.06 to £4.67.
6. The EYNFF also includes funding for the increase to 30 hours for eligible children (from September 2017), the Maintained Nursery Supplement (MNS) and Early Years Disability Access Funding (EY DAF). There has been a reduction in the estimated universal hours for 3 & 4 year olds, but an increase in 30 hour provision for eligible children. There have also been increases in DAF, MNS and Early Years pupil premium (EYPP). The funding rates for DAF and EYPP have not changed, but the DfE have said that the MNS funding for September to March is conditional and therefore could be subject to change and therefore local authorities should treat them as unconfirmed.

7. 2 year old funding increased by £0.08 per hour from £5.28 to £5.36 per hour.
8. The estimated total early years allocation is £14.130m a decrease of £0.154m from the £14.284m received for 2020/21.
9. The MNS funding initial announcement for 2020/21 was £0.183m, which was then reduced in the July 20 updated settlement to £0.146m. The initial full year settlement for 2021/22 is £0.120m with only the first 5 months of funding guaranteed.
10. The actual funding allocations for 2, 3 and 4 year old funding will be updated in July 2021 following calculations using the January 2020 census.

Early Years Block Funding Comparison

| Element | 2020/21 | 2021/22 | Difference |
|---|----------|---------|------------------|
| 3 & 4 year old hourly rate | £4.61 | £4.67 | £0.06 |
| 2 Year old hourly rate | £5.28 | £5.36 | £0.08 |
| Maintained Nursery Schools Supplementary funding* | £183,295 | £49,973 | -£133,322 |

*Guaranteed initial allocation which are subject to change

The Central Schools Services Block (CSSB)

11. CSSB was new for 2018/19 and was created by taking elements that used to be top sliced from the schools block and transferred them into this new block. The transferred items include contributions to combined budgets, school admissions, Servicing of Schools Forum, Termination of Employment Costs, School Licences and the retained element of what was the Education Services Grant (ESG).
12. The CSSB for 2021/22 £1.511m which is a reduction of £0.032m from 2020/21 level of £1.543m. This reduction is made up of a number of elements as per the below table

| Element | 2020/21 | 2021/22 | Difference |
|---|-------------------|-------------------|------------------|
| CSSB Unit of Funding | £32.68 | £33.67 | £0.99 |
| Total Unit Funding | £780,708.86 | £803,618.70 | £22,909.87 |
| Additional Funding for Centrally Employed Teachers (CET and additional claims above initial allocations to schools) | £0 | £97,856.75 | £97,856.75 |
| Historic Commitments | £762,400 | £609,920 | -£152,480 |
| Decrease in Funding Excluding CET | £1,543,109 | £1,413,539 | -£129,570 |
| Overall Decrease in CSSD | £1,543,109 | £1,511,396 | -£31,713 |

The Schools Block (SB)

13. There are a number of elements used to calculate the overall funding of the SB, the Primary Unit of Funding (PUF), the Secondary Unit of Funding (SUF) and the historical based elements for private finance initiative (PFI) funded schools, premises factors,

growth funding and new for 2021/22 additional funding for the mainstreaming of teachers pay and pension grants.

14. The PUF and SUF for 2021/22 are based upon pupil attributes of the October 2019 census and therefore do not reflect any changes to date between October 2019 to October 2020. For 2021/22 the DfE have included an amount of funding in the PUF and SUF to mainstream the teachers pay and pension grants (TPPG)

| Element | 2020/21 | 2021/22 | TPPG | Difference Excluding TPPG | Difference Including TPPG |
|-------------------------|-----------------|-----------------|---------|---------------------------|---------------------------|
| PUF | £4,264.00 | £4,583.55 | £179.88 | £139.67 | £319.55 |
| SUF | £5,230.30 | £5,711.60 | £264.78 | £216.52 | £481.30 |
| Premises Factors | £4,253,854.00 | £4,179,365.00 | | | -£74,489.00 |
| Growth Funding | £974,700.00 | £607,005.00 | | | -£367,695.00 |
| TPPG | £0.00 | £5,064,543.00 | | | £5,064,543.00 |
| Total Schools Block | £115,718,093.00 | £124,515,496.00 | | | £8,797,403.00 |
| Primary Pupil Numbers | 14,964 | 14,709 | | | -255 |
| Secondary Pupil Numbers | 8,925.5 | 9,158.5 | | | 233 |

High Needs Block (HNB)

15. The 2019/20 HNB allocation (before recoupment) is £28.292m, which is an increase of £3.097m from the initial December 2020 settlement.

| Element | 2020/21 | 2021/22 | Difference |
|-------------------|-------------|-------------|------------|
| NFF | £22,589,602 | £24,765,718 | £2,176,116 |
| Basic Entitlement | £4,000 | £4,660 | £660 |
| TPPG | £0.00 | £87,692 | £87,692 |
| Total Funding | £25,195,602 | £28,292,290 | £3,096,688 |

Other Funding Information

16. The below grants will continue for 2021/22 but the rates per pupil for the following grants have not yet been published: -

- All the different types of pupil premium
- Universal Infant Free School Meals
- Primary PE and Sport Premium have not been announced for 2020/21 academic year. Further details will be available later in the year for Gateshead Schools grant allocations.
- Free School Meal Supplementary Grant has not yet been announced but it is expected to continue.
- It is not known if there will be any further COVID-19 catch up funding
- A second window for emergency COVID-19 opened and closed in December 2020
- The COVID-19 workforce grant was announced 23 November 2020. Detailed guidance was issued 15 December 2020 and the window for claiming will be announced in 2021.

Proposal

17. That Schools Forum notes the funding available in the individual DSG Blocks before any movement between the blocks. This information enables the individual school budgets to be calculated using the DfE's Authority Proforma Tool (APT) (subject to a later report), and notes the estimated amounts available for the Early Years Block, the Central Schools Services Block, the High Needs Block allocation, and the other grant information provided.

Recommendations

18. That Schools Forum:-

- Notes the estimated Early Years Block
- Notes the Central Schools Services Block
- Notes the Schools Block
- Notes the High Needs Block allocation
- Notes the other grant information

For the following reasons:-

- To enable individual school budgets to be calculated
- To provide DSG and grant funding information

CONTACT: Carole Smith Ext 2747

7 January 2021

TITLE OF REPORT: Mainstream Schools Funding

Purpose of the Report

1. To bring to Schools Forum the proposed Authority Proforma Tool (APT) for submission of Gateshead's Schools funding factors and values to the Department for Education (DfE) for approval, to enable the calculation of mainstream schools' individual school budgets for 2021/22.

