

REPORT TO SCHOOLS FORUM

27 September 2018

Item 5

TITLE OF REPORT: Mainstream School Funding Review

Purpose of the Report

To update Schools Forum on the first meeting of the Mainstream School Funding Review Group, sub group of Schools Forum for 2019/20 mainstream school budgets.

Background

Information in reports 3 and 4 were taken into consideration at the first meeting of the sub group 19 September 2018.

The group considered the information in the reports 3 and 4 and the noted the longer timeframe now available until the national funding formula (NFF) is implemented. Local authorities will still have a role in setting local mainstream funding formula to 2020/21 which is an additional year from the original 2019/20.

The group reviewed the previously agreed principles, set out below, and funding aims to ensure they were still fit for purpose and the group agreed to propose the amendment to extend the time for the phasing for an additional year to 2020/21 in principle.

Principles

- An affordable equitable and transparent mainstream school funding formula
- A formula that will focus only on mainstream school age range not taking other age ranges into account (e.g. post 16 or 2, 3 & 4 year olds)
- A formula that where possible prepares schools for the National Funding Formula (NFF) and moves Gateshead's formula in the direction of travel towards the NFF

Funding Aims

- Phase the changes required over the next 2 funding periods (2019/20 and 2020/21)
- 1:129 primary secondary ratios
- 3% funding gains cap
- Positive MFG if possible
- Minimise the value of MFG

The group were taken through phasing options to the NFF. The current formula and original phase 2 formula are shown in appendix 1. Appendix 2shows the current formula and proposed extended phasing over 2019/20 and 2020/21.

Proposal

It is proposed that Schools Forum approves the funding aims and principles to be used for the calculation of 2019/20 mainstream school budgets with the extended timeframe to 2020/21 and the use of the new phase 2 funding factors in appendix 2 as a starting point for the calculation of mainstream school budgets for 2019/20.

Recommendations

It is recommended that Schools Forum approves the funding aims and principles to be used for the calculation of 2019/20 mainstream school budgets with the extended timeframe to 2020/21 and the use of the new phase 2 funding factors in appendix 2 as a starting point for the calculation of mainstream school budgets for 2019/20.

For the following reasons: -

 To provide a clear direction of travel for the calculation of mainstream school funding for 2019/20 and to provide as smooth a transition as possible to the NFF for Gateshead mainstream schools.

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Appendix 1

Original Phase 2 Funding Factors

									Phase 2	from 2018/19
		2018/19		NFF					2019/20	
1) Basic							Difference Difference		Phase 2	
Entitlem	Description	Amount per pupil		Amount per pupil NFF			AWPU			
ent	Primary (Years R-6)	2,852.33		2,746.99			-105.34		£2,799.	56
Age	Key Stage 3 (Years 7-9)	3,830.43		3,862.65			32.22			65 over P2
_	Key Stage 4 (Years 10-11)	4,385.81		4,385.81			0.00		£4,385.	
	,g (= = = = = = = = = = = = = = =	Primary Secondary		Primary	Secondary		Primary	Secondary	Primary	
	Description	amount	amount	amount	amount		amount	amount		er amount per
		per pupil	per pupil	per pupil	per pupil		per pupil	per pupil	pupil	pupil
	Current FSM	440.00	440.00	440.00	440.00		0.00	0.00	£440.	
	FSM6 % Primary	746.67		540.00			-206.67		£643.	
	FSM6 % Secondary		1,195.00		785.00		0.00	-410.00		£990.00
2)	IDACI Band F	200.00	193.33	200.00	290.00		0.00	96.67	£200.	
1 '	IDACI Band E	160.00	260.00	240.00	390.00		80.00	130.00	£160.	
on	IDACI Band D	355.92	482.08	360.00	515.00		4.08	32.92	£355.	
	IDACI Band C	397.50	533.43	390.00	560.00		-7.50	26.57	£393.	
	IDACI Band B	461.00	600.00	420.00	600.00		-41.00	0.00	£440.	
	IDACI Band A	726.67	910.37	575.00	810.00		-151.67	-100.37	£650.	
3)			0.20101	0.0.00						
Looked		Primary	Secondary	Primary	Secondary		Primary	Secondary		
After	Description	amount	amount	amount	amount		amount	amount		
Children	Description	per pupil	per pupil	per pupil	per pupil		per pupil	per pupil		
(LAC)		per papir	per papir	per papir	per papir		per papir	per papir		
4) English	LAC X March 16	1,00	0.00	0.	00		-1,000.00	-1,500.00	£500.	00 £500.00
as an	EAL 3 Primary	515.00		515.00			0.00		£515.	00
5) Mobility	EAL 3 Secondary		1,385.00		1,385.00			0.00		£1,010.00
				Cash Lu	mp Sum					
	Pupils starting school outside	2,000.00	2,000.00	£193,00 Historic			0.00	0.00		
	of normal entry dates								£2,000.	00 £2,000.00
	Description		Amount per pupil		Amount		Weightin	Amount		
		Weighting		Weighting	per pupil		g	per pupil		
c) p :	Low Attainment % new EFSP	0.70	563.33	1.00	1,022.00	4 050 00	0.30			£806.67
6) Prior	Low Attainment % old FSP 73					1,050.00		458.67		
attainme nt	Secondary low attainment (year 7)	0.48	828.33	0.48	1,550.00	1,385.00	0.00			£1,106.67
	Secondary low attainment									22,200.07
	(years 8 to 11)							721.67		
Other Fac	,									
Factor		per Primary	Lump Sum per Secondary School (£)	per Primary	per Secondary		Lump Sum per Primary School (£)	Lump Sum per Secondary School (£)		
7) Lump										
Sum		113,333.33	130,000.00	110,000.00	110,000.00		-3,333.33	-20,000.00	£111,666.	67 £120,000.00
		At NFF								
		At Phase								
			duction from curren							
		Increase fro	om current	formula						

