

**Meeting Title**
**NOTES OF FORMULA ALLOCATION REVIEW GROUP NO 7 – 2<sup>nd</sup> meeting**
**Venue**

Mezz, Tor Hill House, Torquay

**Date**

 11<sup>th</sup> June 2013

**Present**

Lisa Finn (LF) – Finance Manager Torbay Council – 01803 208283  
 Roger Hughes (RH) – Chair Schools Forum  
 David Theobald (DT) – Headteacher White Rock Primary  
 Claire Shiers (CS) – Business Manager Oldway Primary  
 Jessica Humphreys (JH) – Curledge St Primary  
 Daneian Rees (DR) – Business Manager St Cuthbert Mayne  
 Carolyn Andrews (CA) – Business Manager Homelands Primary School  
 Amanda Haley (AH) – Principal Accountant – Schools/Children’s Services  
 Rob Parr (RP) – Principal Accountant – Children’s Services

**Apologies**

Matt Redwood (MR), Gill Gribbins (GG) - PC&SC  
 Rob Breeze (RB) – St Margarets Primary  
 Helen Brown (HB) -Sacred Heart Primary  
 Jessica Humphreys (JH) – Curledge St Primary  
 Sue Foot (SF) – Business Manager Churston Ferrers Grammar School  
 Sharon Wallwork (SW) – Business Manager Torquay Girls Grammar School  
 Sean Hindle (SH) – Business Manager Hayes Primary School  
 Sandy Dorrell (SD) – Finance Officer Hayes Primary School

1.	<b>Matters arising</b>	<b>Action</b>
	MR is absent so LF chaired the meeting  None	All to note
2.	<b>Notes from the previous meeting 16<sup>th</sup> May 2013</b>  No comments/amendments	All to note
3.	<b>Review of the DfE findings of the School Funding Reform consultation (June 2013)</b>  LF went through the document’s findings to establish the changing DfE requirements including changes to the factors.  <b><u>Pupil Led Funding</u></b>  A minimum of 80% of delegated funding is to be allocated using pupil led factors. Torbay allocates 94% so we are well above the minimum.  The AWPU rate has to be at least £2,000 for Primary (Torbay £2,739) and Key Stage 3 & 4 £3,000 (Torbay KS3 £3,824; KS4 £4,005). Therefore we are well within the range for both phases.  <b><u>Prior Attainment</u></b>	All to note

Early Years Foundation Stage Profile (EYFSP) will be retained as the main indicator for prior attainment for primary pupils but that qualification will be where they have not achieved a good level of development which in turn translates into all those pupils who have not achieved the expected level of development in all 12 prime areas as well as maths and English.

For KS 2 prior attainment, the factor has changed to those pupils who fail to achieve a level 4 or higher in Maths or English. For Torbay the current data suggests that there will be very little change to funding as a result.

### **Deprivation**

The amount of funding allocated using deprivation is around 8%; Torbay allocates 11% so again we are above the average which does reflect our decision-making over the previous years.

There are no changes to this allowable factor

### **Looked After Children LAC**

The definition of a LAC for funding purposes will change to include all those pupils who have been termed looked after for one day or more. Torbay does not currently use this factor but it has been modeled and presented to the meeting who agreed that given the number of pupils and the unit value the impact was not significant enough to warrant a change and therefore should not be used in 14/15.

### **Pupil Mobility/Transience**

This factor was not used by the majority of Councils in 13/14 including Torbay. The main reason cited was that it did not allow Councils to target funding to schools with high volumes of mobile pupils.

For 14/15 a threshold of 10% mobility will be applied, so those schools with at least 11% mobility will receive funding which will be for mobility above 10%. This factor has been modeled and presented to the group. The importance of this particular model is that a comparison with 13/14 and 12/13 is misleading as it does appear that the changes to "right a wrong" to some extent as it effectively reverses the impact of not using mobility in 13/14. However, when actual funding and the impact of any minimum funding guarantee (MFG) is taken into account, a number of schools who are protected by MFG and gain from the changes demonstrated in the modeling will not actually see any cash change to their overall funding. It was agreed that implementing this change would not make a significant change and therefore should not be used in 14/15.

### **Lump Sum**

Funding allocated via the lump sum varied widely. The average lump sum was £174k, Torbay's is £71,897. The purpose of the lump sum is to provide sufficient funding to support small schools which could not operate on the basis of per pupil funding alone. The definition of a small school is that which has 100 or fewer pupils based on the annual October pupil census. Torbay has one school in this category.

For 14/15, the maximum lump sum will be £175,000 plus there can be a different lump sum for each phase up to this cap. To increase the lump sum would reduce the amount allocated via pupil led factors which is possible given the fact that Torbay is well above the minimum on this (see Pupil Led Funding above). The group agreed that the current £72k was agreed at previous meetings and should be left unchanged.

**Schools with Falling Rolls**

Council will be able to top-slice DSG to create a small fund to support falling rolls in exceptional circumstances.

**High Needs Funding**

Although the DfE recognise that changes to pupils to statements of educational needs have been challenging but it was too early to make any further changes at this stage.

**Minimum Funding Guarantee (MFG)**

The DfE has again set this at minus 1.5%. The following allocations will continue to be excluded from MFG:-

- lump sum
- post 16 funding
- allocations from high needs block incl SEN named pupils
- Early Years Single Funding formula
- Business Rates

**2014/15 Timing/Deadlines**

Allocations to schools need to be made by 28<sup>th</sup> February 2014. This is 2 weeks early than 13/14. In Torbay we issued 13/14 school allocations on 8<sup>th</sup> February 2013.

**4 Future Meetings**

It was agreed that a further meeting is no longer required given the views of the group on mobility, LAC and Lump Sum. LF thanked the group for their participation and stated that MR will consider the views of the group and consult with all partners in the Autumn term.

All to note

**Recorded by**

Lisa Finn – Finance Manager Financial Services