Background

2. This report builds on reports to Schools Forum in November and December 2020 and previous agenda items.
3. Gateshead received the APT on the 15 of December 2020 and its Dedicated Schools Grant (DSG) funding settlement on 17 December 2020. Since receipt of the APT and the settlement, work has been undertaken to calculate mainstream individual school budgets.
4. The Schools and Early Years Finance Regulations for 2021 have not been issued but the Schools Revenue Funding 2021/22 – Operational Guidance, updated in December 2020 are available on the DfE's website.
5. The schools block (SB) allocation of funding for 2021/22 is £124.515m which is calculated:
 - Primary pupil numbers * Primary Unit of Funding (PUF) 14,709 x £4,583.55 = £67.419m
 - Secondary pupil numbers * Secondary Unit of Funding (SUF) 9,158.5 x £5,711.60 = £52.310m
 - Plus £4.179m for premises factors
 - The growth funding for 2021/22 is £0.607m
6. Therefore, the amount available to fund Gateshead mainstream schools in 2022/21 is £124.515m, an increase of £8.797m from 2020/21, but includes the increase in funding for the teachers pay and pension grants.
7. This funding has been used to calculate Gateshead mainstream schools' individual schools' budgets using the APT based on the agreed methodology and formula factors proposed.
8. Several inputs and adjustments were made to the APT prior to modelling. These included:
 - Input of estimated rates charges for 2021/22 and adjustments for actual rates charges for 2020/21 in comparison to the amount funded for 2020/21.
 - All schools including voluntary aided and voluntary controlled schools will pay rates, as the rate relief has been reduced from 100% to 80% for these schools.

- The DfE has not yet issued the updated rates data for academies.
- The PFI factor was re-calculated to take into account the changes in pupil numbers and updated PFI charges for 2021/22.
- De-delegation has been input as agreed at December's Schools Forum and will be updated if a later report is agreed.

Funding Pressures

9. There are a number of funding pressures for 2021/22 these are: -

- The increase in secondary pupils, KS4 have increased by 91 pupils, KS3 have increased by 143 and primary pupils have decreased by 254.
- Significant increases in FSM pupils.
- The DfE have changed the Income Deprivation Affecting Children Indices (IDACI) data set and bandings which has moved pupils between the bands.
- The premises funding received is £4.179m and is £0.085m less than the calculated premises factors of £4.264m.
- The increase in the minimum per pupil funding for primary schools has led to that factor distributing £0.854m to primary schools and £0.058m to secondary schools. This factor is not taken into account for capping and scaling.
- As the PUFs and SUFs are calculated using October 2019 data there is a lag in the units of funding which does not reflect the changes in data.

Data Changes

10. The APT contains an updated data set for the calculation of the mainstream school budgets, predominantly based on the October 2020 census. The updated data set was checked against last year's APT data to review the changes in data. There were found to be no unexpected changes in data for individual schools.

11. Overall, however there has been a significant increase in the number of current FSM children. Primary numbers have increased by 505 pupils and secondary by 413 pupils.

12. There have also been significant changes in the IDACI bandings due to the use of the updated data set (move from 2015 to 2019 data set) and the DfE has structured the band widths differently. IDACI band G is the least deprived and band A the most deprived. IDACI band G is not funded.

| | Primary Change in Funding Values | Secondary Change in Funding Values | Primary Change in Factor Numbers | Secondary Change in Factor Numbers | Total Change in Funding |
|--------------|----------------------------------|------------------------------------|----------------------------------|------------------------------------|-------------------------|
| FSM | £10.00 | £10.00 | 505.00 | 413.00 | £475,210.00 |
| FSM6 | -£22.00 | -£41.00 | -14.37 | 53.33 | -£173,881.26 |
| Total | | | | | £301,328.74 |

| | Primary Change in Funding Values | Secondary Change in Funding Values | Primary Change in Factor Numbers | Secondary Change in Factor Numbers | Total Change in Funding |
|---------------------|----------------------------------|------------------------------------|----------------------------------|------------------------------------|-------------------------|
| IDACI Band G | £0.00 | £0.00 | -663.13 | -264.40 | £0.00 |
| IDACI Band F | £5.00 | £10.00 | -161.81 | -2.09 | -£15,716.16 |
| IDACI Band E | £10.00 | £10.00 | 974.21 | 594.30 | £527,411.68 |
| IDACI Band D | £35.00 | £45.00 | -744.74 | -473.24 | -£529,596.74 |
| IDACI Band C | £40.00 | £50.00 | 335.89 | 278.58 | £362,694.97 |
| IDACI Band B | £40.00 | £55.00 | -156.54 | -29.21 | -£18,164.23 |
| IDACI Band A | £20.00 | £25.00 | 162.12 | 128.07 | £235,111.40 |
| Total | | | | | £561,740.91 |

Further information on this can be found in the Schools Revenue Funding 2021 to 2022 Operational Guide as per the below link.

[DfE external document template \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)

Modelling

13. Due to a different distribution of pupils between the primary and secondary phases, and the updated data set, when the mainstream school budgets were calculated using the agreed Schools Forum factor values, the formula was not affordable, and there was a funding short fall of £0.651m. There was no capping or scaling and minimum funding guarantee (MFG) was at +2% with total MFG funding of £0.527m. In this model 16 primary schools had per pupil gains of greater than 6%. As this formula was not affordable further modelling was undertaken.
14. A second model was developed with MFG at the minimum of +0.5%. With no capping or scaling there was still a shortfall in funding of £0.387m again with 16 primary schools having a funding increase of over 6% per pupil.
15. A third model was produced with MFG at 2% scaling at 100% and the cap set at just over 3%. This model distributed £0.527m in MFG and capped £0.651m of funding 12 primary schools still had gains of over 6% per pupil. There were only 2 schools that had a decrease in per pupil funding which was due to increases in pupil numbers and actual funding for these schools from 2020/21 to 2021/22 increased by 21% and 16%. Only schools that had a drop in pupil numbers had less actual funding in 2021/22 than 2020/21.
16. Appendix 1 is the proposed proforma

17. Appendix 2 shows the comparison between 2020/21 actual funding and the proposed funding before de-delegation using the updated data and the proposed factor values in appendix 1.

18. Appendix 3 shows 2020/21 factor values, the NFF factor values and the proposed factor values.

Proposal

19. That Schools Forum reviews the information and approves the factor values in appendix 1 and notes the information in appendix 2 and 3.

