
Criteria and Budgets for Additional Funds 2020/21

Report being considered by: Schools' Forum
On: 9th December 2019
Report Author: Melanie Ellis, Ian Pearson
Item for: Decision **By:** All Forum Members

1. Purpose of the Report

- 1.1 To set out the proposed criteria and budgets for additional funds for 2020/21, as recommended by Heads Funding Group.

2. Recommendation

- 2.1 Agree the proposals in order go out to consultation with schools.

Will the recommendation require the matter to be referred to the Council or the Executive for final determination?	Yes: <input type="checkbox"/>	No: <input type="checkbox"/>
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3. Introduction/Background

- 3.1 School funding regulations allow for a few exceptional circumstances to be funded outside the formula and be top sliced from the DSG. For each fund the Schools' Forum need to agree clear criteria setting out the circumstances in which payments could be made and the basis for calculating the sum to be paid.

- 1) A growth fund for the purpose of supporting growth in pre-16 pupil numbers to meet basic need; to support additional classes needed to meet infant class size regulation; and to meet the costs of new schools. Growth funding is within the Local Authorities' Schools Block NFF allocations.
- 2) A falling rolls fund, where a school has surplus places and faces a funding shortfall but an increase in pupils in the near future is expected.
- 3) Funding for schools in financial difficulty where a school phase has agreed to de-delegate this funding (primary phase only in West Berkshire). There needs to be agreed criteria on how this funding is to be determined and allocated to schools.
- 4) Funding can be used from the high needs block to allocate additional funding to schools which have a disproportionate number of high needs pupils. This has to be determined by a formulaic method.

- 3.2 For each of these funds local authorities are required to produce criteria on which any fund is to be allocated. These should provide a transparent and consistent basis (with differences permitted between phases) for the allocation of the funding.

The criteria should both set out the circumstances in which a payment could be made and provide a basis for calculating the sum to be paid.

- 3.3 In 2018/19 the Schools Forum agreed to cease the Falling Rolls fund because only one school in four years had qualified for a payment. Funds are held for each of the other three circumstances. These now need to be reviewed and amended where appropriate. The forthcoming school funding consultation will invite views from schools.

4. Proposals

- 4.1 To agree the proposed criteria for the Growth Fund, Financial Difficulty Fund and Additional High Needs Fund in order for them to go out to consultation with Schools. The criteria for each fund are included in the appendices for members of the group to review and to propose any amendments.
- 4.2 The budget for each fund also needs to be agreed. Previous year's budgets and actual are shown in Table 1.

TABLE 1	Growth Fund	Primary Schools in Financial difficulty	Additional High Needs Funding	Falling Rolls Fund
2014/15 Budget	250,000	115,470	48,000	120,000
2014/15 Actual spend	148,341	112,297	38,576	0
2015/16 Budget	250,000	115,110	50,000	40,000
2015/19 Actual Spend	158,563	18,677	87,966	0
2016/17 Budget Set	250,000	117,320	127,690	40,000
2016/17 Actual Spend	100,922	137,930	114,033	0
2017/18 Budget Set	162,000	119,980	100,000	40,000
2017/18 Actual Spend	126,287	55,551	100,972	0
2018/19 Budget Set	280,710	379,120	100,000	0
2018/19 Actual Spend	87,500	127,073	83,609	0
2019/20 Budget Set	655,800	252,047	100,000	0

- 4.3 The growth funding from 2019/20 is allocated to local authorities using a formulaic method based on lagged growth data. The 2019/20 Schools Block growth fund allocation for WBC was £555k, which included funding for the new primary school Highwood Copse which was expected to open in September 2019. We have not yet received the 2020/21 allocation.
- 4.4 The primary schools in financial difficulty fund had £252k remaining at the end of 2018/19 and it was not topped up in 2019/20. Bids amounting to £71,000 have been approved in 2019/20, therefore a decision needs to be made whether to de-delegate this service in 2020/21, in order to top up the fund, or whether to leave the reserve at £181,000, assuming no further bids are received.
- 4.5 It is apparent that the number of schools with a disproportionate number of high needs pupils is continuing to grow, and funding needs to be set aside from the high

needs block at the current level of spend, in order to fund those schools qualifying. It is proposed that this remains at £100k.

5. Appendices

Appendix A – Proposed Growth Fund Criteria 2020/21

Appendix B – Proposed Primary Schools in Financial Difficulty Fund Criteria 2020/21

Appendix C – Proposed Additional High Needs Fund Criteria 2020/21