

West Berkshire Schools' Forum	
Title of Report:	Update on 2014/15 Growth Fund and Falling Rolls Fund
Date of Meeting:	19th January 2015
Contact Officer(s)	Claire White
For Information	

1. Background

1.1 Under current school funding regulations, Local Authorities are allowed to top slice from the Dedicated Schools Grant (DSG) funding for a Growth Fund and Falling Rolls Fund.

1.2 The Growth Fund is to support maintained schools and Academies *required* to provide extra places/classes in order to meet basic need within the authority, and funding schools where very limited pupil number growth requires an additional class *as set out by infant class size regulations*. It is not payable where schools have chosen to put on an additional class, but actual pupil numbers do not require them to do so. The Schools' Forum agreed the criteria for the 2014/15 Growth Fund at its meeting on 7th October 2013, and set aside a budget of £250,000.

1.3 The Falling Rolls Fund is to support good and outstanding schools with temporary falling rolls due to a population dip and where numbers are expected to rise again in 2 to 3 years time. The Schools' Forum agreed the criteria for the 2014/15 Growth Fund at its meeting on 7th October 2013, and set aside a budget of £120,000

1.4 Following the October 2014 Census, all schools were invited to make a funding request if they felt that their circumstances met the growth fund criteria. A review of the relevant pupil number data by Finance also identified schools that may potentially qualify for funding. To support their applications, schools were asked to submit information regarding increases in class and teacher numbers between the two academic years.

2. Budget Position

2.1 Six schools meet the Growth Fund criteria and the relevant payments have been approved by the Head of Education as follows (the detailed calculations are in Appendix A):

Calcot Junior £29,167
 John Rankin Infants £29,167
 Purley £8,340
 Spurcroft £29,167
 Theale Primary £23,333
 The Willows £29,167

2.2 No schools are eligible for the Falling Rolls fund – in order to qualify schools need to be good or outstanding, and no such schools are experiencing a significant fall in pupil numbers.

2.3 The overall position on these budgets is as follows:

	Growth Fund	Falling Rolls Fund
DSG Budget Set Aside	£250,000	£120,000
Payments	£148,341	£0
Unspent Balance	£101,659	£120,000

2.4 The total underspend of £221,659 will be carried forward and added to next year's schools block allocation of the DSG, after offsetting any overspends in other budgets within this funding block.

Appendices

Appendix A – Detailed Calculation of Growth Funding per School

Growth Fund Applications and Payments 2014/15

Criteria:

Infant Class size - Additional class required in autumn term as total number of R, yr 1 and yr 2 pupils has now exceeded a multiple of 30
 OR
 Extra class in September to meet basic need
 OR
 Increase in Admission number in September by 5 or more

Funding:

Infant Class Size - £40,000 per class pro rata from September 2014 (7/12 for maintained schools)
 OR (for extra class) 50% AWPU pro rata from September 2014 to March 2015:
 Primary £2,858 x 7/12 = £1,667 per pupil in additional class
 Secondary: £4,346 x 7/12 = £2,535 per pupil in additional class
 (Maximum set at £50,000 x 7/12 = £29,167)
 OR (for increase in admission number) 50% AWPU pro rata from September 2014 to March 2015:
 Primary £2,858 x 7/12 x 50% = £834 per additional pupil
 Secondary: £4,346 x 7/12 x 50% = £1,268 per additional pupil
 (Maximum set at £25,000 x 7/12 = £14,583)

GROWTH FUNDING				OR INFANT CLASS SIZE FUNDING			
Year Group	Oct-13	Oct-14	Increase	Year Group	Oct-13	Oct-14	Increase
Reception			0	Reception	0	0	
Year 1			0	Year 1	0	0	
Year 2			0	Year 2	0	0	
Year 3	63	79	16	TOTAL	0	0	0
Year 4	53	58	5				
Year 5	57	60	3	No. Classes Req'd	Jul-13	Oct-13	
Year 6	55	59	4	Actual No. Classes			0
TOTAL	228	256	28	Additional classes to be funded:			0
	Jul-14	Oct-14					
No. Classes Req'd	8	9	1				
Actual No. Classes	8	9	1				
Actual No. Teachers (FTE)	8.00	9.00	1				
Pupils in Add'l Class:	No.	Rate	Funding	TOTAL FUNDING: 7/12 of £40,000			0
	28	£1,667	29,167				