Recommendations

20. That Schools Forum approves the factor values in appendix 1 and notes the information in appendix 2 and 3.

For the following reasons: -

- To enable Gateshead mainstream schools funding to be calculated
- To enable the proforma to be submitted to the DfE within timescale
- 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 |

| Primary minimum per pupil funding level | Secondary (KS3 only) minimum per pupil funding level | Secondary (KS4 only) minimum per pupil funding level | Secondary minimum per pupil funding level | Disapplication number where alternative MPPF values are used |
|---|--|--|---|--|
| £4,180 | £5,215.00 | £5,715.00 | £5,415.00 | |

Pupil Led Factors

| 1) Basic Entitlement Age Weighted Pupil Unit (AWPU) | Reception uplift | No | Pupil Units | | 0.00 | | Total | Proportion of total pre MFG funding (%) | Notional SEN (%) | | |
|---|--|--------------------------|--|------------------------------------|---|------------|-------------|---|--------------------------|----------------------------|---------|
| | Description | Amount per pupil | Pupil Units | | Sub Total | | | | Notional SEN (%) | | |
| | Primary (Years R-6) | £3,123.00 | 14,710.00 | | £45,939,330 | | £88,214,737 | 37.04% | 5.00% | | |
| | Key Stage 3 (Years 7-9) | £4,404.00 | 5,690.00 | | £25,058,760 | | | | 13.88% | 5.00% | |
| | Key Stage 4 (Years 10-11) | £4,963.00 | 3,469.00 | | £17,216,647 | | | | | 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 | £460.00 | £460.00 | 3,946.00 | 2,265.00 | £2,857,060 | £13,501,288 | 10.89% | 23.00% | 19.00% | |
| | FSM6 | £575.00 | £881.00 | 4,268.20 | 2,940.81 | £5,045,070 | | | 23.00% | 19.00% | |
| | IDACI Band F | £215.00 | £310.00 | 1,637.39 | 1,070.39 | £683,860 | | | 0.00% | 0.00% | |
| | IDACI Band E | £260.00 | £415.00 | 2,719.45 | 1,597.38 | £1,369,971 | | | 0.00% | 0.00% | |
| | IDACI Band D | £410.00 | £580.00 | 1,284.32 | 765.19 | £970,383 | | | 0.00% | 0.00% | |
| | IDACI Band C | £445.00 | £630.00 | 901.32 | 580.64 | £766,890 | | | 0.00% | 0.00% | |
| | IDACI Band B | £475.00 | £680.00 | 926.63 | 565.86 | £824,937 | | | 23.00% | 19.00% | |
| | IDACI Band A | £620.00 | £865.00 | 887.11 | 500.70 | £983,117 | | | 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 March 19 | | | 183.42 | | £0 | | 0.00% | 0.00% | | |
| 4) English as an Additional Language (EAL) | EAL 3 Primary | £550.00 | | 888.65 | | £488,756 | £729,065 | 0.55% | 0.00% | | |
| | EAL 3 Secondary | | £1,485.00 | | 128.61 | £190,989 | | | 0.00% | 0.00% | |
| 5) Mobility | Pupils starting school outside of normal entry dates | £1,200.00 | £1,290.00 | 41.10 | 0.00 | £49,320 | | 0.04% | 0.00% | 0.00% | |
| | Description | Weighting | Amount per pupil (primary or secondary respectively) | 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) Low prior attainment | Primary low prior attainment | | £1,095.00 | 29.09% | 4,279.73 | £4,686,309 | £7,576,691 | 6.11% | 100.00% | | |
| | Secondary low prior attainment (year 7) | 64.53% | | 20.91% | | | | | | | |
| | Secondary low prior attainment (year 8) | 64.53% | | 20.82% | | | | | | | |
| | Secondary low prior attainment (year 9) | 63.59% | £1,660.00 | 18.21% | 1,741.19 | £2,890,381 | | | | | 100.00% |
| | Secondary low prior attainment (year 10) | 58.05% | | 16.90% | | | | | | | |
| | Secondary low prior attainment (year 11) | 48.02% | | 17.88% | | | | | | | |

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 | £117,800.00 | £117,800.00 | | | £8,835,000 | 7.12% | 0.00% | 0.00% |
| 8) Sparsity factor | £0.00 | £0.00 | | | £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 or the NFF weighting for any of the phases.

| Primary distance threshold (miles) | Primary pupil number average year group threshold | Fixed, tapered or NFF sparsity primary lump sum? | Fixed |
|--|---|--|-------|
| Secondary distance threshold (miles) | Secondary pupil number average year group threshold | Fixed, tapered or NFF sparsity secondary lump sum? | Fixed |
| Middle schools distance threshold (miles) | Middle school pupil number average year group threshold | Fixed, tapered or NFF sparsity middle school lump sum? | Fixed |
| All-through schools distance threshold (miles) | All-through pupil number average year group threshold | Fixed, tapered or NFF sparsity all-through lump sum? | Fixed |

| | | | |
|--------------------|--|------------|-------|
| 9) Fringe Payments | | £0 | 0.00% |
| 10) Split Sites | | £0 | 0.00% |
| 11) Rates | | £1,648,992 | 1.33% |
| 12) PFI funding | | £2,615,142 | 2.11% |

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 FY20-21 | £0 | 0.00% | 0.00% | 0.00% |
| Additional sparsity lump sum for small schools | £0 | 0.00% | 0.00% | |
| Exceptional Circumstance3 | £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% | |

| | | |
|--|---------------------|---------------|
| Total Funding for Schools Block Formula (excluding minimum per pupil funding level and MFG Funding Total) | £123,120,915 | 99.26% |
|--|---------------------|---------------|

| | | | |
|--|---------------------|----------------|-------|
| 14) Additional funding to meet minimum per pupil funding level | £911,949 | 0.74% | 0.00% |
| Total Funding for Schools Block Formula (excluding MFG Funding Total) | £124,032,864 | 100.00% | |

| | | | |
|---|---------------------|---------------------------------------|-------------------------|
| 15) Minimum Funding Guarantee | 2.00% | £526,810 | |
| Where a value less than 0.5% or greater than 2% has been entered please provide the disapplication reference number authorising the value | | | |
| Apply capping and scaling factors? (gains may be capped above a specific ceiling and/or scaled) | | Yes | |
| Capping Factor (%) | 3.03% | Scaling Factor (%) | 100.00% |
| Total deduction if capping and scaling factors are applied | | -£651,209 | |
| | Total (£) | Proportion of Total funding(%) | Notional SEN (%) |
| MFG Net Total Funding (MFG + deduction from capping and scaling) (Please note that the total deduction for capping and scaling is greater than the total MFG) | -£124,399 | -0.10% | 0.00% |
| Total Funding for Schools Block Formula | £123,908,465 | | £14,042,744 |

| | |
|---|-------------|
| 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) | £607,005.00 |
| Falling rolls fund (if applicable) | £0.00 |

| | |
|---|---------------------|
| Other Adjustment to 20-21 Budget Shares | £0 |
| Total Funding For Schools Block Formula (including growth and falling rolls funding) | £124,515,470 |
| % Distributed through Basic Entitlement | 71.12% |
| % Pupil Led Funding | 88.70% |
| Primary: Secondary Ratio | 1 : 1.28 |

