

Wiltshire Council

School's Forum

18 January 2018

Allocation of Funding for Pupil Growth 2018-19

Purpose of the Report

1. To seek agreement on the methodology for allocating funding for pupil growth from the centrally retained growth fund in 2018-19.
2. To seek agreement on the amount of funding to be allocated for pupil growth.

Background

3. Wiltshire currently operates a growth fund and Schools Forum agreed to a number of criteria for the allocation of funding for pupil growth in previous years. The current growth fund criteria has been confirmed as being fully compliant by the Education and Skills Funding Agency (ESFA).

Main Considerations

4. Funding for significant pupil growth can be retained centrally as part of the schools contingency before the formula is calculated. This can include funding to be allocated for additional classes arising from Basic Need or additional classes needed as a consequence of infant class size regulations. The requirements are that:
 - a) the growth fund can be used only for the purposes of supporting growth in pre-16 pupil numbers to meet basic need and to support additional classes needed to meet the infant class size regulation
 - b) the fund must be used on the same basis for the benefit of both maintained schools and recoupment academies
 - c) any funds remaining at the end of the financial year must be added to the following year's DSG and reallocated to maintained schools and academies through the local formula
 - d) local authorities will be required to produce criteria on which any growth funding is to be allocated. These should provide a transparent and consistent basis (with differences permitted between phases) for the allocation of all growth 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

- e) local authorities will need to propose the criteria to the Schools Forum and gain its agreement before growth funding is allocated. The local authority will also need to consult the Schools Forum on the total sum to be top-sliced from each phase and must regularly update the Schools Forum on the use of the funding.

Historical Position

- 5. Schools Forum has historically agreed an annual budget of £1m to be retained centrally for the purpose of funding pupil growth. In the financial year 2018-19 it is proposed to retain the budget at the £1m level.

Affordability

- 6. During 2018-19, there will be a new Primary School opening at Fugglestone in Salisbury. The new school, St Peter's, is due to open in September 2018. The growth fund continues to support new primary schools with diseconomy costs which have opened since 2014, Castle Mead Primary, Wellington Academy Primary and Ridgeway Farm Primary Academy.
- 7. The Basic Need Class Expansion for additional classes is still to be confirmed with colleagues in the School places team.
- 8. The Infant Class Size increases are still to be confirmed for 2017-18, but as the number of primary pupils continues to grow across Wiltshire, the funding factor will continue to be used to support schools seeing rapid growth in infant pupil numbers.
- 9. The total Growth Fund requirement for 2018-19 is anticipated to come within the budget.
- 10. In addition, the local authority continues to lobby both the ESFA and the MOD to support the schools affected by the MOD's Army Re-basing programme. Political support has been offered to ensure that our Wiltshire schools are not dis-advantaged as a result of the programme.
- 11. The proposed criteria for funding pupil growth within the local Wiltshire funding formula in 2016-17 are as follows:

Proposed Criteria

New School Allowance (unchanged from 2013-14):

- 12. Schools receive funding in advance of pupils arriving in the school, based on the result of the pupil teacher ratio rounded up to the nearest next whole number. The PTRs used are 26.5:1 for KS1 & 27.5:1 for KS2 + 1.1. The topped up element to the next whole number is arrived at by multiplying the result by the salary of a teacher on the top point of the teacher's main scale + on-costs. This element will apply until the first year group has left the school or until the school is full.

13. In addition the costs of a head teacher and 10 hours admin support will be available one "old" term before opening. 55% of the Basic Flat Rate will be available two "old" terms before opening. In the first year of opening the school will also receive 34% of the Basic Flat Rate, 17% in the second & 8.5% in the third year after opening.
14. The 'Basic Flat Rate' has always been considered to the lump sum value which has until 2017-18 been set at £85,000 for primary and £175,000 for secondary schools. Under the proposals for the new National Funding Formula, the lump sum will move to £110,000. The LA has not opened any new secondary schools for a number of years but the impact of the change in lump sum to primary schools would be as detailed in the table below;

	Flat rate £85,000	Flat rate £110,000
Year 1 – 55%	£46,750	£60,500
Year 2 – 34%	£28,900	£37,400
Year 3 – 17%	£14,450	£18,700
Year4 – 8.5%	£7,225	£9,350
Total	£97,325	£125,950

15. New schools may also receive an estimate of the new pupil intake for the forthcoming academic year. This approach will be in place for the number of years equal to the number of year groups at the school. The initial estimate may be changed at a later date (but no later than the end of Term 6) to more accurately reflect the likely new intake, with the agreement of the school.

Class Expansion for Basic Need (unchanged from 13-14):

16. Where a school is expanded to provide additional classes to meet a basic need for places identified by the LA, from the month of opening for the remainder of the financial year only the school will receive $\frac{7}{12}$ ths* x 30 x relevant AWPU for each additional class. Where a full class may not be needed then the school would receive $\frac{7}{12}$ ths x estimate of increased September intake x relevant AWPU. The definition of "expanded" is that a building project or addition of a mobile classroom has taken place.

* - For Academy schools the funding is paid for 12/12ths as it relate to their funding year.

Infant Class Size Increases:

17. This is payable to a Primary School with infant classes which is required to set up an additional class in the Autumn term as required by the infant class size regulations, and the school cannot accommodate all of its additional Reception and Key Stage 1 pupils in classes of 30 or less, i.e. the total number of pupils in the 3 year groups exceeds a multiple of 30. Where the total increase in NOR between the two October census dates is greater than 13 and necessitates that an extra class would be required, then additional funding is allocated per additional class.

18. Schools Forum needs to approve the above criteria for application in 2018-19.

Proposal

19. It is proposed that:

- a) Schools Forum approve the criteria for allocating pupil Growth Fund in 2018-19.

- b) Schools forum confirm the value to be used as the 'flat rate' for new school funding in 2018-19. Should it be retained at £85,000 or should it mirror the lump sum in the funding formula.

- c) Schools Forum agree that the budget for the Growth Fund is retained at a maximum of £1m for 2018-19.

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