school has additional class and teacher from September 2014

GROWTH FUNDING				OR INFANT CLASS SIZE FUNDING			
Year Group	Oct-13	Oct-14	Increase	Year Group	Oct-13	Oct-14	Increase
Reception	27	24	-3	Reception	27	24	
Year 1	21	28	7	Year 1	21	28	
Year 2	14	24	10	Year 2	14	24	
Year 3	21	17	-4	TOTAL	62	76	14
Year 4	22	25	3				
Year 5	20	25	5	No. Classes Req'd	Jul-13	Oct-13	
Year 6	20	31	11	Actual No. Classes			0
TOTAL	145	174	29	Additional classes to be funded:			0
	Jul-14	Oct-14					
No. Classes Req'd	5	6	1				
Actual No. Classes	7	7	0				
Actual No. Teachers (FTE)	7.00	7.00	0				
Pupils in Add'l Class:	No.	Rate	Funding	TOTAL FUNDING: 7/12 of £40,000			0
			0				

school has not increased its number of classes & teachers in Sept 2014 & doesn't need to

GROWTH FUNDING				OR INFANT CLASS SIZE FUNDING			
Year Group	Oct-13	Oct-14	Increase	Year Group	Oct-13	Oct-14	Increase
Reception	65	77	12	Reception	65	77	
Year 1	72	71	-1	Year 1	72	71	
Year 2	56	71	15	Year 2	56	71	
Year 3	54	54	0	TOTAL	193	219	26
Year 4	53	49	-4				
Year 5	47	54	7	No. Classes Req'd	Jul-13	Oct-13	
Year 6	56	44	-12	Actual No. Classes			1
TOTAL	403	420	17	Additional classes to be funded:			1
	Jul-14	Oct-14					
No. Classes Req'd	14	14	0				
Actual No. Classes	16	17	1				
Actual No. Teachers (FTE)	16.00	17.00	1				
Pupils in Add'l Class:	No.	Rate	Funding	TOTAL FUNDING: 7/12 of £40,000			0
			0				

school has additional class and teacher in KS1 - but this is not required

GROWTH FUNDING				OR INFANT CLASS SIZE FUNDING			
Year Group	Oct-13	Oct-14	Increase	Year Group	Oct-13	Oct-14	Increase
Reception	84	83	-1	Reception	84	83	
Year 1	88	84	-4	Year 1	88	84	
Year 2	58	89	31	Year 2	58	89	
Year 3			0	TOTAL	230	256	26
Year 4			0				
Year 5			0	No. Classes Req'd	Jul-13	Oct-13	
Year 6			0	Actual No. Classes			1
TOTAL	230	256	26	Additional classes to be funded:			1
	Jul-14	Oct-14					
No. Classes Req'd	8	9	1				
Actual No. Classes	8	9	1				
Actual No. Teachers (FTE)	8.00	9.00	1				
Pupils in Add'l Class:	No.	Rate	Funding	TOTAL FUNDING: 7/12 of £40,000			23,333
	26	£1,667	29,167				

school has additional class and teacher in KS1

Purley				OR INFANT CLASS SIZE FUNDING			
GROWTH FUNDING				OR INFANT CLASS SIZE FUNDING			
Year Group	Oct-13	Oct-14	Increase	Year Group	Oct-13	Oct-14	Increase
Reception	20	15	-5	Reception	20	15	
Year 1	20	19	-1	Year 1	20	19	
Year 2	20	21	1	Year 2	20	21	
Year 3	8	15	7	TOTAL	60	55	-5
Year 4		8	8		Jul-13	Oct-13	
Year 5			0	No. Classes Req'd	2	2	0
Year 6			0	Actual No. Classes	2	2	0
TOTAL	68	78	10	Additional classes to be funded:		0	
	Jul-14	Oct-14					
No. Classes Req'd	3	3	0				
Actual No. Classes	3	3	0				
Actual No. Teachers (FTE)	3.00	3.00	0				
Pupils in Add'l Class:	No.	Rate	Funding	TOTAL FUNDING: 7/12 of £40,000		0	
	10	£834	8,340				
school has increased number of year groups							