Appendix 2

| | Minimum per pupil funding: additional funding to meet the primary minimum funding level | Minimum per pupil funding: additional funding to meet the secondary minimum funding level | 20-21 MFG Adjustment | 20-21 Post MFG Budget | Diff | Minimum per pupil funding: additional funding to meet the primary minimum funding level | Minimum per pupil funding: additional funding to meet the secondary minimum funding level | MFG Adjustment | Post MFG Budget | Difference | % change in total | per pupil % change taking account of TP&Tpen grants | £0.00 |
|---|---|---|----------------------|-----------------------|---------------|---|---|----------------|-----------------|---------------|-------------------|---|-------|
| | £341,605.00 | £98,808.00 | £313,707.00 | £114,989,710.00 | £8,918,754.00 | £854,094.00 | £57,854.00 | -£124,398.00 | £123,908,465.00 | £8,918,754.00 | 7.7% | | |
| Carr Hill Community Primary School | £0.00 | £0.00 | £0.00 | £1,450,137.53 | £118,556.51 | £0.00 | £0.00 | -£12,412.58 | £1,568,694.03 | £118,556.51 | 8.18% | 2.64% | 5 |
| Kelvin Grove Community Primary School | £0.00 | £0.00 | £0.00 | £1,530,275.16 | -£6,424.50 | £0.00 | £0.00 | £15,005.87 | £1,523,850.65 | -£6,424.50 | -0.42% | 2.54% | -21 |
| South Street Community Primary School | £0.00 | £0.00 | £0.00 | £1,165,277.31 | -£28,105.32 | £0.00 | £0.00 | -£13,794.78 | £1,137,171.99 | -£28,105.32 | -2.41% | 4.08% | -23 |
| Bede Community Primary School | £0.00 | £0.00 | £25,150.46 | £1,068,243.71 | -£3,288.57 | £0.00 | £0.00 | £16,331.51 | £1,064,955.15 | -£3,288.57 | -0.31% | 4.26% | -15 |
| Oakfield Junior School | £12,522.26 | £0.00 | £0.00 | £904,122.88 | £99,226.24 | £51,428.86 | £0.00 | £0.00 | £1,003,349.12 | £99,226.24 | 10.97% | 6.86% | -2 |
| Larkspur Community Primary School | £0.00 | £0.00 | £0.00 | £612,604.37 | £127,975.59 | £0.00 | £0.00 | -£2,344.73 | £740,579.96 | £127,975.59 | 20.89% | -0.81% | 19 |
| Oakfield Infant School | £0.00 | £0.00 | £0.00 | £690,703.50 | £22,317.41 | £6,423.75 | £0.00 | £0.00 | £713,020.91 | £22,317.41 | 3.23% | 6.28% | -13 |
| Ravensworth Terrace Primary School | £13,450.07 | £0.00 | £0.00 | £1,281,630.00 | £209,870.00 | £55,183.32 | £0.00 | £0.00 | £1,491,500.00 | £209,870.00 | 16.38% | 6.08% | 16 |
| Portobello Primary School | £0.00 | £0.00 | £0.00 | £777,876.77 | £52,210.44 | £0.00 | £0.00 | £3,072.14 | £830,087.22 | £52,210.44 | 6.71% | 1.65% | 1 |
| Birtley East Community Primary School | £0.00 | £0.00 | £0.00 | £964,279.99 | -£18,279.47 | £0.00 | £0.00 | £7,490.20 | £946,000.51 | -£18,279.47 | -1.90% | 2.97% | -17 |
| Dunston Hill Community Primary School | £0.00 | £0.00 | £0.00 | £1,751,919.47 | £118,433.72 | £0.00 | £0.00 | £2,232.96 | £1,870,353.19 | £118,433.72 | 6.76% | 1.40% | 5 |
| Emmaville Primary School | £80,176.35 | £0.00 | £0.00 | £1,464,316.75 | £174,888.00 | £114,625.47 | £0.00 | £0.00 | £1,639,204.75 | £174,888.00 | 11.94% | 6.32% | 2 |
| High Spen Primary School | £0.00 | £0.00 | £0.00 | £725,012.65 | £60,248.44 | £0.00 | £0.00 | -£412.11 | £785,261.09 | £60,248.44 | 8.31% | 2.24% | 3 |
| Swalwell Primary School | £0.00 | £0.00 | £9,715.29 | £699,666.60 | £10,969.47 | £0.00 | £0.00 | £7,550.57 | £710,636.07 | £10,969.47 | 1.57% | 2.67% | -6 |
| Winlaton West Lane Community Primary | £0.00 | £0.00 | £0.00 | £1,462,311.51 | £88,819.83 | £0.00 | £0.00 | £16,206.92 | £1,551,131.34 | £88,819.83 | 6.07% | 2.09% | -2 |
| Greenside Primary School | £0.00 | £0.00 | £57,326.04 | £811,961.01 | £21,190.07 | £0.00 | £0.00 | £52,816.01 | £833,151.08 | £21,190.07 | 2.61% | 2.36% | -7 |
| Blaydon West Primary School | £0.00 | £0.00 | £56,825.07 | £781,559.69 | £73,263.09 | £0.00 | £0.00 | £54,630.85 | £854,822.79 | £73,263.09 | 9.37% | 1.09% | 7 |
| Front Street Community Primary School | £10,178.90 | £0.00 | £0.00 | £1,526,862.00 | £154,578.00 | £83,632.66 | £0.00 | £0.00 | £1,681,440.00 | £154,578.00 | 10.12% | 6.30% | -4 |
| Highfield Community Primary School | £0.00 | £0.00 | £0.00 | £668,420.08 | £36,405.39 | £0.00 | £0.00 | £7,204.09 | £704,825.47 | £36,405.39 | 5.45% | 1.51% | 1 |
| Ryton Community Infant School | £0.00 | £0.00 | £0.00 | £420,701.37 | £42,226.30 | £0.00 | £0.00 | -£15,087.57 | £462,927.68 | £42,226.30 | 10.04% | 0.94% | 4 |