Appendix 2

Proposed Phase 2 and 3 Funding Factors

		201	8/19	NI NI	FF				2019/20		2020/21	
1) Basic		201	0/ 13	IN	1.11		Difference	Difference	New Phas	e 2	Phase 3	
Entitlem	Description	Amount	per pupil	Amount no	r pupil NFF		AWPU	Difference	ivew riids	e 2	riiase s	
ent	Primary (Years R-6)		52.33	2,746.99	i pupii ivrr		-105.34		£2,817.22		£2,782.10	
Age	Key Stage 3 (Years 7-9)		30.43	3,862.65			32.22		£3,841.17		£3,851.91	
Weighte	Key Stage 4 (Years 10-11)			4,385.81			0.00		£4,385.81		£4,385.81	OverF3
weignte	Rey Stage 4 (Teals 10-11)	4,385.81 Primary Secondary		Primary	Secondary			Secondary		Secondary	Primary	Secondary
	Description	amount	amount	amount	amount		Primary amount	amount	amount	amount		amount per
	Description	per pupil	per pupil	per pupil	per pupil		per pupil	per pupil		per pupil	pupil	pupil
	Current FSM	440.00	440.00	440.00	440.00		0.00	0.00	£440.00		£440.00	£440.00
	FSM6 % Primary	746.67	440.00	540.00	440.00		-206.67	0.00	£677.78		£608.89	
	FSM6 % Secondary	740.07	1,195.00	340.00	785.00		0.00	-410.00	10/7.76	£1,058.33	1000.03	£921.67
2)	IDACI Band F	200.00	193.33	200.00	290.00		0.00	96.67	£200.00		£200.00	
2) Deprivati	IDACI Band E	160.00	260.00	240.00	390.00		80.00	130.00	£186.67		£213.33	£346.67
on	IDACI Band D	355.92	482.08	360.00	515.00		4.08	32.92	£357.28		£358.64	£504.03
OII							-7.50		£395.00			
	IDACI Band C	397.50	533.43	390.00	560.00			26.57			£392.50	
	IDACI Band B	461.00	600.00	420.00	600.00		-41.00	0.00	£447.33		£433.67	£600.00
a)	IDACI Band A	726.67	910.37	575.00	810.00		-151.67	-100.37	£676.11	£876.91	£625.56	£843.46
3)												
Looked		Primary	Secondary	Primary	Secondary		Primary	Secondary				
After	Description	amount	amount	amount	amount		amount	amount				
Children		per pupil	per pupil	per pupil	per pupil		per pupil	per pupil				
(LAC)												
	LAC X March 16		0.00		00		-1,000.00	-1,500.00	£666.67		£333.33	£333.33
as an	EAL 3 Primary	515.00		515.00			0.00		£515.00		£515.00	
5) Mobility	EAL 3 Secondary		1,385.00		1,385.00			0.00		£1,385.00		£1,385.00
	Dunile starting school outside			Cash Lump Sum £193,00 Historic				0.00				
	Pupils starting school outside	2,000.00	2,000.00				0.00					
	of normal entry dates			Fun	ding				£2,000.00	£2,000.00	£2,000.00	£2,000.00
			Amount		Amount		Weightin	Amount				
	Description	Weighting	per pupil	Weighting	per pupil		g	per pupil				
	Low Attainment % new EFSP	0.70		1.00			0.30			£716.22		£869.11
6) Prior	Low Attainment % old FSP 73		563.33		1,022.00	1,050.00		458.67				
attainme	Secondary low attainment											
nt	(year 7)	0.48		0.48			0.00			£1,068.89		£1,309.44
	Secondary low attainment		828.33		1,550.00	1,385.00		704.67				,
	(years 8 to 11)							721.67				
Other Fac	tors											
							Lump					
		Lump Sum		Lump Sum			Sum per	Lump Sum				
Factor		per	per	per	per		Primary	per				
		Primary	Secondary	. ,	Secondary		School School	Secondary				
		School (£)	School (£)	School (£)	School (£)		(£)	School (£)				
7) Lump												
Sum		113,333.33	130,000.00	110,000.00	110,000.00		-3,333.33	-20,000.00	112222 2	123333.33	f111,111 11	£116,666.67
-3111										123333.33	,	
		At NFF										
		At Phase										
		<u> </u>	Reduction from current formula									
		Increase from current formula										
		micrease III	om current	omula								