

Allocation of Funding for Pupil Growth 2015-16

Purpose of the Report

1. To seek agreement on the methodology for allocating funding for pupil growth from the centrally retained growth fund in 2015-16.
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 the 2014-15 financial year. A revision to the scheme was made for 2014-15, due to the previous Wiltshire scheme becoming non-compliant. The element of the scheme that required amendment was the factor for in year pupil growth, as funding can only be provided for growth due to basic need or to meet infant class size regulations. As a result of this, the Wiltshire scheme was revised to only allocate in year growth funding, where it is required to meet infant class size regulations.

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 recouperment 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. At the meeting on the 6th December 2012, Schools Forum agreed that funding for pupil growth should be retained centrally and that a budget of £1.1 million should be allocated for this purpose, in 2013-14.
- 6. At the Schools Forum meeting on the 16th January 2014, it was agreed that a budget of £0.848m should be retained centrally for the purpose of funding pupil growth in the financial year 2014-15.

Affordability

- 7. During 2014-15, there were two new primary schools which opened in Wiltshire, Castle Mead Primary Academy and Wellington Academy Primary. Old Sarum Primary is still in receipt of the New Schools Allowance as it is less than seven years old. The actual cost of the New Schools Allowance to these schools was £205,083.
- 8. The Basic Need Class Expansion for additional classes will cost £211,147 in 2014-15 and has been paid out to 7 schools.
- 9. The Infant Class Size increases were estimated, based upon the last two years, as being payable for twenty-five classes, equating to £455,250. The actual position, based upon the October 2014 data has indicated that there are 25 classes required, totalling £455,250.
- 10. The total Growth Fund requirement for 2014-15 is therefore anticipated to cost £871,480, representing an overspend of £0.023 against the current budget.
- 11. The proposed criteria for funding pupil growth within the local Wiltshire funding formula in 2015-16 are as follows:

Proposed Criteria

New School Allowance (unchanged from 2013-14 & 2014-15):

- 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. 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 2013-14 & 2014-15):

15. 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.

Infant Class Size Increases:

16. 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. If the total increase in NOR necessitates that an extra class would be required, then additional funding is allocated per additional class.

17. Schools Forum needs to approve the above criteria for application in 2015-16.

Proposal

18. It is proposed that:

- a) Schools Forum approve the criteria for allocating the pupil Growth Fund in 2015-16.
- b) Agree that the budget for the Growth Fund is set at a maximum of £1m, subject to the affordability within the funding formula for 2015-16.