| Ryton Junior School | £0.00 | £0.00 | £0.00 | £648,820.49 | £1,487.32 | £0.00 | £0.00 | -£12,558.31 | £650,307.81 | £1,487.32 | 0.23% | 4.16% | -12 |
| Washingwell Community Primary School | £0.00 | £0.00 | £0.00 | £554,998.28 | £71,293.51 | £0.00 | £0.00 | £0.00 | £626,291.80 | £71,293.51 | 12.85% | 0.27% | 10 |
| Bill Quay Primary School | £0.00 | £0.00 | £0.00 | £817,482.07 | £77,105.23 | £0.00 | £0.00 | -£10,209.62 | £894,587.30 | £77,105.23 | 9.43% | 2.23% | 5 |
| Falla Park Community Primary School | £0.00 | £0.00 | £0.00 | £1,017,286.27 | £10,124.39 | £0.00 | £0.00 | -£18,917.32 | £1,027,410.67 | £10,124.39 | 1.00% | 3.47% | -12 |
| Brandling Primary School | £0.00 | £0.00 | £26,982.27 | £885,534.03 | £79,722.66 | £0.00 | £0.00 | £29,617.60 | £965,256.70 | £79,722.66 | 9.00% | 1.20% | 7 |
| Lingey House Primary School | £0.00 | £0.00 | £0.00 | £1,703,928.50 | £57,706.61 | £0.00 | £0.00 | £0.00 | £1,761,635.11 | £57,706.61 | 3.39% | 3.10% | -16 |
| The Drive Community Primary School | £0.00 | £0.00 | £0.00 | £831,485.62 | £97,012.89 | £0.00 | £0.00 | -£7,439.74 | £928,498.51 | £97,012.89 | 11.67% | 1.77% | 10 |
| White Mere Community Primary School | £0.00 | £0.00 | £0.00 | £596,765.83 | £47,529.48 | £0.00 | £0.00 | -£6,974.98 | £644,295.31 | £47,529.48 | 7.96% | 2.15% | 2 |
| Clover Hill Community Primary School | £0.00 | £0.00 | £0.00 | £800,646.90 | £65,762.10 | £31,200.41 | £0.00 | £0.00 | £866,409.00 | £65,762.10 | 8.21% | 4.93% | -3 |
| Crookhill Community Primary School | £0.00 | £0.00 | £0.00 | £813,338.11 | £63,911.74 | £0.00 | £0.00 | -£8,777.80 | £877,249.86 | £63,911.74 | 7.86% | 2.45% | 2 |
| Brighton Avenue Primary School | £0.00 | £0.00 | £36,207.66 | £1,400,453.05 | £71,172.36 | £0.00 | £0.00 | £43,591.02 | £1,471,625.41 | £71,172.36 | 5.08% | 1.98% | -2 |
| Lobley Hill Primary School | £0.00 | £0.00 | £0.00 | £1,545,672.37 | £9,004.03 | £0.00 | £0.00 | £0.00 | £1,554,676.40 | £9,004.03 | 0.58% | 3.14% | -25 |
| Wardley Primary School | £0.00 | £0.00 | £0.00 | £1,131,274.87 | £18,691.35 | £0.00 | £0.00 | -£23,745.52 | £1,149,966.23 | £18,691.35 | 1.65% | 3.43% | -15 |
| Glynwood Community Primary School | £0.00 | £0.00 | £14,277.96 | £1,642,010.43 | £135,069.33 | £0.00 | £0.00 | £0.00 | £1,777,079.75 | £135,069.33 | 8.23% | 2.12% | 6 |
| Barley Mow Primary School | £0.00 | £0.00 | £2,432.58 | £791,638.46 | -£17,274.70 | £0.00 | £0.00 | £0.00 | £774,363.76 | -£17,274.70 | -2.18% | 4.05% | -16 |
| Windy Nook Primary School | £0.00 | £0.00 | £0.00 | £1,184,625.46 | £82,904.73 | £0.00 | £0.00 | -£4,506.43 | £1,267,530.19 | £82,904.73 | 7.00% | 2.78% | -1 |
| Colegate Community Primary School | £0.00 | £0.00 | £0.00 | £700,606.75 | £36,365.95 | £0.00 | £0.00 | -£6,370.66 | £736,972.70 | £36,365.95 | 5.19% | 2.80% | -2 |
| Roman Road Primary School | £0.00 | £0.00 | £0.00 | £959,930.14 | £36,005.53 | £0.00 | £0.00 | £8,705.02 | £995,935.67 | £36,005.53 | 3.75% | 2.10% | -4 |
| Fellside Community Primary School | £18,513.84 | £0.00 | £0.00 | £811,258.25 | £87,202.00 | £51,560.17 | £0.00 | £0.00 | £898,460.25 | £87,202.00 | 10.75% | 6.30% | -1 |
| Fell Dyke Community Primary School | £0.00 | £0.00 | £1,939.34 | £1,311,765.45 | £16,704.43 | £0.00 | £0.00 | £0.00 | £1,328,469.88 | £16,704.43 | 1.27% | 2.66% | -13 |
| Caedmon Community Primary School | £0.00 | £0.00 | £0.00 | £1,004,430.13 | £82,765.66 | £0.00 | £0.00 | £0.00 | £1,087,195.79 | £82,765.66 | 8.24% | 2.37% | 4 |
| Kells Lane Primary School | £162,510.49 | £0.00 | £0.00 | £1,591,804.50 | £172,172.00 | £225,848.15 | £0.00 | £0.00 | £1,763,976.50 | £172,172.00 | 10.82% | 6.33% | -2 |
| Chopwell Primary School | £0.00 | £0.00 | £0.00 | £899,136.72 | £32,633.17 | £0.00 | £0.00 | £0.00 | £931,769.89 | £32,633.17 | 3.63% | 2.71% | -5 |
| Parkhead Community Primary School | £0.00 | £0.00 | £0.00 | £1,279,958.66 | £9,782.48 | £0.00 | £0.00 | -£15,252.01 | £1,289,741.15 | £9,782.48 | 0.76% | 3.52% | -20 |
| St Aidan's Church of England Primary | £0.00 | £0.00 | £0.00 | £947,037.78 | £45,160.98 | £0.00 | £0.00 | £18,253.96 | £992,198.76 | £45,160.98 | 4.77% | 1.98% | -2 |