Spurcroft				OR INFANT CLASS SIZE FUNDING			
GROWTH FUNDING				OR INFANT CLASS SIZE FUNDING			
Year Group	Oct-13	Oct-14	Increase	Year Group	Oct-13	Oct-14	Increase
Reception	72	73	1	Reception	72	73	
Year 1	60	70	10	Year 1	60	70	
Year 2	58	57	-1	Year 2	58	57	
Year 3	48	58	10	TOTAL	190	200	10
Year 4	45	49	4		Jul-13	Oct-13	
Year 5	44	45	1	No. Classes Req'd	7	7	0
Year 6	45	45	0	Actual No. Classes	7	8	1
TOTAL	372	397	25	Additional classes to be funded:		0	
	Jul-14	Oct-14					
No. Classes Req'd	13	14	1				
Actual No. Classes	13	15	2				
Actual No. Teachers (FTE)	13.00	15.00	2				
Pupils in Add'l Class:	No.	Rate	Funding	TOTAL FUNDING: 7/12 of £40,000		0	
	25	£1,667	29,167				
school has 2 additional classes and teachers but only needs 1 - capped at £29k							

Theale Primary				OR INFANT CLASS SIZE FUNDING			
GROWTH FUNDING				OR INFANT CLASS SIZE FUNDING			
Year Group	Oct-13	Oct-14	Increase	Year Group	Oct-13	Oct-14	Increase
Reception	42	44	2	Reception	42	44	
Year 1	47	41	-6	Year 1	47	41	
Year 2	30	47	17	Year 2	30	47	
Year 3	31	30	-1	TOTAL	119	132	13
Year 4	30	32	2		Jul-13	Oct-13	
Year 5	31	32	1	No. Classes Req'd	4	5	1
Year 6	30	30	0	Actual No. Classes	4	5	1
TOTAL	241	256	15	Additional classes to be funded:		1	
	Jul-14	Oct-14					
No. Classes Req'd	9	9	0				
Actual No. Classes	8	9	1				
Actual No. Teachers (FTE)	8.00	9.00	1				
Pupils in Add'l Class:	No.	Rate	Funding	TOTAL FUNDING: 7/12 of £40,000		23,333	
			0				
infant class size additional class required							

The Willows				OR INFANT CLASS SIZE FUNDING			
GROWTH FUNDING				OR INFANT CLASS SIZE FUNDING			
Year Group	Oct-13	Oct-14	Increase	Year Group	Oct-13	Oct-14	Increase
Reception	45	59	14	Reception	45	59	
Year 1	49	49	0	Year 1	49	49	
Year 2	37	54	17	Year 2	37	54	
Year 3	31	42	11	TOTAL	131	162	31
Year 4	35	32	-3		Jul-13	Oct-13	
Year 5	20	33	13	No. Classes Req'd	5	6	1
Year 6	34	22	-12	Actual No. Classes	5	6	1
TOTAL	251	291	40	Additional classes to be funded:		1	
	Jul-14	Oct-14					
No. Classes Req'd	9	10	1				
Actual No. Classes	9	12	3				
Actual No. Teachers (FTE)	9.00	12.00	3				
Pupils in Add'l Class:	No.	Rate	Funding	TOTAL FUNDING: 7/12 of £40,000		23,333	
	40	£1,667	29,167				
school is running additional 3 classes but only needs 1 additional class for the pupil numbers. Capped at £29k							

The Winchcombe				OR INFANT CLASS SIZE FUNDING			
GROWTH FUNDING				OR INFANT CLASS SIZE FUNDING			
Year Group	Oct-13	Oct-14	Increase	Year Group	Oct-13	Oct-14	Increase
Reception	58	60	2	Reception	58	60	
Year 1	60	59	-1	Year 1	60	59	
Year 2	44	56	12	Year 2	44	56	
Year 3	40	45	5	TOTAL	162	175	13
Year 4	29	42	13		Jul-13	Oct-13	
Year 5	30	33	3	No. Classes Req'd	6	6	0
Year 6	27	27	0	Actual No. Classes	6	6	0
TOTAL	288	322	34	Additional classes to be funded:		0	
	Jul-14	Oct-14					
No. Classes Req'd	10	11	1				
Actual No. Classes	12	11	-1				
Actual No. Teachers (FTE)	13.70	12.80	-0.9				
Pupils in Add'l Class:	No.	Rate	Funding	TOTAL FUNDING: 7/12 of £40,000		0	
			0				
school has not increased its number of classes & teachers in September 2014							