

Meeting Title
NOTES OF FORMULA ALLOCATION REVIEW GROUP NO 7
Venue

Mezz, Tor Hill House, Torquay

Date

 16th May 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
 Sue Foot (SF) – Business Manager Churston Ferrers Grammar School
 Sharon Wallwork (SW) – Business Manager Torquay Girls Grammar School
 Daneian Rees (DR) – Business Manager St Cuthbert Mayne
 Sean Hindle (SH) – Business Manager Hayes Primary School
 Sandy Dorrell (SD) – Finance Officer Hayes Primary School
 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

1.	Matters arising	Action
	MR is absent so LF chaired the meeting	All to note
2.	Welcome and Introductions	
	Group introduced themselves	All to note
	Representatives from Primaries/Secondaries including Academies	
3.	Terms of Reference of FAR 7	
	<p>The purpose of the group is to :-</p> <ul style="list-style-type: none"> a. Review the newly implemented funding formula for 2013/14 b. Discuss the DfE 13/14 funding comparative analysis (BAR charts) and Torbay’s position c. Consider where changes can be made which have to be within the confines of the DfE imminent release of the 2nd phase of the school funding formulae proposals d. Report to Schools Forum in the Autumn on the group’s recommendations <p>This group is not a decision making body</p>	All to note
4	Review of Changes in 2013/14	
	<p>LF led the group through the DfE Schools Block funding formulae 2013/14 – Analysis of the L.As’ schools block funding formulae.</p> <p>For the majority of sub formulae, Torbay’s per pupil amount was similar to the majority of other Council’s.</p>	All to note

	<p>Those sub formulae where we were not similar are as follows;-</p> <ol style="list-style-type: none"> 1. AWPU KS 4 – per pupil amount £4k-£4.3k whereas the majority of L.As had higher per pupil amounts 2. Deprivation - % of funding allocated via deprivation factors – Torbay is in the upper half of the table and this reflects the work we have been doing over the last few years and targeting more funding using FSM/Transience/IDACI etc. 3. Looked After Children – Torbay did not use this factor whereas 53% of Councils did use it but it accounted for a very small % of overall funding. 4. Mobility (Transience) – Torbay does not use this factor whereas the majority of Councils are allocating approx £200 per eligible pupil however the total funding allocated via mobility accounts for less than 2% of their overall funding so it is not significant issue. 5. Lump Sum – Torbay’s amount of £72k per school (Prim & Sec) is significantly lower than the majority of other Councils where the average lump sum is £150k. 6. Primary: Secondary funding ratios – Torbay’s is 1:1.31 which is very close to the national average of 1:1.27. 	
5	Impact of the Changes on Torbay Schools	
	<p>JH stated that the absence of a mobility factor does have a negative effect on those schools who previously received significant funding via this route. LF circulated the modeling that was carried out by FAR 6 when the mobility factor was considered. Due to its “blunt” nature, the new funding method for mobility would have gone to all schools which had any pupil leaving early or arriving later in the term. This had the effect in the modeling to spread the same level of funding across more schools and thus take it away from those schools which has very high levels of pupil mobility.</p> <p>Changes to statementing – it was acknowledged by the group that parents were expressing their concern that a statement of SEN does not in the main generate specific funding for that statement. There is unlikely to be any change in this approach however, the Council does have discretion to fund those schools whose specialism does attract pupils with certain statements of SEN. MR is the lead on this.</p>	All to note
6	DfE consultation and Potential Changes for 2014/15	
	<p>The DfE consultation on School Funding Reform: Next Steps towards a fairer system closed on 26th March 2013. The results of this have not yet been released.</p> <p>It is likely though that the DfE will consider changes to lump sum, mobility, LAC.</p>	
7.	Potential Areas of Review within Torbay’s formula	
	<p>The group agreed that LAC should be modeled for the next meeting and if there are any other changes then these can also be modeled and sent out ahead of that meeting.</p> <p>There weren’t at this stage any other areas that the group considered modeling but that this may change after the results of the DfE consultation are considered.</p>	All to note
8.	Date and Time of Future FAR 7 Meetings	All to note
	<p>Meeting no 2 - 11TH June 2pm Mezz Room 3 Tor Hill House Torquay</p> <p>Meeting No 3 - 27th June 9.30am Mezz Room 3 Tor Hill House, Torquay (pay & display car park in Castle Circus)</p>	

9.

AOB

AH to speak with JH concerning funding issues as a result of conversion to Academy
DT to email LF letter about pupil growth SEPT 13

AH
DT

Recorded by

Lisa Finn – Finance Manager Financial Services