| Harlow Green Community Primary | £0.00 | £0.00 | £0.00 | £1,767,689.06 | £115,690.48 | £0.00 | £0.00 | -£27,553.89 | £1,883,379.54 | £115,690.48 | 6.54% | 2.86% | -1 |
| Rowlands Gill Community Primary | £0.00 | £0.00 | £0.00 | £1,222,753.15 | -£56,022.09 | £0.00 | £0.00 | -£24,766.82 | £1,166,731.06 | -£56,022.09 | -4.58% | 4.50% | -26 |
| Whickham Parochial Church of England | £12,362.03 | £0.00 | £0.00 | £791,839.25 | £85,338.00 | £48,947.68 | £0.00 | £0.00 | £877,177.25 | £85,338.00 | 10.78% | 6.32% | -1 |
| Corpus Christi Catholic Primary School | £0.00 | £0.00 | £0.00 | £874,591.93 | £52,177.56 | £0.00 | £0.00 | -£1,742.42 | £926,769.49 | £52,177.56 | 5.97% | 2.86% | -2 |
| St Joseph's Roman Catholic Voluntary | £0.00 | £0.00 | £0.00 | £827,388.35 | £68,343.96 | £0.00 | £0.00 | -£2,281.08 | £895,732.31 | £68,343.96 | 8.26% | 2.44% | 3 |
| St Oswald's Roman Catholic Voluntary | £0.00 | £0.00 | £0.00 | £891,831.85 | £56,535.61 | £0.00 | £0.00 | -£815.82 | £948,367.46 | £56,535.61 | 6.34% | 2.80% | -1 |
| St Peter's Roman Catholic Voluntary | £6,455.91 | £0.00 | £0.00 | £809,131.97 | £62,486.47 | £38,951.56 | £0.00 | £0.00 | £871,618.44 | £62,486.47 | 7.72% | 6.27% | -7 |
| St Joseph's Catholic Junior School, | £0.00 | £0.00 | £0.00 | £532,779.67 | -£581.19 | £0.00 | £0.00 | -£10,121.61 | £532,198.48 | -£581.19 | -0.11% | 4.32% | -9 |
| St Joseph's Catholic Infant School, | £0.00 | £0.00 | £0.00 | £376,488.38 | £61,939.33 | £0.00 | £0.00 | -£7,068.65 | £438,427.71 | £61,939.33 | 16.45% | -1.06% | 9 |
| St Agnes' Catholic Primary School | £11,297.76 | £0.00 | £0.00 | £764,883.59 | £73,938.43 | £39,027.81 | £0.00 | £0.00 | £838,822.02 | £73,938.43 | 9.67% | 6.24% | -3 |
| St Joseph's Roman Catholic Voluntary | £0.00 | £0.00 | £7,429.87 | £465,089.80 | £33,417.85 | £0.00 | £0.00 | £2,305.82 | £498,507.65 | £33,417.85 | 7.19% | 1.06% | 2 |
| St Mary and St Thomas Aquinas Catholic | £14,137.59 | £0.00 | £0.00 | £793,962.69 | £96,255.48 | £38,099.79 | £0.00 | £0.00 | £890,218.17 | £96,255.48 | 12.12% | 6.50% | 1 |
| St Philip Neri Roman Catholic Primary | £0.00 | £0.00 | £0.00 | £807,521.16 | £20,136.05 | £0.00 | £0.00 | -£131.74 | £827,657.21 | £20,136.05 | 2.49% | 3.37% | -9 |
| St Joseph's Catholic Primary School, | £0.00 | £0.00 | £0.00 | £846,102.65 | £58,416.90 | £0.00 | £0.00 | -£9,488.73 | £904,519.55 | £58,416.90 | 6.90% | 2.83% | -1 |
| St Mary's Roman Catholic Primary School | £0.00 | £0.00 | £0.00 | £794,266.51 | £61,320.70 | £33,349.11 | £0.00 | £0.00 | £855,587.21 | £61,320.70 | 7.72% | 6.34% | -7 |
| St Alban's Catholic Primary School | £0.00 | £0.00 | £0.00 | £819,032.28 | £24,218.74 | £0.00 | £0.00 | -£27,805.59 | £843,251.02 | £24,218.74 | 2.96% | 3.36% | -9 |
| St Augustine's Catholic Primary School | £0.00 | £0.00 | £0.00 | £1,292,209.43 | £17,729.58 | £0.00 | £0.00 | £0.00 | £1,309,939.01 | £17,729.58 | 1.37% | 2.31% | -16 |
| St Wilfrid's Roman Catholic Voluntary | £0.00 | £0.00 | £27,675.71 | £668,879.74 | -£34,222.42 | £0.00 | £0.00 | £21,395.78 | £634,657.32 | -£34,222.42 | -5.12% | 4.04% | -15 |
| Kingsmeadow Community | £0.00 | £0.00 | £46,949.45 | £5,517,095.11 | £709,856.45 | £0.00 | £0.00 | £199,569.28 | £6,226,951.55 | £709,856.45 | 12.87% | 3.04% | 44 |
| Kibblesworth Academy | £0.00 | £0.00 | £0.00 | £683,378.91 | £8,970.61 | £0.00 | £0.00 | -£9,674.88 | £692,349.53 | £8,970.61 | 1.31% | 3.63% | -10 |
| Riverside Primary Academy | £0.00 | £0.00 | £0.00 | £1,193,328.30 | £67,519.45 | £0.00 | £0.00 | £16,693.19 | £1,260,847.76 | £67,519.45 | 5.66% | 1.84% | -1 |
| St Anne's Catholic Primary School | £0.00 | £0.00 | £0.00 | £632,541.54 | £30,322.79 | £0.00 | £0.00 | £4,137.44 | £662,864.34 | £30,322.79 | 4.79% | 1.77% | -1 |
| Sacred Heart Catholic Primary School | £0.00 | £0.00 | £796.20 | £921,346.11 | £96,535.89 | £35,816.24 | £0.00 | £0.00 | £1,017,882.00 | £96,535.89 | 10.48% | 4.64% | 2 |
| Thorp Academy | £0.00 | £0.00 | £0.00 | £4,628,808.60 | £1,049,194.30 | £0.00 | £0.00 | -£50,693.64 | £5,678,002.90 | £1,049,194.30 | 22.67% | 2.57% | 124 |
| Heworth Grange School | £0.00 | £0.00 | £0.00 | £5,860,625.36 | £699,563.73 | £0.00 | £0.00 | -£98,573.02 | £6,560,189.09 | £699,563.73 | 11.94% | 2.86% | 41 |
| Grace College | £0.00 | £0.00 | £0.00 | | | | | | | | | | |

Appendix 3

Factors Unit Values

| | New NFF | 2020/21 | Diff | Proposed |
|-------------------------------------|------------|----------|--------|----------|
| Basic per pupil Funding | | | | |
| Primary AWPU | £3,123 | £2,857 | £266 | £3,123 |
| KS3 AWPU | £4,404 | £4,018 | £386 | £4,404 |
| KS4 AWPU | £4,963 | £4,561 | £402 | £4,963 |
| Primary Minimum Per Pupil funding | £4,180 | £3,750 | £430 | £4,180 |
| Secondary Minimum Per Pupil funding | £5,415 | £5,000 | £415 | £5,415 |
| Primary FSM | £460 | £450 | £10 | £460 |
| Secondary FSM | £460 | £450 | £10 | £460 |
| Primary FSM6 | £575 | £597 | -£22 | £575 |
| Secondary FSM6 | £840 | £922 | -£82 | £881 |
| Primary IDACI A | £620 | £600 | £20 | £620 |
| Primary IDACI B | £475 | £435 | £40 | £475 |
| Primary IDACI C | £445 | £405 | £40 | £445 |
| Primary IDACI D | £410 | £375 | £35 | £410 |
| Primary IDACI E | £260 | £250 | £10 | £260 |
| Primary IDACI F | £215 | £210 | £5 | £215 |
| Secondary IDACI A | £865 | £840 | £25 | £865 |
| Secondary IDACI B | £680 | £625 | £55 | £680 |
| Secondary IDACI C | £630 | £580 | £50 | £630 |
| Secondary IDACI D | £580 | £535 | £45 | £580 |
| Secondary IDACI E | £415 | £405 | £10 | £415 |
| Secondary IDACI F | £310 | £300 | £10 | £310 |
| Low Prior Attainment | | | | |
| Primary LPA | £1,095 | £1,065 | £30 | £1,095 |
| Secondary LPA | £1,660 | £1,610 | £50 | £1,660 |
| English as an Additional Language | | | | |
| Primary EAL | £550 | £535 | £15 | £550 |
| Secondary EAL | £1,485 | £1,440 | £45 | £1,485 |
| Primary Mobility | £900 | £1,500 | -£600 | £1,200 |
| Secondary Mobility | £1,290 | £1,500 | -£210 | £1,290 |
| Primary lump sum | £117,800 | £114,400 | £3,400 | £117,800 |
| Secondary lump sum | £117,800 | £114,400 | £3,400 | £117,800 |

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TITLE OF REPORT: De – Delegation Trade Union Facility Time and Maternity Credits

Purpose of the Report

1. The purpose of the report is to bring to Schools Forum options for them to consider for de-delegation so that maintained schools by phases (primary and secondary schools) can consult with their sector on the options for de-delegation.

Background

2. De-delegation is the process by which Schools Forum can agree for the LA to centrally hold funding for specific purposes.
3. Revenue funding arrangements for schools changed following the school funding review which commenced in 2013/14. It is now not permissible for LA's to hold budgets centrally for the provision of some services to schools. This previously centrally held funding has been delegated to schools on a per pupil basis.
4. However there are some areas that schools have the option for de-delegation.

These are:-

- a) Contingencies, (including support for schools in financial difficulties, new/closing/amalgamating schools, closing school deficits and growing schools)
 - b) Behaviour Support Services
 - c) Support for minority ethnic minority pupils or underachieving groups
 - d) Free School Meals (FSM) eligibility
 - e) Insurance
 - f) Library and museum services
 - g) Licences/subscriptions
 - h) Staff costs – supply cover (long term sickness, maternity, trade union and public duties)
5. For each of these areas, it is for the Schools Forum members in the relevant phase (primary or secondary) to decide whether that service should be retained centrally.
 6. The decision will apply to all maintained schools in that phase and will mean that the funding for these services will be removed from the formula before school budgets are issued. There can be different decisions for each phase.
 7. Academies, special schools, the behaviour support service and nursery schools can buy back into these services if they wish to.
 8. This report brings proposals for Staff Costs –Maternity Credits and Trade Union Facility Time (TUFT).

Maternity Credits

9. Under the current Maternity Credits scheme, schools can claim from the 7th to the 18th week for maternity or adoption leave at a specified daily rate depending on the staff role.

Trade Union Facility Time

10. The TUFT credits facilitate the recognised trade union reps undertaking the following duties on behalf of all schools and individual members as required:-

- Attendance at LA meetings and briefings re policy decisions
- Attending school based meetings to resolve staffing issues, facilitate return to work interviews, capability meetings and disciplinary meetings

11. Having a central Trade Union resource will benefit all schools as it will negate the need for additional training for staff in every school, ensure a consistent approach and bring economies of scale savings.

12. There is a proposal to review the below charges for future years to ensure all costs are covered.

Proposal

13. It is proposed for the January submission of the APT the level of de-delegation is maintained for TUFT and maternity credits at the below rates:-

- | | |
|-----------------------------|-----------------|
| • Maternity Credits | £8.00 per pupil |
| • Trade Union Facility Time | £4.00 per pupil |

Recommendations

14. That School Forum consults with their respective phases on the possible areas of de-delegation and brings their views to enable Schools Forum to make a decision on de-delegation.

For the following reason(s):

15. To enable Schools Forum to make a decision on mainstream school de-delegation for TUFT and Maternity Credits and enable mainstream school budgets to be calculated.

CONTACT: Carole Smith Ext. 2747

TITLE OF REPORT: Education Services Grant Transfer

Purpose of the Report

1. The purpose of this report is to request Schools Forums approval to centrally retain the former retained duties element of the Education Services Grant (ESG) which was mainstreamed into the Dedicated Schools Grant (DSG) from April 2017.

Background

2. The former ESG retained duties funding rate for local authorities is a flat rate of £15 per pupil.
3. The broad duties covered by the retained duties funding relate to the following areas:-
 - Director of children's services and personal staff for director
 - Planning for the education service as a whole
 - Revenue budget preparation, preparation of information on income and expenditure relating to education, and external audit relating to education
 - Authorisation and monitoring of expenditure not met from schools' budget shares
 - Formulation and review of local authority schools funding formula
 - Internal audit and other tasks related to the authority's chief finance officer's responsibilities under Section 151 of LGA 1972 except duties specifically related to maintained schools
 - Consultation costs relating to non-staffing issues
 - Plans involving collaboration with other LA services or public or voluntary bodies
 - Standing Advisory Committees for Religious Education (SACREs)
 - Provision of information to or at the request of the Crown other than relating specifically to maintained schools
4. In addition to the retained duties above, local authorities will also have duties that are required to be performed for maintained schools only, which have not been funded since September 2017.
5. The retained duties funding is calculated using the total headcount of pupils in primary and secondary schools contained in the December settlement.
6. The DSG allocation received in December 2020 was based on 23,867.50 pupils and the retained duties element is calculated $£15 \times 23,867.50 = £358,012.5$.

7. The current regulations state that ESG retained duties funding, now included in the DSG, requires Schools Forum approval for the local authority to retain this funding centrally.

Proposal

8. That Schools Forum approves the central retention of the allocation for retained duties.

Recommendations

9. It is recommended that Schools Forum approves the central retention of funding allocated for retained duties.

For the following reasons:

10. To provide funding to enable the local authority to carry out their retained duties.

CONTACT: Carole Smith Ext. 2747



REPORT TO SCHOOLS FORUM

7 January 2021

TITLE OF REPORT: Directed Revisions to the Scheme for Financing Schools Consultation Response

Purpose of the Report

1. This report brings to Schools Forums the results of the Consultation held with all maintained schools between the 13 November 2020 and 1 December 2020 and builds on a report brought to Schools Forum in November 2020.

Background

2. On 5 August 2020 the Department for Education (DfE) published new statutory guidance for local authorities on the Scheme for Financing Schools. The full guidance is available on the below link.

<https://www.gov.uk/government/publications/schemes-for-financing-schools/schemes-for-financing-local-authority-maintained-schools>

3. Under sections 48 of the School Standards and Framework Act 1998 and schedule 14 to the Act, each local authority must publish a Scheme for Financing Schools. The Scheme sets out the financial relationship between the Authority and the maintained schools which it funds, it contains requirements relating to financial management and associated issues, binding on both the Authority and schools.
4. The directed revisions state that all maintained schools must be consulted on any updates to the Scheme and receive approval of the members of Schools Forum representing maintained schools. The revised amendments must be published on a website accessible to the public.
5. The Scheme covers all Community, Voluntary Aided and Foundation schools and covers all sectors- Nursery, Primary, Secondary, PRU's and Special Schools. Academies and Free Schools are not covered by the Scheme.
6. It is anticipated that updates made to the guidance will be mirrored by changes in the Schools and Early Years Finance (England) Regulations expected to be published before the start of the new financial year.

Directed Revisions to the Scheme

7. The main changes are summarised below:

Mandatory inclusions in the Scheme of:

Section 2.4: Submission of financial forecasts

8. From the 2021 to 2022 funding year each school must submit a 3-year budget forecast each year, at a date determined by the local authority between 1 May and 30 June.
9. Local authorities should consider the extent to which such forecasts may be used for more than just confirming schools are undertaking effective financial planning or not. For instance, they could be used as evidence to support the local authority's assessment of schools financial value standards or used in support of the authority's balance control mechanism.
10. Local authorities must inform schools of the purposes for which they intend to use these 3-year budget forecasts: such a forecast may be used in conjunction with an authority's balance control mechanism.
11. Following consultation that closed on 30 September 2019, the Secretary of State directs that the text below shall be incorporated into the schemes of all local authorities in England, however due to coronavirus (COVID-19) the directed revision to follow will only be expected to be enforced from the 2021 to 2022 funding year.

Section 4.5: Planning for deficit budgets

12. Schools must submit a recovery plan to the local authority when their revenue deficit rises above 5% at 31 March of any year. Local authorities may set a lower threshold than 5% for the submission of a recovery plan if they wish. The 5% deficit threshold will apply when deficits are measured as at 31 March 2021.

Other Revisions

Section 2.5 Efficiency and Value for Money

13. Wording updated to better reflect DfE guidance.

Section 2.9 Audit of Private Funds

14. Wording added to for clarity to ensure that maintained schools understand that non-compliance with the provision of an audit certificate of within 3 months of the fund year end will be a breach of the scheme and as such will be reported to Internal Audit, the Strategic Director, Resources and Digital, and Strategic Director, Children's Adults and Families, and the Chair of Governors.

Section 3.2 Proportion of Budget Share

15. A sentence was added for clarity on the availability of budget shares for maintained schools.

Section 4.2 Reporting on the Intended Use of Surplus Balances

16. Wording updated due to the request of Schools Forum to suspend the surplus balance procedure.

Section 4.8 Licensed Deficits

17. Wording updated to make it clear that the local authority is prohibited from writing off deficit budgets, and that the only financial assistance for a maintained mainstream school can be funded from a de-delegated centrally held contingency budget agreed by Schools Forum.

Section 10: Insurance

18. The Secretary of State decided that from 1 April 2020 local authority maintained schools (LAMS) will be able to join the risk protection arrangements. The Department of Education (DfE) have changed the guidance as below.

19. Instead of taking out insurance, a school may join the Secretary of State's risk protection arrangement (RPA) for risks that are covered by the RPA.

20. Wording has been updated to reflect the above requirement

Annex A – List of schools the scheme applies to

21. Updated for schools converting to academies

Annex D - Applying to set a Deficit Budget

22. Updated to comply with the directed revisions to the Scheme
There have also been some title changes to reflect changes in the Council's structure.

23. The Scheme and the dates of any amendments will be updated and published on Gateshead Councils Website.

Consultation Response

24. There were no responses to the consultation on the mandatory and proposed changes to Gateshead's Scheme for Financing Schools.

Proposal

25. That Schools Forum notes that there were no responses to the consultation on the mandatory and proposed changes to Gateshead's Scheme for Financing Schools and as such all the mandatory and proposed changes should be accepted. That the Scheme will come into force 1 April 2021 to give schools time to plan for the changes in requirements.

Recommendations

26. It is recommended that: -

- Schools Forum notes that there were no responses to the consultation on Gateshead's Scheme for Financing Schools
- Schools Forum approves the mandatory and proposed changes to Gateshead's Scheme for financing Schools.
- Schools Forum approves the proposal that the changes to the Scheme to come into force 1 April 2021
- Schools Forum notes that a copy of the updated Scheme will be available on the Council's website and a copy will be sent out to all maintained schools.

For the following reason(s):

- To ensure compliance with the Schools Standards and Framework Act 1998 and schedule 14 to the Act.
- To provide the updated Scheme for Gateshead's maintained schools in line with requirements.

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